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# Evidence-based policy in Erasmus+

Warsaw seminar 2017

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# **Evidence-based policy in Erasmus+**

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Warsaw seminar 2017

FRSE THEMATIC REPORTS

**Evidence-based policy in Erasmus+  
Warsaw seminar 2017**

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**PAWEŁ POSZYTEK**  
PhD, General Director  
Foundation for the  
Development of the  
Education System

The Foundation for the Development of the Education System with its over twenty-year-long history of administering European educational programmes - starting from TESSA, TERM, SMART funded by PHARE, through Socrates, Youth for Europe, Lifelong Learning Programme and Youth in Action to current Erasmus+ - has played an important role in making an educational change in Poland.

Our achievements do not involve only the numbers of effectively implemented projects. One of the key areas of the Foundation's activity, recently developed, is analytical and research work, which focuses on measuring the impact and results of the European programmes including - above all - the Erasmus+.

The FDES participates in international and national education research projects, cooperates with other national Erasmus+ agencies and foreign research institutes. Research on European programmes allows us to assess their actual outcomes, both on individual participants and institutions as well as environments they are rooted in. The solid, collected data and in-depth analysis, which we believe in, are the foundation of any informed discussion about the development of education policy at all levels.

The following publication collects papers of participants of the first-ever seminar on evidenced-based policy in Erasmus+, which the Foundation was happy to organise in October 2017. I recommend all readers interested in the role of research in education to have a look at this extensive amount of valuable input, which we hope will contribute to further development of the research practice.

*Paweł Poszytek*  
*General Director*  
*Foundation for the Development*  
*of the Education System*

## Editors' note

The role of research in education is to deliver evidence to stakeholders responsible both for grassroots actions and policy changes. Such tasks primarily aim at measuring which abilities and competences (as well as to what extent and in which learning contexts) were acquired on an individual and institution level.

Our seminar was addressed to every person dealing with research activities in the Erasmus+ programme: researchers, external experts, representatives of academia as well as of Erasmus+ National Agencies. It aimed at:

- delivering results of research activities related to measuring the quality and effectiveness of Erasmus+ across Europe;
- sharing experiences and good practices in methodology and research tools;
- enhancing cooperation and building partnerships for new joint research activities.

For the first time we managed to bring together NA representatives and researchers from 5 Erasmus+ sectors: higher education, vocational education, adult education, school education and youth. Nearly 90 participants from 21 countries came together to share experiences and research practice.

This publication is a set of seminar proceedings of those authors who agreed to contribute to the seminar in addition to the presentations they gave or other input they had. Papers on the impact on individuals are placed at the beginning, followed by those measuring institutional impact and other contributions.

We would like to thank everyone who submitted papers, presentations and posters for an interesting programme. All presentations can be found on our website.

We would also like to thank all participants who attended the seminar, contributing to discussions and professional networking.

We look forward to welcoming you at our future seminars.

*Agnieszka Rybińska,  
Özgehan Şenyuva*

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### ÖZGEHAN ŞENYUVA

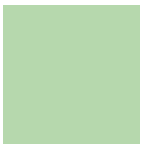
is an Associate Professor in the International Relations Department at Middle East Technical University, Ankara, where he works on youth, public opinion, Turkey-European relations and the politics of European football. He has extensive experience in international research projects. He has worked for more than two decades as a youth worker/trainer. A steering group member of European Platform on Learning Mobility and member of the Pool of European Youth Researchers of the European Commission and the Council of Europe. Author of numerous research publications and articles.

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### AGNIESZKA RYBIŃSKA

Research and Analysis Department and Publications Unit Director of the Foundation for the Development of the Education System. Experienced in coordination and monitoring of state aid programmes. Her research addresses mostly the evaluation of public interventions, including EU funds earmarked for SMEs and education sectors. Recently engaged in evaluation of various aspects of education policy, including assessment of education sector performance and transition from school to work.





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# Résumé of the seminar

## By Bogdan Sot

One of the crucial notions raised during the seminar concerned exploiting the Erasmus+ programme in terms of research. Apparently, this exploitation has been so far only partial. The accumulated pool of data that could be analysed is very rich in terms of variety and content (many different questions answered by beneficiaries/mobility participants). The data is also rich in terms of the encompassed time period. Knowledge which it can reveal remains to a large extent an unknown, nonetheless promising, *terra incognita*.

If we take usability of that data into consideration, we could detect that Erasmus+ data is more usable than that of its predecessors. That is because more modern and comprehensive tools were used to store the data and display it. On the other hand, data from previous programmes has the value of time that passed from the days of mobility to the present stage of the individual's life.

Another important notion relates to the nature of the accumulated data, which is chiefly declarative. For that reason it may have the bias of self-perception. Generally, to be more credible, such data could be accompanied by information on mobility effects, coming from sources other than just the statements of mobility participants. Some findings basing on declarative data may not be very credible and should be used with caution. The data, accumulated by projects and mobility reporting, is valuable by being so widespread, and the more trustworthy it is, the better and stronger its impact on real-life educational policy. Having this in mind, one could think about cross-national research targeted at assessing its credibility. The results of such research could be used for redesigning reporting tools for the sake of this or future programmes, so they become better "transmission belts," translating accumulated data and findings based on them into policy.

In the light of seminar discussions, the issue that undoubtedly deserves more attention is the impact of projects. As emerges from research done by French and UK colleagues, the impact section of the application does not draw much attention from applicants and is often inadequately evaluated in quality assessment carried out by NAs. Apparently, there is room for international research, which would i.a. assess the link between content of the impact section of the application perceived as the ex-ante stage, the quality score it has received during assessment and ex-post evaluation of real project impact. Research results would contribute to establish a set of common impact indicators.

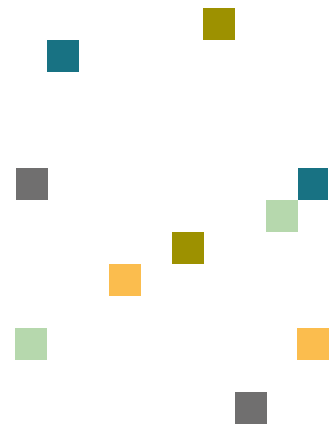
The seminar has also shown that there are many important areas that could be further explored, e.g. language skills improvement by sectors or

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### BOGDAN SOT

has been working in the Research and Analysis Unit of the Foundation for the Development of the Education System since 2016 and in the Polish NA since 2010. He holds a Master's degree in international economics awarded by the Faculty of Economic Sciences, University of Warsaw.

unequal mobility participation by gender. One could also consider international research on those factors which attract students or detract them from going from certain countries to others. Such research seems feasible even on the basis of data which is already accumulated. Consequently, some actions to reduce barriers or to create inducements regarding certain mobility directions could be launched, to diversify and internationalise mobility to an even higher extent.



# How to map surveys on Erasmus+

## Reflection on the Warsaw seminar from the Polish Eurydice Unit perspective

By Magdalena Górowska-Fells and Michał Chojnacki

The seminar was focused on the analysis of the impact of Erasmus+, in particular on research and applied methodologies. Eurydice<sup>1</sup> supports Erasmus+ with provision of evidence-based information and data on education systems as part of the programme (Key Action 3). This gives Eurydice researchers many opportunities to support their colleagues working on research and analysis of the programme with provision of information collected in reports and databases. However, the Warsaw seminar created a unique possibility of direct involvement in discussions on the topic of the impact of Erasmus+. It has always been apparent that the programme influences education systems via projects and mobility, but this time there was a chance to follow this impact in detail.

### Seminar discussions

The Warsaw seminar was the perfect opportunity to see what types of surveys have been carried out on the impact of Erasmus+ and in which countries. The participants learned about surveys implemented, their methodology and results, but also about those which are being implemented now or are planned in the near future.

As persons working for the Eurydice network, which collects information and data about education systems in Europe, we followed both survey presentations and discussions with great interest. It was fascinating to see what happens in Erasmus+, both in terms of survey results and recommendations that are expected to follow research. During discussions a clear need for cooperation was noted in terms of carrying out research, such

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**MAGDALENA GÓROWSKA-FELLS** holds a Master's degree awarded by the Institute of Sociology, University of Warsaw. She has worked at, among others, the University of Warsaw and the EC Tempus Office in Brussels. Since 2000 she has been employed in the Polish Eurydice Unit, Foundation for the Development of the Education System, whose activities she has been coordinating since January 2013.

<sup>1</sup> The Eurydice network supports and facilitates European cooperation in the field of lifelong learning by providing information on education systems and policies in 38 countries and by producing studies on issues common to European education systems. It consists of: 42 national units based in 38 countries participating in the Erasmus+ programme (28 Member States, Albania, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia, Iceland, Liechtenstein, Montenegro, Norway, Serbia, Switzerland and Turkey) and a coordinating unit based in the Education, Audiovisual and Culture Executive Agency in Brussels. Since 1980, the Eurydice network has been one of the strategic mechanisms established by the European Commission and Member States to support European cooperation in the field of education. Since 2014, Eurydice has been included in Erasmus+, Key Action 3 (Support for policy reform).

as use of mutual questionnaires, platforms for international surveys and cross-sectoral cooperation meaning one sector sharing its experience in research with other sectors. As was mentioned during the discussion, research on mobility could be implemented across countries and across sectors if the methodology was carefully prepared. The issue of timing – when to approach respondents – was also addressed. In order to measure the impact of mobility this should be done before and after project implementation. But then long-term impact can be captured later, when several years after mobility the graduates can be tracked on the labour market. And does their success derive from involvement in mobility or from other aspects of their personal career?

Suggestions regarding additional groups of respondents were also very interesting. Surveying mobility participants is obvious, but suggestions to address staff who work with mobility participants, employers who hire them or Erasmus+ National Agency staff working in a given sector seemed a creative way of bringing a new, additional dimension to the research on impact.

In terms of methodology there were several interesting issues addressed such as the reflection that it was on the whole easier to implement cross-national rather than cross-sectoral research as sectors follow different agendas. Clear definition of research objectives was called for together with encouragement for creative, even “crazy” ideas. Obviously there is a need for a more innovative approach rather than repeating standard post-mobility questionnaires. Also a need for better communication of results – to all, including policymakers – was stressed.

Additionally, the discussions on the impact of Erasmus+ brought several interesting conclusions regarding education systems. The seminar made it possible to see the systems in greater detail, and also, perhaps, in a more practical manner as Eurydice often looks at things from the point of view of policymakers, recommendations, strategies, legal regulations and national statistics.

There was a discussion, among others, about the lack of soft skills observed among teachers and students, about different aspects of the impact of learning abroad and the possibility of using it as a pedagogical tool or particular researchers' view on their national education systems. Also the issue of difficulty in measuring such delicate phenomena as impact of mobility was addressed as it is nearly impossible to separate general learning outcomes from those generated by a study period abroad.

It seems from the seminar discussions that in general Erasmus+ researchers are interested in two major aspects of the programme's impact:

- possible cross-sectoral and cross-national inspirations in research, approaches and methodologies which can be used in all sectors of Erasmus+ and in several countries, and surveys which would be applicable in more than one sector of the programme;
- any plans for future developments – research ideas to be implemented and surveys which, successful and interesting in one country, can be implemented by others.

Moreover, there was a clear call for more collaboration and communication among researchers from different countries and institutions, as more research on Erasmus+ should be encouraged.

At this point we realized that working for Eurydice, which specializes in comparative reports on education, gives us a completely different perspective from that of our Erasmus+ colleagues, who survey the impact of the programme, and perhaps this can help with the problems and needs expressed during the seminar discussions.

## Mapping of surveys – a proposal

Eurydice operates on a different level and this general outlook has inspired us to propose the construction of a map of all implemented surveys on Erasmus+ across Europe.

The idea of a scoreboard is not new to the European Commission and its researchers. A scoreboard on student mobility in higher education has already been published twice by Eurydice and the recent edition was launched in parallel with a twin mobility scoreboard in VET produced by Cedefop. Another edition of a student mobility scoreboard in higher education is planned for 2019. The methodology used by Eurydice is based on sets of indicators which attempt to illustrate how different countries regulate conditions for student mobility. As a result we end up with a graphic overview of some aspects of mobility – from linguistic preparation to recognition issues – in particular countries. The aim is to see which country does best in the student mobility area in higher education but for us this ranking aspect is probably less interesting. What we would like to propose is to construct a purely practical scoreboard for mapping surveys on the impact of Erasmus+ in Europe.

The scoreboard should be presented in the form of a table. Clearly, in column one a list of all countries involved in Erasmus+ should appear. Then subsequent columns would list all sectors and actions of the programme. Researchers from particular countries could insert information on their individual surveys in the table fields. E.g. the Finnish teacher/staff mobility in VET presented during the seminar by Siru Korkala could be inserted in the field for Finland and the VET sector, and the tracer study of mobility participants students in higher education carried out by Joanna Dąbrowska-Resiak could be presented in the field for Poland and the HE sector. The content of each field can, of course, be discussed. For obvious reasons the table fields could include the survey title, authors, date, perhaps three major topics or findings and a link to a detailed description of the survey (e.g. the survey webpage). Moreover, this information could be extended and edited with added links to surveys and reports.

But if researchers had a need for the scoreboard to rank countries according to their effort in Erasmus+ impact research, the fields could also be enriched by marking countries with colours depending on the number of surveys carried out: e.g. no surveys – dark red, 1 survey – light red, 2 – yellow, 3 – light green, 4 and more – dark green. This approach is used in the Eurydice student mobility scoreboard and gives a quick overview of who is involved and to what extent. If the ranking approach is adopted, only implemented surveys will be taken into consideration.

Another idea comes to mind regarding surveys carried out and those planned or under implementation. They could be marked with special symbols, edited when needed, according to changing circumstances (status: completed, under implementation, to be launched – with indicated date if possible).

The scoreboard could be accessible on the NA directors portal and/or linked to all national Erasmus+ websites. The NA researchers should be able to edit the data in the scoreboard by adding new information or updating links.

In general, the scoreboard would immediately show empty fields where no research has been implemented, both in terms of countries and sectors/fields. This could be an inspiration as it would be immediately visible what others have done in terms of surveys carried out and what is missing in a given country's row. It would be possible to see which fields are nearly full with implemented surveys and which are clearly less popular among national researchers, so perhaps need further attention.

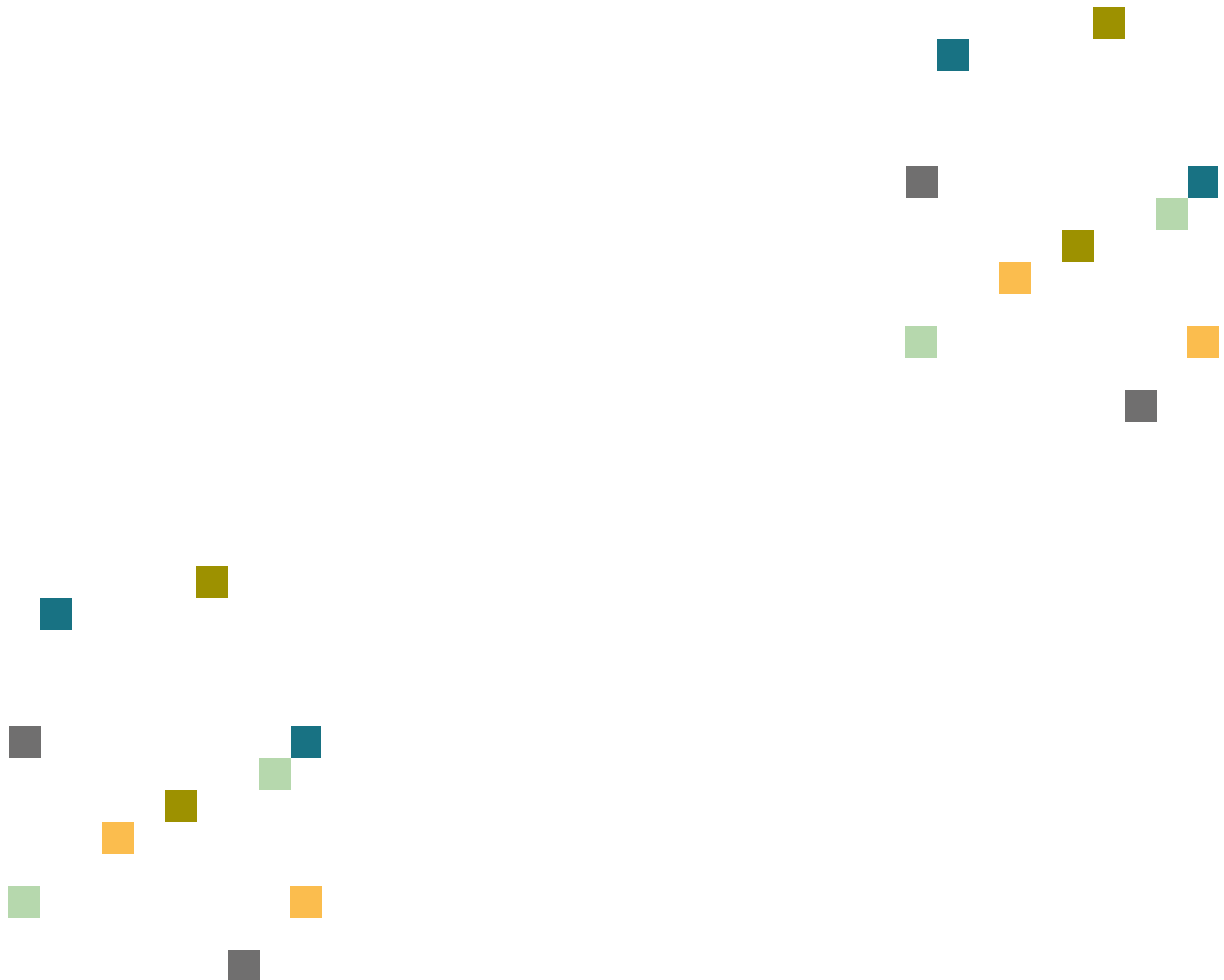
Preparation of this kind of overview seems to fall in line with some of the final conclusions of the Warsaw seminar, such as a call for strategy on research in Erasmus+, which could be done under a European

umbrella, an expressed need to improve dissemination of results, as well as the above-mentioned idea of creating space for innovation.

This mapping could serve many purposes and it is possible to construct it before the next seminar on evidenced-based policymaking in Erasmus+ is organised. We hope that we will get the chance of further involvement in evidence-based policymaking seminars to learn more about the impact of the programme, and perhaps see the scoreboard being constructed.

## References

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# Erasmus+ impact and implications



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# Methodological framing for the Erasmus+ Impacts Observatory

By **Arnaud de Champris**

## Abstract

The Erasmus+ France / Education & Training Agency aims to settle the conditions of an actual evaluation of Erasmus+ impacts. Here, the numerous and diverse audiences of education and training, and not of the Youth Program, are involved. This issue being shared by all the institutions which, in France, finance mobility, the conception of an Impacts Observatory was doubly justified. By bringing together these various actors, the Observatory has defined fundamental evaluation issues, analysed common expected impacts, and proposed 21 elementary indicators. The core methodological challenge is to enable the post-mobility follow-up of individuals, at a given frequency. Thus, it is necessary to have large statistic bodies. In accordance with this order a project aimed at designing an online platform which allows this follow-up is here presented. This project is now intended to be operational.

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**ARNAUD DE CHAMPRIS,**  
in 1990 created the firm  
E.C.s. specialising in the  
evaluation and long-term  
forecasting of public policies;  
the firm has presented nearly  
200 references to all types  
of public sponsors. Between  
2007 and 2010 he was the  
Vice-President of the French  
Evaluation Society. He held  
a Doctorate in Humanities  
awarded by Paris IV  
Sorbonne.

## I. The Erasmus+ impact observatory

### I.1 The process: federating around shared knowledge

#### **The Erasmus Agency's initiative + Education/Training at the heart of a concern shared by mobility policies**

Following on from the "Better Regulation" initiative adopted in May 2015, which aims to introduce guarantees into legislation so that European Union interventions are more effective, transparent and targeted, the European Commission is calling for impact assessments to be carried out for its various programmes. It wants to demonstrate the causality of European funding on changes produced by programmes in line with their objectives. To this end, the Erasmus+ France / Education & Training Agency has launched the process of creating an "Erasmus+ National Impact Observatory", in order to broaden the scope of the data collected, to pool impact assessment efforts and to increase the effectiveness of the dissemination of results. The Observatory should

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#### **KEYWORDS**

EDUCATION, MOBILITY,  
TRAINING, IMPACTS,  
EVALUATION,  
INTERNATIONALISATION,  
PERSONAL DEVELOPMENT,  
SKILLS, EUROPEAN  
INTEGRATION, STAFF  
MOBILITY, STUDENT  
MOBILITY.

also enable the National Agency to anticipate and better meet the European Commission's increased requirements in terms of evaluation, particularly as regards impact assessments.

The Observatory must therefore be a catalyst of knowledge in order to make the actions financed by the Erasmus+ programme – and thus co-financed by various other institutions and bodies: regions, consular offices, state services (national education, employment agencies), cities, universities, vocational training organisations, etc. – more effective and efficient. Indeed, as a driving force behind European mobility policies for 30 years, Erasmus+ is the oldest, most extensive and longitudinal programme: it is above all legitimate in questioning the transformation of individuals and systems. By grouping the former programmes (Leonardo, Comenius, etc.), Erasmus+ wanted to spread its philosophy of action and thus not only multiply the number of its beneficiaries, but also permeate the action systems of education and employment. Thus, it asserts itself not as a public expenditure, but as an investment generating tangible and intangible benefits for all – individuals and systems – and contributing to inclusive growth. In this respect, public actors who are the driving force behind other policies and mechanisms for education, training and employment are in turn associated with the impacts (including systemic ones) that they most often generate together. Therefrom rises the challenge of updating the causal chains from investment to the transformation of actions systems and measuring the impact of Erasmus+.

### **An informal approach and an open partnership**

To meet this challenge, the Observatory is first and foremost a process and an informal approach. Its primary function is to capitalise knowledge from different sources: research, observation, evaluations and experimentations. To this end, it brings together, besides the Agency, a range of different actors in mobility including: ministries of national education, research and higher education, labour and employment, regions, universities and rectorates, chambers of commerce and industry, chambers of trades and crafts. This brings a variety of competences, from public policy analysis and research institutes to vocational training and education at all levels.

## **I.2 The situation at this stage**

### **A bouquet of shared indicators**

The Observatory's work led to the definition of a methodological framework based on a stable typology of expected results and impacts of Erasmus+ mobility. The impacts of mobility on learners, staff, organisations and education systems have so far considered European, international, national or sectoral typologies as well as the current indicators. This provides a basis for extending reflection to the more complex actions of the Erasmus+ programme, such as "strategic partnerships".

This work identified 96 indicators. They were examined in the light of four criteria: the relevance of the indicator for the objectives and expected results of the programme, the target audience, the verified or declarative nature of the data, and a priori feasibility. This process led to the selection of 21 indicators out of the identified 96 that were collectively judged to be the most relevant and feasible.

### I.3 Objectives for 2018 and 2019

#### To stabilize common observation tools in 2018 in order to produce necessary and useful knowledge on the impact in 2019

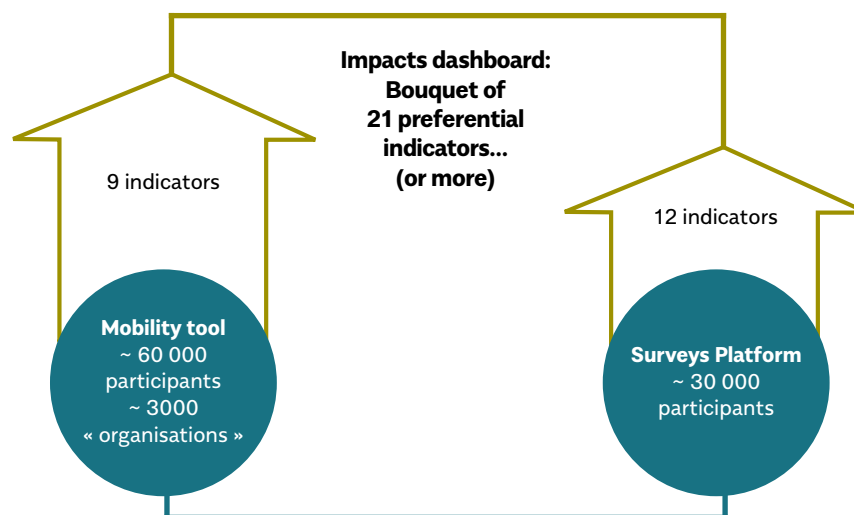
The aim now is to develop tools enabling the Observatory to progressively produce feedback required on the impact of actions financed by Erasmus+. Several options were studied and discussed: on the one hand, it was decided to use relevant data from the “participant reports” stored under the *Mobility tool*<sup>1</sup>. On the other hand, to develop a post-mobility follow-up survey mechanism – which is the most important strategic issue in impact assessment and the deficiency of almost all the studies and evaluations carried out to date.

In the long term, the aims pursued are an exhaustive coverage of the audience through a stable selection of simple impact indicators, fed homogeneously by either existing bases or a common questionnaire. The data and tools are shared within the Observatory’s collective.

#### To undertake the project of designing the system

The desire to use an existing system and data led to take two approaches: at this stage, mainly the use of the *Mobility tool* and then the follow-up surveys. The idea consists in connecting the data of nearly 60,000 annual “participant reports” to a digital platform for generating surveys. Its ambition is to overcome the limitations and constraints of the *Mobility tool* and to reduce barriers hindering the spread of knowledge of impacts to the public. The proposed system would make an “impacts dashboard” accessible to “beneficiaries” (project leaders), who would be able to visualise the results and impacts in real time. This system would make it possible to monitor the participants (after one, three, five years, etc.) and therefore to specify the real and long-term impacts of Erasmus+. It should also be open and compatible with the evaluation systems of other mobility policies.

This is shown in the following diagram:



<sup>1</sup> “Mobility Tool+ is a web platform tool for collaboration, management and reporting for mobility projects under the Lifelong Learning Programme (LLP) and under the Erasmus+ programme of the European Commission. It is developed by the European Commission to be used by the beneficiaries of Erasmus+ Projects managed by Erasmus+ National Agencies” *Mobility Tool+ Guide for Beneficiaries of the Erasmus+ programme*, European Commission, 2014.

## II. Observe to assess the impacts of mobility

### II.1 Responding to evaluation issues

The aim of the Observatory and the survey generation platform project is to meet the Commission's expectations in terms of impact assessment. This issue is currently unevenly shared among stakeholders in mobility support policies, both with regard to the impacts targeted and the type and methods of evaluation. At this stage, it is therefore a question of building up tangible data stocks for some and virtual data stocks for others, which the collective as a whole has recognised as relevant and necessary. The project is therefore based on the information needs of stakeholders. These were determined by the collective and participatory work of impact formulation.

#### **Evaluation matters for the European Commission**

The Erasmus+ programme guide gives the following definition: "Impact is the effect of the activity carried out and its results on people, practices, organisations and systems. Dissemination and exploitation of results can help to maximise the impact of the activities carried out so that they have an impact on immediate participants and partners in the years to come. Benefits to other stakeholders must also be considered in order to make a greater difference and maximise the benefits of the project. This notion is linked to sustainability: 'the project's ability to continue and use its results at the end of the funding period'".

The Communication "Better Regulation" (May 2015) defines impact as follows: "The impact is the change brought about by the policy in question at the systemic level of society and the economy as a whole. This definition takes into account the complexity of a company and the number of external factors that may affect the process. In the context of mobility, for example, the impact of an internship abroad on a young person's professional development depends on many other factors as well, such as the degree he or she holds, the network he or she has developed, etc."

It should be noted that these are ambitious definitions posing strong methodological challenges. Indeed, at this stage, the counterfactual methods resulting from econometrics, confronted with the difficulty of demonstrating the causal chain, aim to evaluate impacts according to a less broad definition: the policy or programme must be limited in time and space – and to a lesser extent be subject to multiple other factors, both internal and external.

#### **Common or distinct evaluation issues for mobility funders**

Evaluation is a necessity for all mobility policy stakeholders. The organisations involved in the Observatory's approach are of various types and purposes, but they have a common motivation: supporting mobility as a factor of employability and professional development. Therefore, the Observatory offers to these stakeholders a common material to be used in their respective study and evaluation work. Whatever the diversity of their policies, objectives and actions, they find themselves globally in a common core set of issues via the Erasmus+ programme. At the same time, the work of defining common indicators made it possible to specify desired impacts.

The Observatory's approach consisted, among other things, in "deconstructing" the expected results and impacts beforehand. This is the first step to precisely define the purpose of the evaluation

and thus identify the impacts targeted by the various partners financing mobility. Hence the identification of indicators – for some common and for others shared between partners – and the criterion for assessing these indicators could perhaps be modulated according to the objectives specific to each partner. This step is the prerequisite for future investigations – counterfactual or according to the theory of action – to establish causal relationships.

Similarly, the exercise led to a re-examination of the formulation of the expected results (see Annex 1): it was observed that the translation in English sometimes leads to the complication of statements, which become ineffective. These, although hidden behind the diversity of the expected results, are some fundamental issues that the programme designers may have perceived as common to the Member States.

From there, each partner of the Observatory has a clear visibility of the common or non-common stakes and can rank and weight them. From the objectives of the programme set by the partners to the indicators and the definition of impact, it is a common evaluation problem that the Observatory conceives.

## II.2 The three impact categories of Erasmus+

An analysis of the expected results of the Erasmus+ programme reveals three categories of impact:

- results in terms of the development of individual skills: **individual potential**;
- results in terms of the evolution of professional skills and knowledge due to training or education received in mobility: **professional attainments**;
- results on recruitment and professional development, and also on **careers and the internationalisation of establishments**.

Three coherent and distinct thematic blocks reflecting different types of results and impacts can be distinguished. They may be reflected in the following diagrams for each of the main audience categories, expressing the **dynamic of training** between the three thematic blocks.

→ **Learner mobility**: the different categories of results and impacts of mobility on learners are the three stages of the same logic of impact.



→ **Staff mobility:** in the same way, staff mobility affects staff on three successive levels; it should be noted that the third level reveals the interaction between staff and pupils on the one hand and schools on the other.



→ For organisations/establishments, the expression of expected results covers three categories of impacts:

- results in terms of modernisation of the organisation, which can be seen in the improvement of the quality of education (or the main activity) on the one hand and a better organisation on the other;
- results in terms of social inclusion, based on good practices that allow for a better positioning of the establishment on the labour market and a better integration of educational work in its societal context;
- results in terms of the internationalisation of institutions, causing greater openness to the world, closer cooperation across borders, as well as better inclusion of international aspects in the educational curriculum.

The new challenge for the Observatory and future impact assessments is to clarify the relevance of these three categories, which at this stage create a consensus. Above all, it is important to analyse the qualitative observation of a chain of impacts and therefore a dynamic between the three types of impacts. The impacts of mobility must be observed over time and no longer at a "t" moment.

### II.3 From expected to observed impacts

An examination of the impacts identified in the evaluations confirms this analytical grid. It provides a matrix for a comprehensive, reasoned approach to impacts. A consensus was reached within the Observatory's collective. Therefore, these impacts by audience type can be summarised as follows.

→ **Learners: employability, condition of employment – what skills for which jobs?**

As observed and developed in preparatory works for the implementation of the French Observatory<sup>2</sup>, the impacts of Erasmus+ on learners are strongly oriented towards the development of employability. This is

<sup>2</sup> *Etude Préable à la création d'un «Observatoire National de l'Impact Erasmus»*, for the Erasmus+ France / Education & Training Agency, by Cabinet E.C.s (Research Director: Arnaud de Champris), February 2016; *Les impacts d'Erasmus+ et des Politiques de Soutien à la Mobilité*, for the Erasmus+ France / Education & Training Agency, by Cabinet E.C.s (Research Director: Arnaud de Champris), February 2016, and other French Observatory publications.

the first type of impact that logically precedes vocational qualification, which in turn conditions access to employment or return to work and professional development. While mobility must consolidate professional skills, it is observed that it also develops “soft skills”: these appear to be the most constant and best shared of the expected results. Many types of soft skills – that sometimes can cross – have been proposed. The “participant report” lists 21 competences: 8 on knowledge and know-how, 8 on personal development and 5 on relational skills (see Annex 1). For ease of reference, they have been retained in this methodology since they are already present in the *Mobility tool* and validated at the program level. Indeed, this range of skills synthesises the other typologies. It could be reduced without losing consistency in the follow-up surveys, which should be as simple as possible.

In terms of language skills, it should be noted that the high demand for mobility in English-speaking countries presupposes a greater prominence of and influence in English in respect of the employability of learners.

→ **Professionals/staff: a return to mobility – a factor of change difficult to measure**

For staff, it is difficult to measure the change generated by mobility. The aim of staff mobility (teachers, trainers, administrative staff) is to improve the international openness of institutions through the acquisition of skills and implementation of good practices. Opening up to the international market also leads to other, more global results, such as the modernisation and better positioning of European establishments in international competition. One of the keys to this is the development of partnerships between European institutions. Among the indirect effects of these changes is the increase in student mobility, which, in turn, has a positive influence on staff mobility. The basic premise is that international and intercultural exchanges contribute to the modernisation of European education.

It is generally accepted that pedagogies are difficult to evaluate. Yet some of the expected results are intended to improve teaching methods. The capacity of mobile staff to generate change does not appear to be objectively measurable. Only the changes effectively implemented through mobility are observable. What is more, the “mobile” employee output depends on several other factors. The international strategies of institutions also depend on local, regional or national policies. They can even only depend on facilitating, inhibiting or blocking factors of various kinds. Isolating the impacts of the Erasmus+ programme in the evolution of an institution through its staff capabilities is a methodological challenge.

→ **Organisations: open institutions for changing education systems**

Modernising and opening of institutions to the international market, as well as improving the capacity of education systems to act for social inclusion and access to employment, are at the heart of the strategic objectives of the Erasmus+ programme, in line with the “2020 Strategy” of the European Union. The following impact is noted:

- the multiplication of mobility ultimately leads to the modernisation and better positioning of European institutions in international competition, and by that to excellence of European education. (Note: the qualification of staff can be considered a guarantee of this excellence; this expected result is therefore an impact both on organisations and individuals.)

To allow for a more relevant measure of impacts, a typology of institutions is proposed according to the role an organisation plays in international mobility, and not according to its status:

- prescribers (e.g. employment agencies);
- co-founders (e.g. regions);



- operators (e.g. training centres, companies, chambers of trade, organisations that send and receive people on the move);
- third parties or “intermediaries” (organisations that link mobility operators and organisers, as well as make links between various players).

## II.4 Methodological challenge

The main lesson of this analytical grid is that access to employment and professional development is a combined effect of physical mobility and cultural openness. This seems to apply to all audiences and all sectors of activity. However, it is not demonstrated or weighted by any audience, industry sector or territory.

The problem of the “horizontal” (within the same cycle) or “vertical” (inter-cycle) relationship between mobility and career should be examined in greater depth. The “horizontal” relationship between foreign experience (studies and internships) and working abroad or in an international context was observed to be strong. The “vertical” relationship between overseas experience and positive career development is not demonstrated. The methodologies used at this stage have not been able to reduce or control the biases influencing the causal relationship linked to the sector of activity, the types of qualifications and qualifications at the outset, or the social background of origin.

In short, the occurrence of the impacts in the long term and their post-mobility sustainability are the real criteria for assessing impact.

Moreover, since the level of qualifications and diplomas is a strong factor in access to employment, the contribution of mobility in this respect should be better analysed. Additionally, the European comparison among all Erasmus+ partner countries is an unresolved methodological problem at this stage. It should be possible to make this comparison by type of mobility and by type of audience.

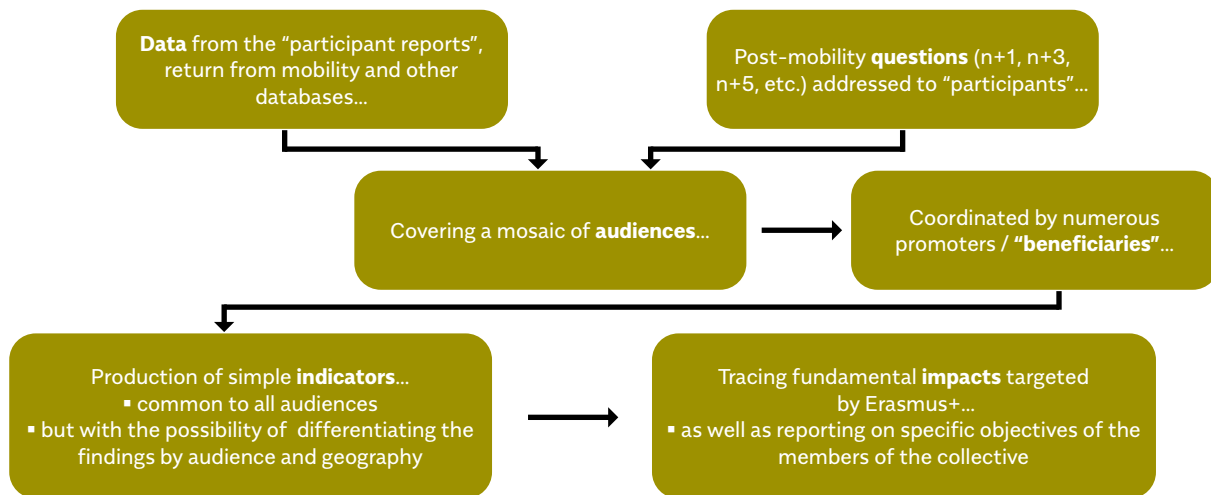
To this day, the existing studies’ limits, pitfalls and deadlocks stem from the fact that what is lacking among the studies and surveys carried out in France is a global analysis of pathways to employment including the mobility criterion and the sub-criteria of mobility type and destination. At this stage, the greatest methodological challenge is, therefore, to have the furthest possible post-mobility follow-up.

## III. Methodology

### III.1 Implementation of the evaluation system of the impacts of Erasmus+ mobility

To respond to the evaluation issues, the Observatory organises its methodological framework as follows. The diagram below shows the flow from data to impacts and vice versa. It is a simplified methodological framework for observing impacts. Below, the two sources are highlighted: first, the “participant report” or the “final report” for the organisations and, second, the follow-up questionnaires sent to “participants” according to a frequency to be defined. This underlines the continuity of the process and the need to ensure consistency between the two tools: target population, formulation of questions and items, etc. Likewise, it is necessary to consider the circulation of data between the “participants”, the “beneficiaries”, i.e. the project promoters who have the exclusive right to contact the previous ones, and the Agency, which knows only the organisations carrying out the project.





At the end of the process there are simple indicators, which can report the same typology of impacts for all types of audiences.

#### → Complexity underlying simplicity

The challenge, however, is to capture and report on the diversity of the real impacts for each audience. It will be of little use to give the average period of access to employment for all Erasmus mobility participants every year. The aim of indicators is to reflect the situation of each audience individually, as well as in relation to other audiences and the general average: apprentices versus students or job seekers, for example. And under these broad categories, it is necessary to identify specific sub-groups according to sector, diploma, qualification and other discriminating criteria, as well as by geography (regions, metropolitan areas, cities). It is, therefore, in the Observatory's capacity to characterise the usefulness for both the programme and those involved in mobility support policies. In this respect, the "beneficiaries", numbering nearly 3,500, are at the heart of the functioning and management of this evaluation system.

### III.2 The central function of project promoters

The 3,000 to 3,500 organisations that annually submit mobility projects to the Agency, the "beneficiaries", constitute a central element in the production and circulation of the Observatory's data. Only they are in contact with the people participating in mobility, the "participants", the final beneficiaries of program grants. As contributors to the Observatory in terms of data, they will also be its users, having access to its productions.

At this stage, they have a dual role consisting in:

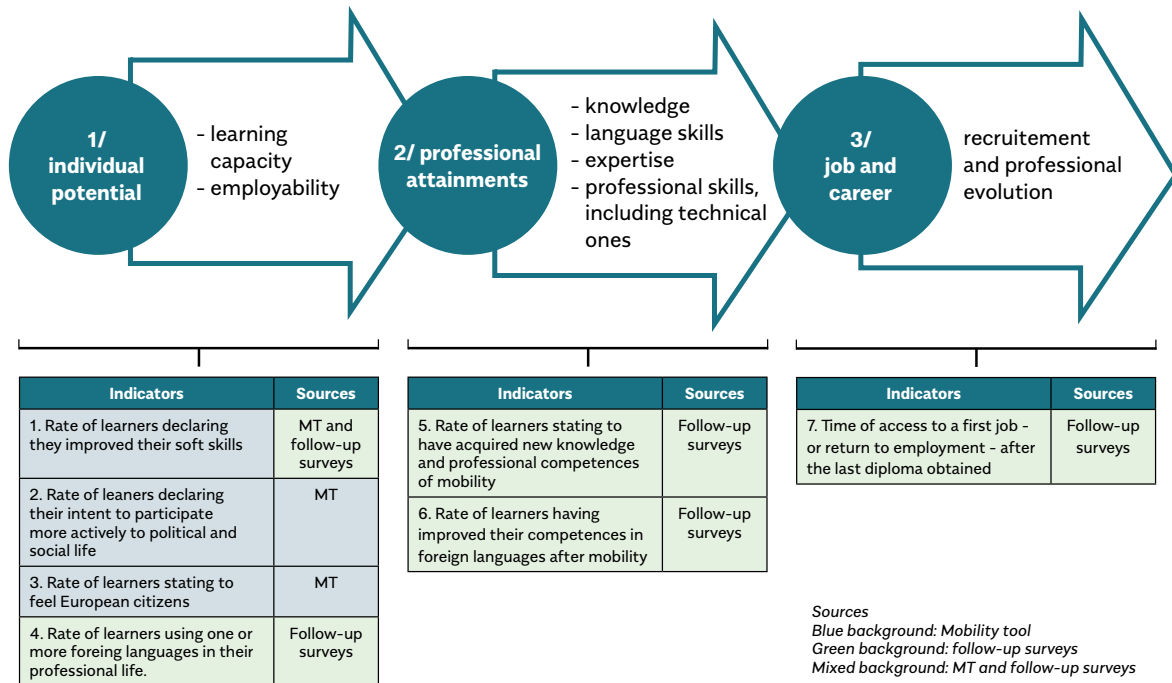
- monitoring and controlling the content of the participants' reports; indeed, the reliability of the indicators depends on the quality of the data itself determined by the sincerity and application of the participants in return for mobility;
- contributing to the precise characterisation of the target groups so as to make it possible to compare the structure of the reference population ( $\pm 60,000$ ) with the follow-up cohort ( $\pm 30,000$ )

who have agreed to be contacted again for survey purposes), and thus ensure the reliability of this cohort, whose importance will necessarily vary as follow-up surveys are carried out.

### III.3 The set of 21 impact indicators

Below, we present the indicators selected at this stage and the source of their data together with the results expected according to the program. Let us recall that these indicators stem from the choice of the collective of the Observatory according to the principal criteria of their feasibility and their shared relevance. This relevance necessarily does not appear at year “n” for each audience, but in the long term. The system will make it possible to draw up “zero items” or values of reference of unequal utility for the actors of the mobility, but necessary for the comprehension of the dynamic and the variations with “n+”, which will be useful for the evaluation of impact of the various policies of mobility.

→ **Seven core indicators for learners**



→ **Nine core indicators for staff**



Indicators	Sources	Indicators	Sources	Indicators	Sources
8. Rate of participants having stated to have developed a co-operation with actors of job market	MT part 3 of 4	11. Rate of participants stating to have improved their practice of English or of the language of the host country	MT part 3 of 4 follow-up surveys	14. Rate of participants stating to have received at least a kind of recognition following their mobility from their organization	MT part 4 of 5
9. Rate of participants having stated to have reinforced or have widened their network personal or developed new contacts	MT	12. Rate of participants having modified their methods of teaching or their professional practices	follow-up surveys	15. Rate of participants having declared that their mobility will contribute to the internationalization of their organization	MT
10. Rate of participants having acquired team work skills	MT and follow-up surveys	13. Rate of diffusion of new professional practices within the establishment	follow-up surveys	16. Rate of reiteration of mobility among staffs	follow-up surveys

→ **Five core indicators for institutions/organisations**

MODERNISATION		SOCIAL INCLUSION		INTERNATIONALISATION	
Indicators	Sources	Indicators	Sources	Indicators	Sources
17. Rate of new contacts/ networks created by mobile staff	Follow-up surveys	18. Rate of companies (economic actors) accommodating mobility	Follow-up surveys	19. Rate of organizations developing a formal approach of internationalization	Follow-up surveys
				20. Rate of organizations stating to have strongly increased their capacity to cooperate at the European/international level	Follow-up surveys
				21. Share of Erasmus+ in the financing of the international mobility	Follow-up surveys

Sources  
 Blue background: Mobility tool  
 Green background: follow-up surveys  
 Mixed background: MT and follow-up surveys

→ **A framework to reinforce the complementarity of tools**

Experimenting with the implementation of this first selection of indicators should ensure consistency between the starting population – the ±60,000 participants in year “y” – and the subsequent longitudinal survey, based on the ±30,000 respondents who agreed to be contacted again for survey purposes and who constitute a large monitoring cohort.

Twelve indicators are included in the follow-up surveys, six come directly from the *Mobility tool* and three will be taken from it in the follow-up surveys. Hence the need for a common framework for these two tools constituting the same observation system. This approach is therefore intended to be integrated.

→ **“Impacts dashboard”, a digital tool to guarantee the consistent functionality of both data collection and processing.**

The implementation of the Observatory around these two operating modes calls for ensuring their coherence, in other words for neutralising the biases induced by this double functioning and the distribution of indicators between the two. Thus, both populations must have the same structure: the population of the follow-up surveys must have the same characteristics as the reference population recorded in the *Mobility tool*. This operation can be guaranteed, as well as facilitated and fluidised, by a digital tool: one or more APIs<sup>3</sup> which link the reconstructed bases or a simple information system feeding the 21 indicators selected at this stage from these two different collection methods. These indicators are displayed in real time on a dashboard designed according to possible and planned requests by the Observatory. This “dashboard” will present the digital ergonomics of the Observatory and will be likely to be under controlled access and limited to members of the collective and beneficiaries.

→ **A stable and sustainable framework open to future developments**

Issues will surely appear. The aim of the system is to enable the integration of new indicators, by inserting new questions or items in the survey questionnaires, by mobilising new data within the *Mobility tool* or by drawing data from other silos to which it would be connected. Indeed, the gradual interoperability of information systems makes it possible to contemplate these developments. The bouquet of 21 indicators is today the core of an expanding system.

→ **And perhaps a methodological gateway to counterfactual investigations**

The Observatory should be able to be linked to databases of employment (or demand for employment), and thus be in position to measure the impact of mobility on access or return to employment compared to the population that has not benefited from mobility. This would be the most convincing form of impact assessment.

### III.4 Two modes of data collection

#### A simple and complex causality

Impact cannot be seen only as a fact occurring at a “t” moment. Particularly in the case of the mobility of the Erasmus+ programme, impact is the product of maturation, i.e. a duration and a dynamic. Linking the year “y” of the *Mobility tool* with follow-up surveys in “y+1”, “y+3” and “y+5”, for example, should make it possible to trace changes, particularly the professional development of participants – learners or staff – and to identify the appearance of immediate or delayed effects of mobility. This combination of “static” and “dynamic” indicators makes it possible to compare several situations that are out of step over time. It also highlights the concomitance and perhaps coincidence of a few factors interacting on the

<sup>3</sup> Application Programming Interface

production of the impact. For example, recruitment will not only be the result of mobility carried out two years earlier, but also of cross-disciplinary skills that were developed throughout these two post-mobility years, and therefore it will not be identified by existing surveys to date.

If the Observatory essentially bases its analysis on statistics and therefore on a quantitative approach, its productions will offer a practical material for qualitative analyses. They will be able to explore, apart from the raw impacts, the complexity of correlations and causalities.

### III.5 Characterising the audiences

Indicators are not sufficient to respond to the evaluation issues; the analysis of their results will be successful if a fine and precise characterisation grid of the audiences responding to follow-up surveys is used. At this stage, we can envision observation in two fields of a different nature.

#### → First field of observation: globalised audiences in a wide web

The first indicators relevant to the *Mobility tool* will be filtered through the current grid in this database. The *Mobility tool* categories are those of mobility types.

Higher education	Vocational training	School	Professors/ teachers	Adults (vocational rehabilitation) ~500/year
Study	Learners		Participant groups	
Internship	In-company training			
Teaching	Training			
Training (administrative and teaching)	Teaching			
	- In teaching			
	- In training			

This grid does not allow for an impact assessment, since the determinants of impact will be very different between these five categories of audience, as well as between their sub-groups. However, it is important to keep traceability of the types of mobility carried out throughout the monitoring process.

#### → Second field of observation: differentiated audiences in a small web

The follow-up surveys will present a fine identification grid of respondents, covering the education or training curriculum, diplomas and years of achievement, professional development (also dated), sectors of activity, etc. The surveys will be based on a detailed list of respondents.

It should be noted that a geographical approach is possible in the *Mobility tool*; follow-up surveys should confirm the geographic characterisation of respondents and monitor their mobility.

The aim is to cross-check types of mobility with the detailed typology of the public in order to systematically link actions financed by Erasmus+ to the individual developments of the final beneficiaries or to the evolution of the establishments in relation to the program's objectives. This

leads to the involvement of project leaders, who are primarily interested in knowing the evolution of their audiences.

### III.6 Follow-up questionnaires

Three simple and short questionnaires feed the monitoring indicators. The questions are formulated following the formulation of indicators. They will be administered directly to the ±30,000 participants (27,791 in 2015) through the digital survey platform. The impacts of mobility are expected to be felt within this five-year timeframe, all audiences included. Moreover, it seems unrealistic to have a significant response rate beyond that. Below are the proposed questionnaires.

#### → **The learner questionnaire**

##### 1. Indicator 1

*Did your mobility improve any of the following skills?*

*List to be formalised in accordance with Annex 1*

##### 2. Indicator 4

*Since your return from mobility, have you been using one or more foreign languages in your professional environment?*

*OR Are you in contact with people of different nationalities?*

##### 3. Indicator 5

*Has your mobility enabled you to acquire new knowledge or skills related to your professional activity?*

##### 4. Indicator 6

*Has your mobility improved your English practice? Or that of the language of the host country?*

##### 5. Indicator 7

*When you got back from your mobility, how many months did it take you to...*

*- find your first job?*

*- find a new job?*

*- move to a higher position?*

*- obtain a training?*

#### → **The staff questionnaire**

##### 1. Indicator 10

*Have you been working more as a team since your return from mobility?*

##### 2. Indicator 11

*Do you maintain your fluency in English or the language of the host country?*

##### 3. Indicator 12

*Have your teaching methods and/or professional practices evolved since returning from mobility?*

*If so, when?*

*Is this evolution due to your mobility?*

##### 4. Indicator 13

*Have new teaching methods and/or professional practices linked to your mobility been disseminated within your institution?*

## 5. Indicator 16

*Have you partaken in new professional mobility?*

→ **The organisation questionnaire**

## 1. Indicator 17

*Did your mobility enable you to make new contacts and integrate new networks? How many contacts? How many networks?*

## 2. Indicator 18

*In the current academic year, how many companies have welcomed mobility trainees?*

*OR How many new partnerships have companies created?*

*How many new companies are moving their apprentices?*

*What types of actors mobilise your strategic partnership?*

*How many new partnerships have companies created?*

## 3. Indicator 19

*Is your institution/organisation in a formal process of internationalisation?*

*OR Is your establishment project at the origin of mobility?*

## 4. Indicator 20

*What new forms of cooperation have you been able to set up thanks to the mobility of your staff?*

*Within Erasmus+?*

*Excluding Erasmus+?*

## 5. Indicator 21

*Specify the share of Erasmus+ in the financing of your international mobility projects?*

*OR Specify the percentage share of Erasmus+ in the financing of all your international mobility projects, including Erasmus+?*

## IV. Conclusion: a follow-up evaluation possible today

The methodological framework of the Observatory of the Erasmus+ Impact presented in this article is the fruit of a collective reflection of mobility actors on the initiative, under the aegis of the Erasmus+ France / Education & Training Agency: it synthesises the initial consensus. However, this methodological framework remains open to issues, expectations and stakes that it was not possible to take into account at this stage. It is the core of a light monitoring and evaluation system that aims to meet tomorrow's growing demand from mobility funders, first and foremost from the European Union. Verifying the relevance and added value of their funding in relation to their objectives of asset qualification and employment development became crucial. A requirement that results in an evaluation injunction to which public policy evaluation practices, methods and tools must respond.

This work, which is based on the capitalisation of a large number of studies and evaluations and the sharing of a few European experiences, led to the selection of indicators whose number was then divided by five. In the end, only a limited set of knowledge objectives have been retained which are, however, essential and common to all. On the other hand, this work validates a determining objective: to include observation in the dynamics of impact generation, i.e. in post-mobility duration. This naturally leads to a search of digital technologies, an operational response that guarantees the effectiveness of observation without over-investment of resources and time for the actors or redundancy in respect of existing



survey systems. On the contrary – it would make them interoperable in the long term while respecting the specific objectives and constraints of the organisations. Hence the project outlined here, which now needs to mature.

## V. Annex

### Annex 1 – Soft skills questionnaire proposed by the *Mobility tool* / “participant report”

#### *During mobility*

- ability to analyse logically and draw conclusions (analytical competences)
- ability to find solutions in difficult or stimulative contexts (competences of resolution of problems)
- ability to plan and learn independently
- ability to use the Internet, social networks and the data-processing environment for my studies, my work and my personal activities
- ability to develop an idea and to put it into practice
- ability to apprehend the values of different cultures
- ability to cooperate in a team
- ability to plan and organise tasks and activities
- ability to express myself in a creative way

#### *After mobility*

- self-confidence (I am more trustworthy and am convinced of my capabilities)
- auto-evaluation (I know my strong suits and my weaknesses better)
- adaptability (I am more able to adapt to and act in new situations)
- critical spirit (I am more able to think and analyse in a critical way)
- tolerance (I am more tolerant with respect to the values and behaviours of others)
- curiosity (I am more open and interested in new challenges to take up)
- participatory citizen (I intend to take a more active part in the political and social life of my community)
- open-minded (I am more interested in what occurs in the world)
- aptitude to decide (I am more able to make decisions)
- inter-cultural cooperation (I am more able to cooperate with people of different views and cultures)
- interest in Europe (I am more interested in subjects concerning Europe)
- feeling of European identity (I feel more European)
- citizenship (I am more open to social and political concepts such as democracy, justice, equality, citizenship and civic rights)
- professional progress (I have improved my competences in my specific field)

# Tracer study of mobility participants: students in higher education. Methodology and the results of the pilot study.

By Joanna Dąbrowska-Resiak

## Abstract

In 2017 the Foundation for the Development of the Education System in Poland launched a new study on the professional and educational career of graduates who participated in mobility under the Erasmus programme during their studies. The article presents research rationale and methodology as well as results of the pilot study, with regard to employability and professional development of graduates and their situation on the labour market.

## Research rationale

In all European countries, people with an academic education have a much better chance of employment than those who completed education at a lower level. In the group of OECD countries, on average 84% of people with a higher education degree find employment. Secondary education reduces the chances of having a job to 75% while a lower education level reduces them to 57%. In Poland, the relevant indicators are 88%, 68% and 41% and show an even greater discriminatory power of education (OECD, 2017). At the same time, employability plays a key role in the European Commission's higher education reform strategy (European Commission, 2011), as well as in the Europe 2020 strategy (European Commission, 2010) and Education and Training 2020 Strategy (The Council of the European Union, 2009).

Since the collapse of the communist system in Poland, an educational boom has been observed, which strongly affects the position of university graduates on the labour market. The Gross Enrolment Index (GEI) was 9.8% in 1990 (Ministry of Science and Higher Education, 2013) and reached 36.8% in 2016 (Central Statistical Office, 2017). Such a significant increase in the number of young people with a higher education degree translates into changes in the situation of graduates on the labour market and their employability in respective years.

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## KEYWORDS

ERASMUS, STUDENT MOBILITY, RESEARCH, TRACER STUDY, PROFESSIONAL CAREER OF GRADUATES, EMPLOYABILITY

Although the sharp increase in the number of students after 1990 is treated as a specifically Polish trend, such increasing tendencies in the number of students are also recorded in other European countries, which suggests that the educational boom – despite differences in pace and scale – has similar sources across the EU (Eurostat, 2009).

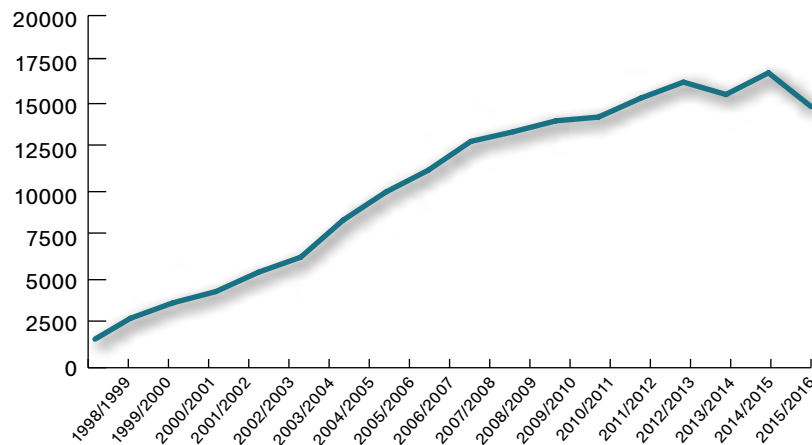
In Poland, various studies are currently being conducted on the career paths of graduates, both central and decentralised (conducted by HEIs and research institutes). The Polish Graduate Tracking System (<http://ela.nauka.gov.pl/>) is implemented by the Ministry of Science and Higher Education and developed by the University of Warsaw (PEJK, [www.pejk.uw.edu.pl](http://www.pejk.uw.edu.pl)). In this study administrative data is used, which makes the project innovative on a European scale. Other important national research projects that indirectly collect data on university graduates are: Research on Economic Activity of Population and Household Budget Research carried out by the Central Statistical Office, as well as the Human Capital in Poland project (BKL, [www.bkl.parp.gov.pl](http://www.bkl.parp.gov.pl)) carried out by the Polish Agency for Enterprise Development and the Centre for Evaluation and Analysis of Public Policies of the Jagiellonian University.

It is worth noting, however, that research on further career paths of HEI graduates in Poland does not always take into account thematic areas related to the foreign mobility of students. At the same time this area is treated by educational authorities as an important element of the period of studies, both in terms of the quality of education and the employability of graduates. Yet there is no comprehensive data on credit mobility available from Eurostat/UOE except for statistics on Erasmus+ student participation (Eurydice, 2016). According to this data, the average mobility participation rate in Erasmus+ in EU countries in the academic year 2013/2014 was 1.3%, with only two countries (Luxembourg and Liechtenstein) exceeding 3%. In 2016 the European Commission adopted the New Skills Agenda for Europe, aiming, among others, to improve information and understanding of trends and patterns in demands for skills and jobs, with Graduate Tracking as one of the key actions to undertake.

## Student mobility under the Erasmus programme

The most important student mobility program in Poland is Erasmus. Since Poland joined the program in 1998, over 200,000 Polish students took part in mobility to complete their period of studies abroad or to participate in a traineeship. Since 2009 the average number of mobility per year amounts to 11,000 studies abroad and 3,500 traineeships.

Figure 1 : Student mobility numbers under the Erasmus and Erasmus+ programmes in Poland (outgoing) in 1998–2015.



Source: Polish National Agency of the Erasmus+ Programme data.

The Foundation for the Development of the Education System is the Polish National Agency of the Erasmus+ Programme. This institution, operating since 1993, has been established to manage several European educational programs. In 2007–2013 it was the National Agency of the Lifelong Learning Programme (Erasmus, Leonardo da Vinci, Comenius and Grundtvig) and the Youth in Action Programme in Poland.

The National Agency collects and analyses data gained from participants' reports which students complete after the end of their foreign mobility. Analytical reports for individual years have been published in Polish, intended for domestic recipients (e.g. Członkowska-Naumiuk, M. 2001–2015). So far, however, there has been no systematic research on the further educational and professional career of students participating in Erasmus.

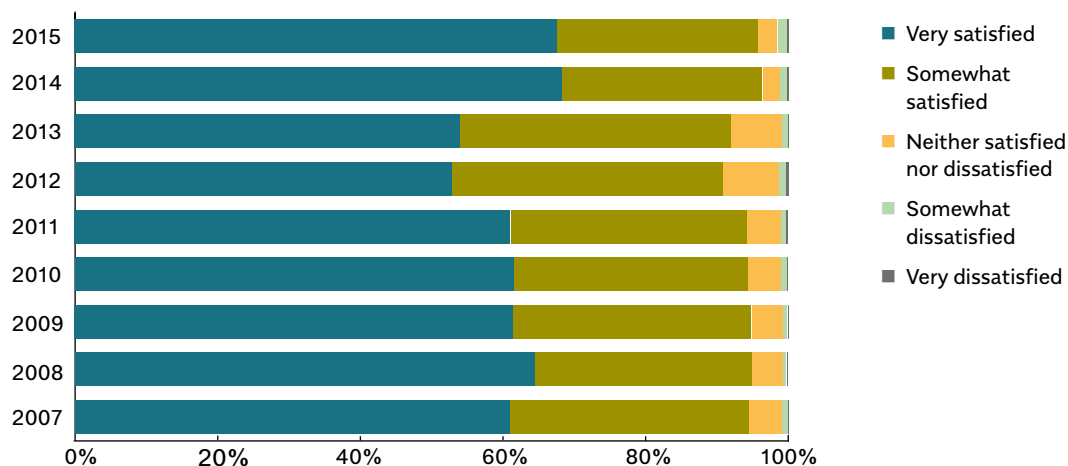
## Participant report analysis<sup>1</sup>

All participants of mobility under the Erasmus programme are obliged to complete the participant report at the end of their mobility period. Those reports are standardised and identical for all respondents in a given year. Despite changes in the questionnaire, the main thematic areas remain the same, e.g. satisfaction with mobility, language competences or administrative issues. One of the most important thematic areas is expected impact on the student's future professional career.

Data from 2007–2015 indicates that the vast majority of students declared very high satisfaction with their mobility. Every year over 90% of respondents claim that they are satisfied (completely or to some extent) with their mobility period and this high satisfaction refers both to studies and traineeships.

<sup>1</sup> Participant report analysis was conducted by the Foundation for the Development of the Education System in 2017 and encompasses analysis of reports from 2007–2015, in total 119,695 individual reports.

Figure 2: Overall satisfaction with mobility, outgoing students in 2007–2015.



Source: Polish National Agency of the Erasmus+ Programme data.

Participant reports are completed shortly after finishing foreign mobility, which makes it impossible to assess the actual impact that mobility has had on participants’ professional development. It is worth noticing that students are asked about expected impact in these areas. The results can be interesting in terms of assessing satisfaction with the mobility in a more specific sense, connected with students’ plans for the future.

The vast majority (84.9%) of students expect that their Erasmus experience will help them in their future career. More specifically, 79.9% of students think that it will help them to get their first job. Nearly all students participating in mobility under the Erasmus programme feel that their Erasmus experience has encouraged them to consider working abroad.

Figure 3: Percentage of students who feel encouraged to consider working in another European country after graduation, as a result of their Erasmus experience.

	2007	2008	2009	2010	2011	2012	2013	2014	2015
<b>studies</b>	92.3%	91.4%	92.6%	92.5%	93.3%	93.8%	92.4%	90.4%	91.2%
<b>traineeships</b>	94.3%	94%	93.2%	95.4%	94.9%	94.4%	95.9%	92.8%	92.8%

Source: Polish National Agency of the Erasmus+ Programme data

## Methodology of the tracer study

TSGE – the tracer study of HEI graduates participating in mobility under the Erasmus programme – was launched by the Foundation for the Development of the Education System in 2017. It is a study of graduates who participated in the Erasmus and Erasmus+ programmes during their studies in 2007–2015. Its aim is to trace the professional, educational and personal development of young people entering the labour market in subsequent years. In 2017 the pilot study was completed. Its results are

discussed further in this article. The first phase of TSGE was launched in 2017/2018 and its results are planned to be published in Q3 2018.

The study group comprises graduates of higher education institutions who participated in educational mobility within the Erasmus programme in 2007–2015. The group is very diverse in terms of age, profile of education and type of HEI graduated. There are no limitations for any Polish HEI to participate in the Erasmus programme, and most of them join it. This makes the study group representative for the Polish student population. At the same time, diversity within the study group allows to capture various factors influencing the school-to-work transition.

The methodology of TSGE is quantitative. It combines two research approaches: a tracking study, which is a type of cross-sectional study, and a panel study, which is one of the longitudinal research methods. The methodology involves repeated measurements using the same or similar measurement tools among the same group of respondents at regular intervals. This allows, on the one hand, to cover further groups of graduates each year and, on the other hand, to track changes in the career, attitudes and opinions of previously recruited respondents. The data obtained this way makes it possible to follow the dynamics of changes in a given group and identify the cause and effect mechanisms related to the observed phenomena.

The research technique used in this study is an online survey (CAWI). The questionnaire was sent via e-mail to mobility participants who agreed to leave their contact e-mail while completing their participant report<sup>2</sup>. In following years, the measurement will be repeated among this group of participants, which will make it possible to capture the dynamics of changes in their life as well as their educational and professional situation. The measurement will be repeated one year and three years after graduation. The questionnaire will also be sent to subsequent cohorts of students participating in foreign studies and internships in the Erasmus+ programme in the following years.

## Main research areas

TSGE focuses on analysing how students in Poland deal with the transition from school to work. Its main thematic areas are: the most important trends related to starting a career and continuing it, as well as the expectations of students regarding their professional career and satisfaction with their first jobs. TSGE also aims to identify the factors that increase the chances of a graduate on the labour market. With regard to academic education, the study examines to what extent (and at which ISCED level) students perceive academic education as an important factor in their further professional career. Other important questions concern how students increase their chances on the labour market, what kind of skills they have and what kind of skills they need. Due to the fact that all respondents participated in mobility under the Erasmus programme, a separate thread of the analysis is connected to the assessment of the mobility impact on professional, academic and personal development (including the impact of the mobility on the development of soft skills).

The main thematic areas of TSGE and key questions within them are as follows:

<sup>2</sup> Nearly all students agreed to leave a contact e-mail in their participant report.

→ **Education and lifelong learning**

- Do students continue their studies at the next ISCED level (MA/PhD)?
- Do they plan to follow an academic career?
- Do students change their fields of study and why?
- To what extent does mobility affect their decision to continue academic education?
- Do they participate in trainings, courses or professional development after they graduate?
- To what extent do studies prepare students to enter the labour market?

→ **Mobility under the Erasmus programme**

- Is mobility (foreign studies and/or traineeships under the Erasmus programme) useful for students? If so, what competences did they develop during their mobility?
- How do they assess the role of mobility in their career path?

→ **Professional competences, soft skills, foreign languages**

- What are the most important competences required of graduates starting a professional career? Are Polish students satisfied with their level of competences?
- Do graduates speak foreign languages? On what level?

→ **Transition from education to the labour market**

- How does the transition from academic education to the labour market change in subsequent years?
- How do students look for their first permanent job? What methods of finding a job do they use? How long does it take them to find their first job?

→ **Professional career**

- What do students think of their jobs? Are they satisfied? If not, why?
- What kind of job do they want to have? Which aspects of their work are satisfactory and which are not?

## Pilot study results. Employability and professional development of graduates.

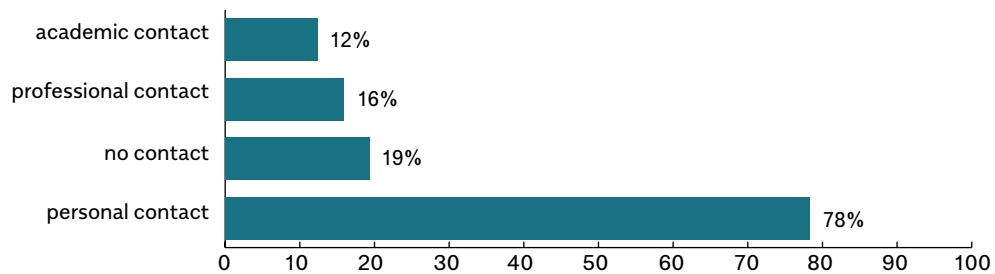
In the summer of 2017 a pilot study of TSGE was carried out in order to test the proposed methodology and questionnaire. The online survey (CAWI) addressed a random sample of graduates who participated in mobility (study period and/or traineeships) in different years. 173 questionnaires were filled in out of a 3,000 study sample, which amounts to a 5.8% response rate. The results of the pilot study provide a first insight into the professional career of mobility participants and their transition from school to work.<sup>3</sup>

Answers show that students are very satisfied with their foreign mobility. Over 90% of respondents declare that if they could, they would definitely go again to the same country and the same university (or – in the case of traineeships – to the same institution).

<sup>3</sup> However, as the pilot study sample was limited, it was impossible to carry out more complex analyses. They will be delivered with the main study results.

After the mobility, eight out of ten students maintain contact with people they met abroad. Mostly these are friendly and personal relations, but nearly 16% of graduates also maintain professional contacts, and 12% academic contacts.

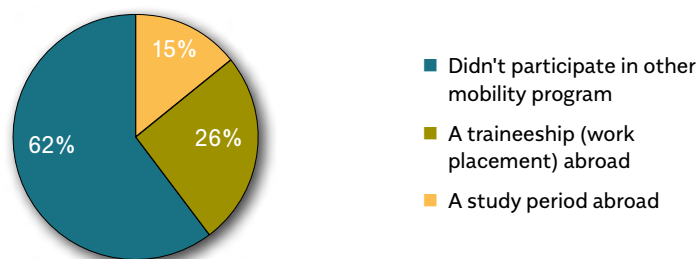
**Figure 4: Percentage of students maintaining contacts with people they met during mobility.**



Source: Pilot survey results, N = 170.

Erasmus is the most popular programme for student mobility in Poland and the majority of graduates who participated in mobility under this programme did not participate in any other mobility programmes that are available for them. 60% of those who participated in the Erasmus programme didn't participate in any other foreign mobility under other programmes. Students who decided on another mobility period abroad under other mobility programmes more often decided on a traineeship (26%) than on a study period (14%).

**Figure 5: Participation in student mobility programmes (other than Erasmus)**

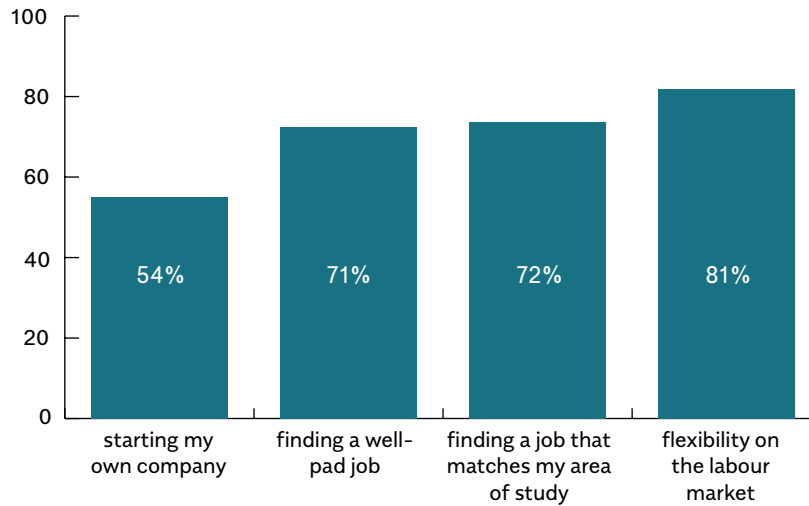


Source: Pilot survey results, N = 170.

Graduates are generally satisfied with career-related aspects of their studies. Respondents say that the studies prepared them rather well for their future careers, especially in terms of performing various tasks, taking different jobs and flexibility in the labour market. Nearly 81% of respondents supported this statement. Graduates generally agree that they are able to find a job that matches their area of study (72.4%) as well as get a well-paid job (71.2%). They are least optimistic about their entrepreneurial skills. Slightly more than half of them confirm that thanks to their studies they are able to start their own company.



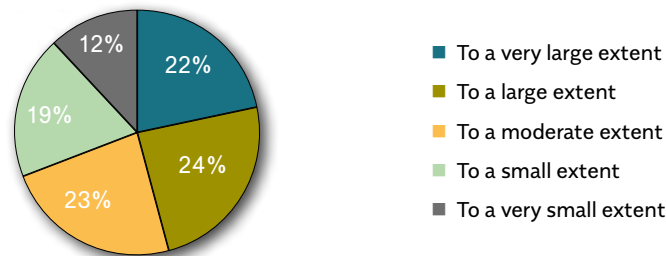
Figure 6: Percentage of students claiming that their studies are helpful in their professional career.



Source: Pilot survey results, N = 170.

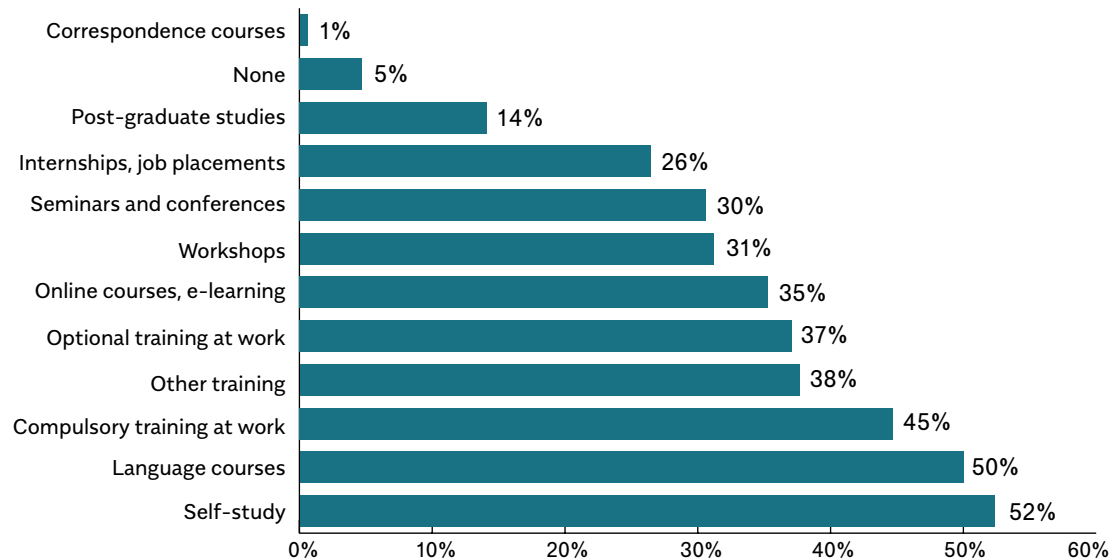
However, when it comes to the job that graduates already have, it turns out that skills and knowledge they obtained during their studies are not always useful in their professional career. 46% of respondents use such skills and knowledge to a large or very large extent, but at the same time 31% of graduates use them to a small or very small extent.

Figure 7: Extent to which graduates use skills and knowledge gained during their studies in their everyday work.



Source: Pilot survey results, N = 137.

In this context it is important to underline that nearly all graduates claim that they continue learning after graduation (in any form or within formal, non-formal or informal learning). Only 4.7% of respondents said that they hadn't participated in any education since finishing their studies. The most important forms of learning encompass self-study (52.4%) and attending language courses (50%). A large group of respondents also participates in training at work, both compulsory and optional (respectively – 44.7% and 37.1%).

**Figure 8: Lifelong learning activities undertaken by respondents.**

Source: Pilot survey results, N = 170.

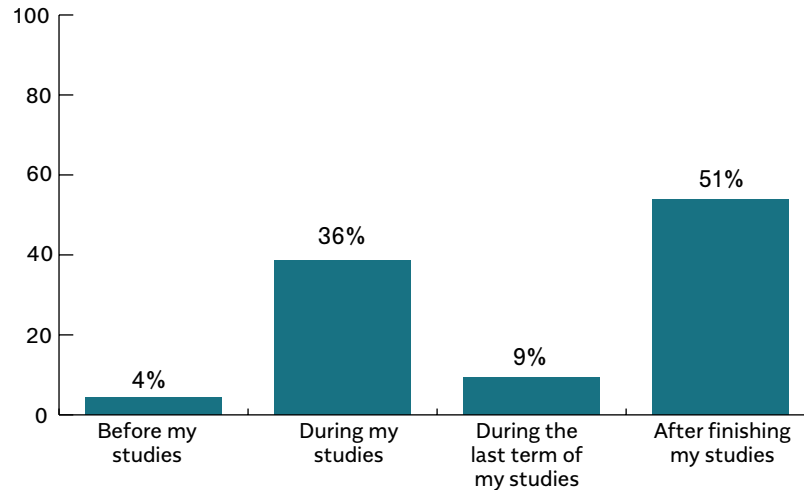
Many graduates declare that they started a professional career before graduation. Over 79% of respondents took part in traineeships or work placements while studying. What is more, a vast majority of graduates claim that they started working before graduation.

Only 20% of graduates said that they didn't do any work-related activity during their studies. Nearly 53% of graduates worked during summer holidays and 55% of them also worked during the academic year. What is particularly important, almost 2/3 of those graduates who took up any kind of work while studying declared that their work was related to their field of study.

Moreover, graduates claim not only that they had a part-time job during their studies but also that they worked full-time. In total, 45.2% of respondents started their first full-time job before graduation. Nearly 9% of graduates started working full-time during their last term of studies<sup>4</sup> and 36% even earlier. Half of the respondents started their first full-time job after graduation.

<sup>4</sup> Usually, the last term of studies is dedicated to preparing a thesis, which also means fewer lectures and, in consequence, the possibility to start working.

**Figure 9: Moment of starting their first full-time job.**

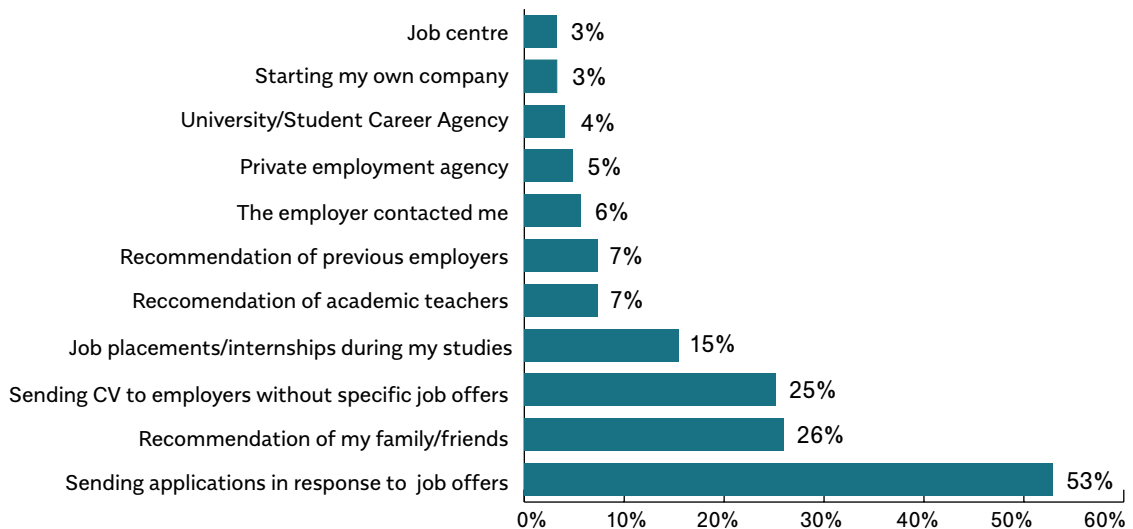


Source: Pilot survey results, N = 124.

The most common way of finding a first full-time job is sending out job applications – this method was used by 52.9% of respondents. It is similar to the third most popular way of job searching, i.e. sending applications to selected employers without a specific job offer, which proved helpful for 25% of respondents. The second most effective method of finding a full-time job, different from the two above-mentioned ones, is being recommended for a position by family and/or friends, which was mentioned by 26% of graduates.

The average time required to find the first full-time job was over 2 months. However, nearly 31% of graduates claim that it took them less than a month to find their first job, which means that some respondents in this group didn't have to search for their first job at all. The longest periods of looking for a first full-time job were 18 and 24 months – each mentioned by only one respondent. 43% of graduates claim that they looked for their first full-time job for a period not exceeding 2 months.

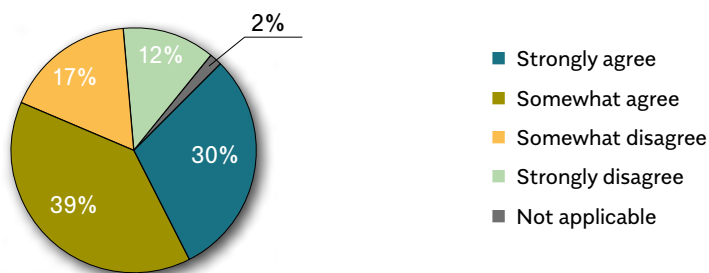
**Figure 10: First full-time job search sources.**



Source: Pilot survey results, N = 123.

While looking for their first full-time job, nearly 80% of graduates underlined their Erasmus experience in the recruitment process – either in their curriculum vitae or in the cover letter. Respondents who found their first permanent job after returning from a mobility period agree that participation in the Erasmus programme helped them during the recruitment for their first full-time job – 30% of them agree with this strongly, and 39% – to some extent.

Figure 11: Percentage of students who claim that their Erasmus experience helped them get their first full-time job.

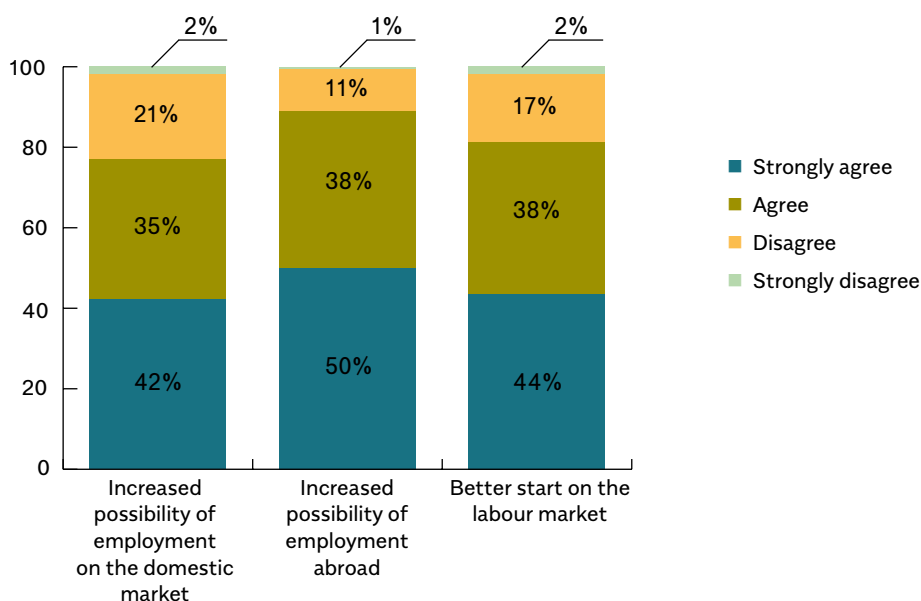


Source: Pilot survey results, N = 123.

Graduates believe that mobility in general is an opportunity to enhance students' position on the labour market – 81% of respondents agree (strongly or to some extent) that mobility experience may help those students who enter the labour market.

Interestingly, a slightly larger group of respondents recognise that mobility experience is more important when looking for a job abroad than in Poland – 89% of respondents agree that their Erasmus experience helps find employment abroad while 77% agree that it has the same impact in Poland.

Figure 12: Mobility impact on future career (in general).



Source: Pilot survey results, N = 170.

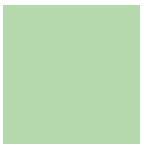
## Conclusions

- Tracking the career of graduates is an important research activity as it helps reflect on education trends and on changes in the labour market. Such information is important to various stakeholders – educational authorities, educational institutions, enterprises and individuals (students, lecturers, etc.).
- The tracer study (TSGE) conducted by the Foundation attempts to identify what impact mobility has on the professional career of HEI graduates. It complements other studies carried out on the national level, adding unique information on student mobility to other career-tracking systems. It also allows for comparisons between mobile and non-mobile students.
- The methodology of TSGE combines a tracer study and a tracking one, making it possible to capture changes in subsequent age cohorts, with a longitudinal study of a selected group of respondents.
- First results of the pilot study indicate that most graduates are very satisfied with their mobility abroad – just like they were shortly after returning from the mobility period. They feel that mobility experience can be helpful for students entering the labour market and they use such experience as their asset – they underline it in their CVs and job search cover letters.
- Graduates are satisfied with their studies but they don't always use the knowledge and skills obtained during these studies in their professional life. They continue education after graduating, in various types and forms of learning.
- Students don't wait until the end of their studies to start a professional career. 80% of them participate in traineeships and work placements during studies. Over 50% take up work while studying and 45% already have a full-time job when they graduate.
- After the pilot study was completed, the main study was launched in Q4 2017; it will be finished in Q3 2018 and the report will be published in Q4 2018.

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Home

# Why do graduates who spent part of their studies abroad get higher wages? Evidence from Germany<sup>9</sup>

By Nicolai Netz and Fabian Kratz

The past decades have witnessed an **enormous expansion of programs to support the international mobility of students**, the most popular example being ERASMUS. Lots of money has been invested to this end. Both policymakers and scientists have therefore become increasingly curious to know **whether international student mobility (ISM) pays off** for the mobile students.

Several studies from different European countries have addressed this question. They mostly came to the conclusion that graduates who spent part of their studies abroad indeed receive higher wages. It is still unclear, however, whether this wage advantage really reflects a causal effect of ISM. And if so, **which precisely are the mechanisms that explain the often observed monetary returns to ISM?** This is the question that we addressed in an article recently published in *Studies in Higher Education*. To answer our research question, we first developed a conceptual framework for analysing monetary returns to ISM using sociological and economic theories. As no single data set allowed us to simultaneously test all the hypotheses forming our framework, we used data from two harmonised German graduate surveys: the country-wide DZHW Graduate Panel and the Bavarian Graduate Panel.

**What do we find?** First of all, our results confirm that graduates who spent part of their studies abroad receive slightly higher starting salaries. We additionally find that they enjoy a steeper wage growth, so that their wage advantage increases with work experience. Five years after graduation, they enjoy a wage advantage of 7.7% at national level.

**How can we explain these monetary returns?** They are partly attributable to favourable self-selection, meaning that graduates who spent part of their studies abroad receive higher wages not only because they sojourned abroad but also due to other characteristics leading to higher wages. These so-called **selection effects explain** a notable share of the wage advantage associated with ISM. Somewhat less important are what we refer to as competency effects: Our results suggest that a small share of the observed wage advantage results from specific competencies acquired abroad. As such competencies, we considered language skills and an increased likelihood to complete a PhD after graduation.

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<sup>9</sup> Reprint with minor changes from the ACA Newsletter Edition 182 (June 2016)



We have also tested two **further explanatory mechanisms** that were so far largely disregarded in the literature: employer change effects and company structure effects. We can show that even controlling for selection and competency effects, graduates who spent part of their **studies abroad are more likely to change their employer and to realise wage increases** through this strategy. Linked to this, they are more likely to work in large and multinational companies, which can pay higher wages than small and nationally oriented companies. They do not only have better access to multinational companies. They also receive a wage premium within multinationals. Furthermore, we found that internships abroad pay off slightly more than periods of enrolment abroad. Our conclusions on the relevance of the explanatory mechanisms are robust across the two examined types of ISM.

We **contribute to existing research** by examining both already substantiated and new explanatory mechanisms in an integrated conceptual framework. We thereby also try to separate selection effects from different possible causal effects and assess the relative importance of these different explanatory mechanisms. Unlike previous studies, we also examine returns to different types of ISM from both a cross-sectional and a longitudinal perspective. Clearly, our study also leaves behind a need for further research. Further research could test the generalisability of the suggested conceptual framework. Do returns to ISM, for instance, depend on graduates' field of study and profession, on the scarcity value of ISM in a given country and on the characteristics of a national economy?

**What do our results mean for higher education policy?** They imply that the political claim of ISM having a positive impact on students' employment prospects can be upheld. At first glance, this justifies the large public investments in the expansion of mobility programs. At second glance, however, our findings have to be set in relation to research on access to ISM. Previous research has amply demonstrated that spending part of the studies abroad is highly dependent on students' background characteristics. Most prominently, it has shown that students from high social backgrounds are more likely to go abroad than students from low social backgrounds. High-background students could therefore also be more likely to reap the benefits of ISM. Public funding for ISM could thus inadvertently transfer inequalities from the education system to the labour market.

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# Research-based analysis and monitoring of the Erasmus+: Youth in Action Programme

## – implications and results of non-formal education projects supported by the Foundation for the Development of the Education System – Polish National Agency

By **Mateusz Jeżowski**

### Abstract

Projects implemented within the Erasmus+: Youth in Action Programme are based upon the principles of non-formal education. They have been subject to research aiming at describing the learning outcomes and influence on project participants, leaders, youth organisations and local communities. The present article outlines the main conclusions of this research for Poland, including impact on the development of skills, competences, organisations and local communities.

### Introduction

Erasmus+ Youth in Action is part of the Erasmus+ programme of the European Union and aims at supporting European youth projects implemented according to the principles of non-formal education. It builds on the experience of Youth in Action (2007–2013) and Youth (2000–2006) Programmes. The present article aims at sharing the findings of the research carried out within the RAY research network, which monitors the learning outcomes of Erasmus+: Youth in Action projects implemented within the principles of non-formal education.

The RAY network (Research-based Analysis and Monitoring of Erasmus+: Youth in Action) was founded on the initiative of the Austrian National Agency of Erasmus+: Youth in Action in cooperation with the Institute of Educational Science of the University of Innsbruck. Currently, 31 National Agencies and their research partners take part in RAY research projects. The present article focuses on research results for projects supported financially by the Foundation for the Development of the Education System – Polish National Agency of the Erasmus+ Programme.

Research-based analysis and monitoring of the Erasmus+: Youth in Action Programme is ultimately aiming at producing reliable and valid

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**MATEUSZ JEŻOWSKI** is a chief research officer at the Foundation for the Development of the Education System, the Polish National Agency of the Erasmus+ Programme. His current research focuses on university–business relations as well as on competences gained in non-formal education settings. He is a member of two international research consortia and acts as a national Correspondent for Wikipedia on Youth in Poland.

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### KEYWORDS

ERASMUS+: YOUTH IN ACTION, RESEARCH, KEY COMPETENCES, NON-FORMAL EDUCATION, LEARNING OUTCOMES, YOUTH PROJECTS, RAY

documentation and understanding of processes and outcomes of the programme and of the activities supported through the programme<sup>1</sup>. The main objectives are to contribute to quality assurance and quality development of the implementation of the Erasmus+: Youth in Action Programme, to contribute to evidence-based and research-informed youth policy development and to develop a better understanding of processes and outcomes of non-formal education activities, in particular in the youth field.

Specific objectives with respect to research are<sup>2</sup> :

- to study the effects and the impact (short-term and long-term) of Erasmus+: Youth in Action projects on the actors involved – at the individual level (young people, youth workers, project leaders), at the systematic level (youth groups, organisations, bodies, local project environments, communities, youth structures, youth work, youth policy), and at the collective level (larger public);
- to study educational and learning approaches, methods, and processes applied in Erasmus+: Youth in Action projects, in particular with respect to their effectiveness in stimulating and supporting learning processes;
- to study the implementation of Erasmus+: Youth in Action projects, in particular in view of the profile of project participants, project leaders, and organisations involved, as well as with respect to project methodologies and project management;
- to explore the special qualities of the Erasmus+: Youth in Action Programme;
- to study other aspects related to youth work in Europe as considered to be relevant by the RAY Network.

In order to operationalise the above-mentioned goals, the following research questions have been developed<sup>3</sup>:

- What are the effects of Erasmus+: Youth in Action projects on project leaders/team members and their organisations/groups as well as on the local environments of the projects?
- What is the environment of Erasmus+: Youth in Action projects, in particular with respect to access to Erasmus+: Youth in Action, the development of projects, the profile of actors and organisations involved in the projects, the management of the projects and the support provided by the funding structures?
- How could the findings from the RAY study contribute to practice development, in particular in view of the implementation of Erasmus+: Youth in Action and future youth programmes of the European Union?

In order to explore the research questions above, the research design is based on multilingual online surveys for project participants and project leaders according to the following principles and reasons<sup>4</sup> :

- Actors involved in projects funded through Erasmus+: Youth in Action are surveyed two months or longer after the end of the given project in order to provide for a more reflected and distant view of their experiences and the perceived effects. This implies that in the case of international activities the actors involved have returned to their countries of residence and would be difficult to contact for face-to-face interviews or group discussions.

<sup>1</sup> RAY Network Mission Statement, Final Draft, Version 25.4.2016.

<sup>2</sup> Ibid.

<sup>3</sup> Bammer, D., Fennes, H., & Karsten, A. (2016). Exploring Erasmus+: Youth in Action. Transnational Analysis 2015/2016. Vienna.

<sup>4</sup> Ibid.

- Multilingual online surveys allow a large majority of actors to complete the questionnaires in their native language (or in a foreign language they understand sufficiently).
- Surveying both project participants and project leaders/team members of Erasmus+: Youth in Action projects through two different yet coherent and interrelated questionnaires provides for a triangulation of responses, in particular with respect to the perceived effects on the participants by comparing self-perception of participants and the external perception of project leaders/team members.

## Research sample and respondents' profile

The results<sup>5</sup> described in the present article refer to a study carried out in 2015 and repeated in 2016 on a sample of 520 project leaders/team members (265 from Poland) and 2,960 project participants (1,447 from Poland), whose activities have been supported by the Foundation for the Development of the Education System – Polish National Agency of the Erasmus+ Programme. A vast majority of both project leaders and project participants took part in Youth exchange projects, which reflects a general tendency in applications observed at the Foundation for the Development for the Education System (FRSE). A relatively low number of responses of European Voluntary Service projects can stem from the character of such projects – most of them include long-term activities and at the time of the survey a significant number of projects was still on-going, hence was not selected to take part in the study.

**Table 1: Respondents (project leaders/team members and project participants) by project implemented, N = 2,960.**

Project type	Youth exchange	Training and networking	European Voluntary Service	Support for policy reform
<b>Number of project participants</b>	1,774	992	69	125
<b>%</b>	59.9%	33.6%	2.3%	4.2%
<b>Number of project leaders</b>	417	98	5	0
<b>%</b>	80.2%	18.8%	1%	0%

Close to 70% of respondents were female against over 30% were male. In the 2015 and 2016 surveys, for the first time in RAY research respondents had a third sex option (other); it was chosen by two respondents, which was not significant statistically. As far as the average age is concerned, female respondents were slightly younger than male ones. The general tendency observed over the years in Youth in Action and in the Erasmus+: Youth in Action Programmes is that the age of Youth exchange projects participants remains stable (and lower than the average respondents' age) while the age of European Voluntary Service project participants is getting higher over the years. This might still be the aftermath

<sup>5</sup> The results of the transnational analysis are presented in: Bammer, D., Fennes, H., & Karsten, A. (2016). Exploring Erasmus+: Youth in Action. Data Report 2015/2016. Vienna.

of the economic crisis of 2007–2011, when long-term European Voluntary Service projects were treated by many people in their late twenties as an alternative to unemployment<sup>6</sup>. At the time, the FRSE witnessed a sharp increase in applications, especially from Spain and Italy – this tendency is now cooling down, nonetheless the average age of EVS project participants is significantly higher than in the case of Youth exchanges.

**Table 2: Respondents (project participants) by sex and age, N = 2,960.**

Sex	Female	Male	Other
Number of project participants	2,021	937	2
%	68.2%	31.7%	0.1%
Average age	24	25	25

As far as the educational profile of project participants is concerned, more than 50% of respondents graduated from a university, polytechnic or another tertiary college, and a further 20.6% finished upper secondary school. The highest educational attainment as declared by respondents is highly correlated with their age. The older the respondents, the higher their educational attainment, which can lead to the conclusion that in general Erasmus+: Youth in Action participants are well-educated. The respondents who graduated only from primary school were the youngest ones (average age of 15.5), which can mean that they are still pursuing their education and have not stopped at the primary school level. At the same time it is worth noticing a very low number of respondents graduating from upper vocational and technical schools. In Poland primary school graduates continue general education and a large part of lower secondary education graduates choose to pursue their educational path in general profile secondary schools<sup>7</sup>, yet the overall number of pupils in technical schools is higher than in general profile secondary schools. Therefore it is worth noticing that the number of technical and vocational school graduates is disproportionally low among respondents.

**Table 3: Highest educational attainment of project participants, N= 2,960.**

My highest educational attainment is:	%
University, Polytechnic, post-secondary/tertiary level college	54.2%
Upper secondary school	20.6%
Lower secondary school	14.8%
Upper vocational school	3.5%
Technical school	3.5%
Primary school	3.4%

<sup>6</sup> According to the minutes from the National Agencies Meeting, Brussels 2013.

<sup>7</sup> According to the data of the Central Statistical office of the Republic of Poland, in 2016/2017 48.6% of lower secondary education graduates chose to pursue their education in general profile high schools. Source: Oświata i wychowanie w roku szkolnym 2016–2017.

Over 65% of respondents declared that they lived in a large or medium-sized city. Close to 15% lived in a small town, however only 7.7% of respondents declared that they lived in a secluded rural area.

**Table 4: Place of residence of project participants, N = 2,960.**

I live mainly in...	%
... a metropolitan area (more than 500,000 inhabitants)	30.1%
... an urban area (100,000 to 500,000 inhabitants)	23.8%
... a small town (5,000 to 25,000 inhabitants)	14.6%
... an intermediate area (more than 25,000 but less than 100,000 inhabitants)	11.2%
... a rural area close to an urban/metropolitan area (fewer than 5,000 inhabitants but within 45 minutes' travel time to an urban/metropolitan area)	9.2%
... a rural area (fewer than 5,000 inhabitants and more than 45 minutes' travel time to a city with more than 100,000 inhabitants)	7.7%
... a suburb of an urban/metropolitan area	3.4%

Given the fact that the majority of respondents are well-educated and live in cities, it is not surprising that almost 50% of them declared that they get their fair share of opportunities compared to the way their peers live and another 19% claimed to get even more than their fair share. At the same time, one fifth of respondents thought they got less or much less than their fair share of opportunities compared to their peers. A considerable number didn't know how to answer this question and 5% did not understand it. Given the above it is still surprising that almost 20% of respondents claimed to have encountered some obstacles in accessing education. The numbers are even higher for accessing work and employment and active participation in society and politics.

**Table 5: Access to opportunities of project participants, N = 2,960.**

Compared to the way other people of your age/peers live in your country, do you think...	%
... that you get your fair share of opportunities?	47%
... that you get more than your fair share of opportunities?	19.1%
...that you get somewhat less than your fair share of opportunities?	14.9%
...that you get much less than your fair share of opportunities?	5.1%
I do not know.	8.9%
I don't understand the question.	5.1%

**Table 6: Obstacles that project participants face, N = 2,960.**

Do you feel that you are faced with obstacles:	%
in accessing work and employment?	43.1%
to your active participation in society and politics?	23.4%
to mobility?	21.2%
in accessing education?	19.7%

Based on the research results a non-homogeneous profile of project participants can be drawn. On the one hand, the respondents are, in general, well-educated people living mostly in big cities or medium-size towns who, in most cases, think they get their fair share of opportunities compared to their peers. Still, over 40% of them claimed to have encountered obstacles in access to employment, more than 20% in being able to actively participate in society, politics and mobility, and 19.7% – in education.

### Erasmus+: Youth in Action impact on skills development

This section explores the skills development of project participants. The results presented below are based on participants’ self-assessment (Figure 7) as well as on the assessment of project participants’ competence development performed by the project leaders (Figure 8).

The research results showed a very strong influence of Erasmus+: Youth in Action projects on participants’ skills development. High values were reported across all activity types and scores ranged from 64.7% to 95%. The vast majority of participants declared that through participation in a youth project they had learned better to cooperate in a team (95%), to communicate with people who speak another language (94.3%) or to negotiate joint solutions when there are different viewpoints (89.3%). The participants also declared to have improved their skills related to project management, such as developing an idea and putting it into practice (86.8%) or saying what they think with conviction in discussions (88.3%). Only 64.7% of project participants declared to have learned to produce media content on their own. In general, the above-mentioned skills require a great deal of independence and self-reliance, which can lead to the conclusion that project participants became more independent after the Erasmus+: Youth in Action project.

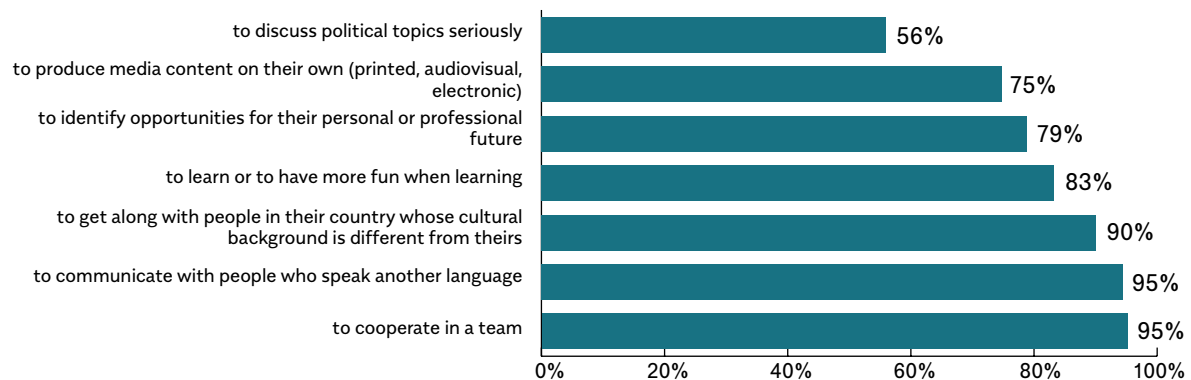
**Figure 1: To what extent do you agree or disagree with the following statements? Through my participation in this project I improved my ability... Percentage of positive answers of participants, N = 2,960.**



Most of the project participants’ perceptions related to skills development were confirmed by project leaders: for example the ability of project participants to cooperate in a team or to communicate with people who speak another language. Project leaders also pointed out that thanks to the project participants learned better to get along with people whose cultural background was different than theirs (90.1%) or to have more fun when learning (83.3%). The only serious discrepancy concerned the ability

of project participants to produce media content on their own (self-perception – 64.7% against the perception of project leaders – 74.8%).

**Figure 2: Which of the following skills did the participants develop through their participation in the project? The participants learned better... Percentage of positive answers of project leaders/team members, N = 520.**



## Erasmus+: Youth in Action impact on attitudes

The skills development described in the previous section had a direct influence on participants' attitudes and contributed to their development in a broad sense. A significant majority of surveyed participants can now better deal with new situations, became more self-confident and are able to identify their strengths and weaknesses better. One fourth of the respondents claimed that the project hadn't had any significant influence on them.

**Figure 3: Attitudes of project participants after the project. Percentage of positive answers, N = 2,960.**

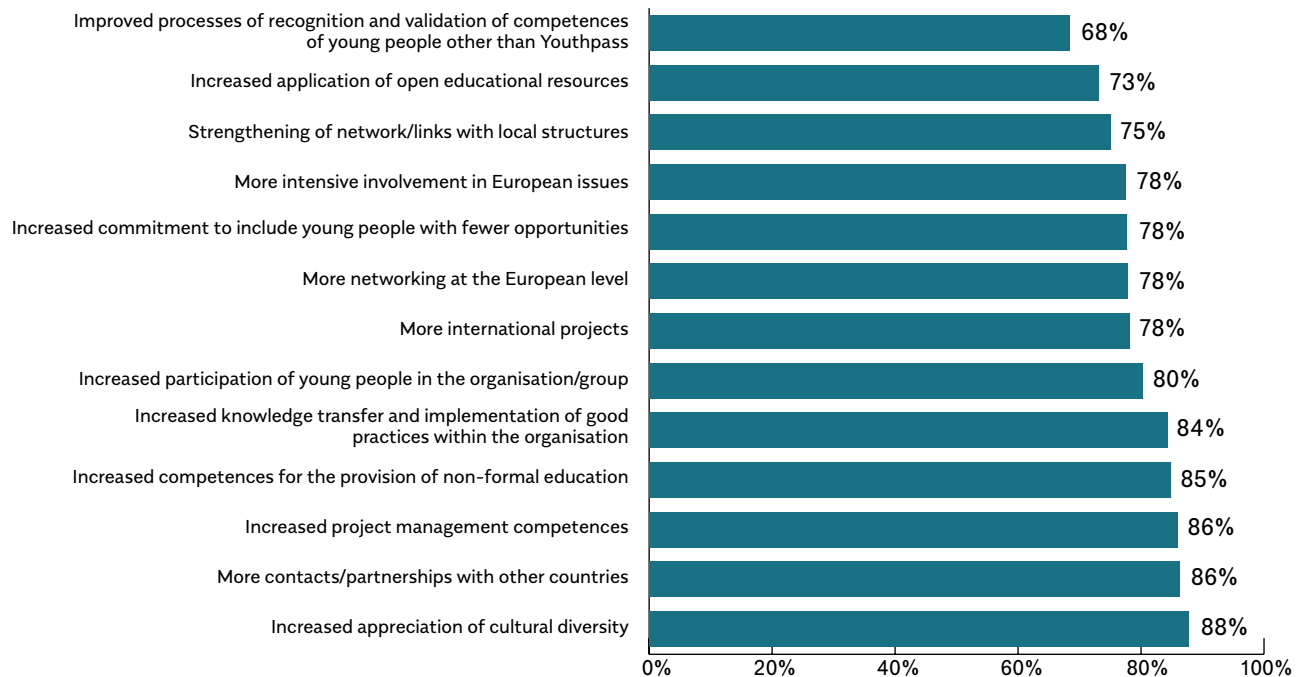




## Other aspects of Erasmus+: Youth in Action impact

Erasmus+: Youth in Action projects have a significant influence on organisations implementing them which can be divided into 3 categories: influence on the contact network, operational capacity, and staff competences. 86.2% of project leaders claimed that thanks to the project their organisation managed to establish more contacts and partnerships with bodies from other countries and 77.8% confirmed that it enabled them to network at the European level. 78.1% of project leaders stated that their organisation now implements more international projects and another 80.2% confirmed that thanks to the project they observed an increased participation of young people in their organisation/group. Finally, a vast majority of project leaders claimed that the project management competences in their organisation increased (85.9%).

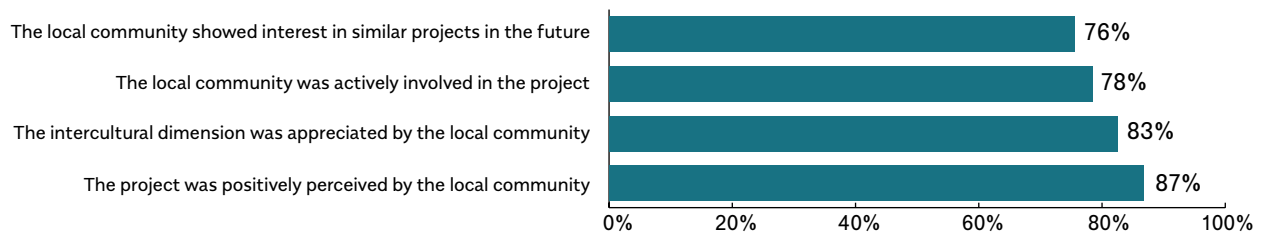
**Figure 4: What effect did the project have on our organisation/group/body? Percentage of positive answers of project leaders/team members, N = 520.**



Erasmus+: Youth in Action projects have a significant influence not only on project participants, leaders and organisations but also on the local communities in which they are implemented<sup>8</sup>. According to a vast majority of project leaders who answered the survey the projects were perceived positively by local communities, which showed appreciation for their intercultural dimension. Close to 80% of respondents also stated that their project actively involved the local community, which can prove the important added value of youth activities engaging not only their participants but also the wider public. Finally, a significant number of project leaders confirmed that their local communities would be interested in organising similar projects in the future.

<sup>8</sup> This aspect has been further developed in separate research: Jeżowski, M., Zaidova, S., & Zsiday, K. (2017). The impact of European Voluntary Service projects on local communities. Warsaw.

**Figure 5: Erasmus+: Youth in Action project effects on the community in which it was carried out. Percentage of positive answers of project leaders, N = 520.**



## Conclusions

The research results clearly indicate that the development of skills and competences is very high for project participants and, therefore, one of the key youth-specific aims of the Erasmus+ programme, namely *to improve the level of key competences and skills of young people, in particular through learning mobility opportunities*<sup>9</sup>, is fulfilled. Participation in Erasmus+: Youth in Action projects also contributes to the increase of independence and self-reliance of their participants and can increase their chances on the labour market.

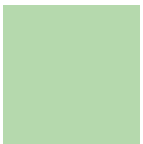
The second key youth-specific aim of the programme: *to strengthen the role of youth organisations as support structures for young people, in particular through enhanced cooperation*<sup>10</sup>, is also achieved. The organisations state that they have more international contacts and partnerships and that their management skills increase as a result of Erasmus+ projects. What is more, local communities observe a positive impact of the projects and show interest in implementing similar activities in the future.

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<sup>9</sup> Regulation (EU) No 1288/2013 of the European Parliament and of the Council of 11 December 2013 establishing "Erasmus+": the Union program for education, training, youth and sport and repealing Decisions No 1719/2006/EC, No 1720/2006/EC and No 1298/2008/EC (Text with EEA relevance).

<sup>10</sup> Ibid



Home

# Global Mindedness survey: Do mobility periods change the way students engage with difference?

By Irma Garam

## Abstract

The article examines the main findings from the Global Mindedness Survey carried out in Finland in 2013–2016. The aim of the survey was to measure students' attitudes and possible change in them during a study abroad period. The findings reveal that it is difficult to show clear change in attitudes. Students heading abroad are very open-minded and flexible with their attitudes already before the period abroad.

## Background

Every year, thousands of students in higher education head abroad for an exchange or a traineeship. The funding programmes supporting internationalisation regard the usefulness of the mobility period for students' studies and future career as particularly important. Studying abroad promotes students' development in many ways, but we know less about what happens to students' attitudes.

Today, as the atmosphere for discussions in many European countries has become more tense and divides people into supporters and opponents of internationality, it is increasingly important to look at the impacts of internationality and especially at attitudes. Here, the attitudes people take to different perspectives and the discussions they engage in across cultural boundaries are significant background factors.

The Centre for International Mobility's (CIMO, currently the Finnish National Agency for Education) Global Mindedness survey was carried out in Finland between 2013 and 2016 to examine the impact of mobility periods on students' attitudes. The Global Mindedness survey measured how students engage with difference and what kind of changes take place during their mobility periods. To obtain material for a comparison between students who headed abroad and those who studied only in Finland, after the pilot stage the survey was also extended to students who did not go abroad.

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### KEYWORDS

INTERNATIONAL MOBILITY, IMPACT, ATTITUDES, HIGHER EDUCATION STUDENTS



Based on the data gathered, this article summarises the main findings of the Global Mindedness survey from a period of three years. It asks whether students' attitudes towards difference change during a mobility period. It also looks to see if students who complete a mobility period are somehow a select group of people and whether they engage with difference in a way dissimilar from their peers who study only in Finland.

## About the Global Mindedness Survey

The Global Mindedness Disposition Instrument is used to find information about the impact of international experience on an individual and on attitudes. It aims to measure how students in higher education engage with difference and whether this engagement changes during the mobility period.

The primary target group of the survey consisted of higher education students who headed abroad for an exchange or a traineeship. Later, a group of students who studied only in Finland was included for comparison.

The instrument was developed for the Centre for International Mobility (CIMO) by Vanessa Andreotti de Oliveira, Professor of Global Education, and her research group from the University of Oulu.

In the questionnaire, engagement with difference was measured through 21 statements with which students could agree or disagree. Students were asked to respond to the survey twice: before their mobility period (ex-ante) and after it (ex-post). In addition to the 21 statements, the ex-ante mobility survey contained various background questions and the ex-post mobility survey contained questions requiring students' self-assessment on the impact.

## Tourism, Empathy and Visiting: three dispositions towards engaging with difference

The Global Mindedness survey is based on three distinct dispositions to engaging with difference: Tourism, Empathy and Visiting<sup>1</sup>. They are not seen as stages of development nor are they put into any kind of order of preference as each of them may be useful in different situations.

However, in practice, Tourism represents a more rigid approach to engaging with difference. The dispositions of Empathy and Visiting can therefore be regarded as more constructive approaches in international and multicultural interaction.

**Tourism** – based on objectivism: the world can be understood and described in only one way. "Tourists" already know what they will find abroad. Different cultures and views appear as other. The disposition of tourism strives to eliminate difference.

**Empathy** – based on relativism: we all have different perspectives on the world. Seeking to understand how others view the world, which helps to bridge the difference between self and other. The disposition of empathy aims at a fusion of perspectives.

**Visiting** – based on pluralism: accepts that people can live and function in different worlds. Opening to and encountering others' perspectives outside a ready-made framework. The disposition of visiting aims at a meeting of different worlds.

<sup>1</sup> De Oliveira Andreotti, V., Biesta, G., & Ahenakew, C. (2012). Global Mindedness Dispositions Instrument. Final Report. April 2012. (Background paper submitted to CIMO by the research group.)

## Students responding to the survey

The survey was available to students heading abroad between May 2013 and October 2016. During the three years of operation a total of 1,371 mobile students responded to both the questionnaire before the mobility period and the ex-post one.

The respondents were from 37 institutions of higher education in Finland. Over two thirds of them were women. 55% of the respondents were from research universities and 45% from universities of applied science. More than half of the respondents were under the age of 24 and for over a third of them this was the first time they were going abroad for a longer period to study or work.

The non-mobile control group consisted of 518 students who studied in Finland only. They responded to the first survey ("before going abroad") during the academic year 2015–2016. They were at least in their third year of study and would already have had an opportunity to complete a mobility period. The students were from six Finnish universities. Students in these selected universities had also been active in answering the original Global Mindedness survey<sup>2</sup>.

The comparison to the group of non-mobile students was made with 881 mobile students whose mobility periods were completed between the autumn of 2014 and that of 2015. The first survey (before going abroad) was used in the comparison.

The profiles of mobile students who were heading abroad and non-mobile ones who studied only in Finland were fairly similar. In both groups, just over two thirds of the students were women and more than one half were university students. Half of them studied natural sciences, medicine or technology, one third business administration or social sciences and one fifth humanities or education and culture.

In terms of age, there were differences between the groups: the students who stayed in Finland were older, on average 29 years of age, whereas the students who headed abroad were on average 24. However, this may be due to the fact that the students who stayed in Finland were at least in their third year of study. There were also differences in the respondents' backgrounds: there were more students who had previously lived abroad and more students who felt they belonged to a cultural minority among those who headed abroad.

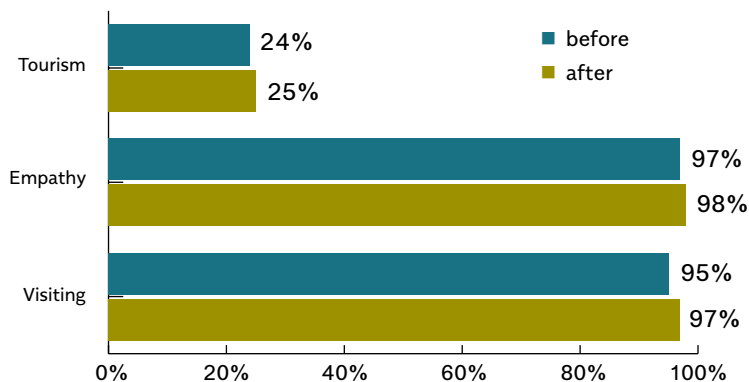
## Change during the mobility period

Students who head abroad have on average a very flexible attitude to engaging with difference. The disposition of Tourism, which strives for one interpretation, is shared by about one quarter of the students, whereas the disposition of Empathy, which understands opposite attitudes, and the disposition of Visiting, which questions one's own assumptions, are shared by almost everyone. A student is regarded as sharing a disposition if she or he agrees with at least four (out of seven) statements measuring this disposition.

The situation was the same both before and after the mobility period. This indicates that, on average, the attitudes did not change during the mobility period.

<sup>2</sup> Initially the questionnaire was provided for mobile students only. The idea of a non-mobile control group was implemented at a later stage.

Figure 1: Dispositions of Tourism, Empathy and Visiting before and after a period abroad. Students agreeing with the disposition, %.



Source: Global Mindedness Survey for mobile students, autumn 2016 reporting, N = 460.

The disposition of Tourism stands out among those respondents who were about to study or work abroad for the first time. The gap grew smaller once the students had returned to Finland.

The respondents' gender and educational field also had an impact on the disposition. Tourism was more prevalent among men than among women, both before and after the mobility period. Women were more predisposed to Visiting. It also appears that women find it easier to engage with internationality and related phenomena: for example, women are more likely to study abroad than men.

Students of Natural Sciences and Engineering agree more often with Tourism and less often with Visiting than do students of other fields. This may be because Natural Sciences and Engineering are dominated by male students, but it may also be down to the specific nature of these fields.

## Change becomes more visible when looking at individual respondents

Respondents may have various configurations of dispositions. The most common configuration is one dominated by Empathy and Visiting and not dominated by Tourism (tEV). This configuration was shared by almost 80% of the respondents. Another fairly typical configuration was one dominated by all three dispositions (TEV), shared by about 15% of respondents.

A disposition is deemed to be dominant if a respondent agrees with at least four statements measuring this disposition. A dominating disposition is indicated here with a capital letter.

Looking at the individual configurations before and after mobility makes the change more visible than examining the dispositions only on the level of average. The change takes place mainly in the disposition of Tourism, which weakened among 10% of the respondents who had agreed with it (TEV → tEV). Correspondingly, the disposition strengthened among 10% of the respondents who agreed with it after returning from their mobility periods although they had previously disagreed with it (tEV → TEV). Thus, there was a two-way change during the mobility period, both in a more rigid and in a more flexible direction.

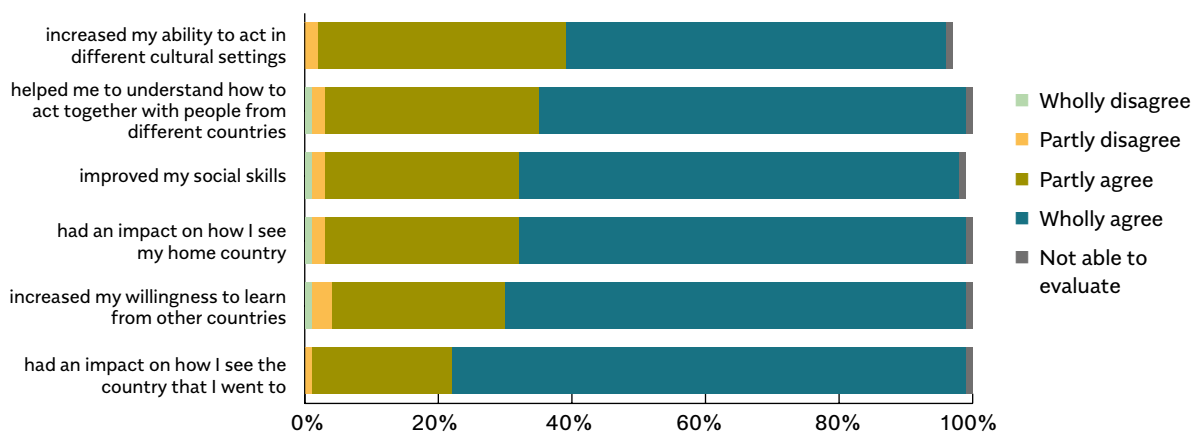
These changes in attitudes cannot be explained by factors related to the mobility period, such as the target country or the length of the mobility period, or by the person's background, e.g. age, previous experiences abroad or field of education. There would seem to be more individual factors in the background.

## Students find mobility periods useful

The students who had completed a mobility period also had an opportunity to assess its impacts themselves in the post-mobility survey. A common factor in the material collected during the different years was the fact that in students' assessments, the impacts were much more significant than those measured by the Tourism-Empathy-Visiting instrument.

A clear majority, as many as 95% to 97% of the respondents, felt that the mobility period had had an impact on how they perceived the target country, their home country and themselves, and had increased their willingness to learn about other countries and network internationally. Equally many noticed that the mobility period had improved their interaction skills and ability to function in different cultures.

**Figure 2: Respondents' self-assessment on impact, %.** "My time abroad..."



Source: Global Mindedness Survey for mobile students, autumn 2016 reporting, N = 460.

Different measurement methods provide different results. Usually, the mobility period is an important and positive experience for the student. When the student assesses the impact soon after returning from a mobility period, the responses may also reflect enthusiasm over the experience instead of actual changes that have taken place.

## Students with a flexible attitude are predisposed to go abroad

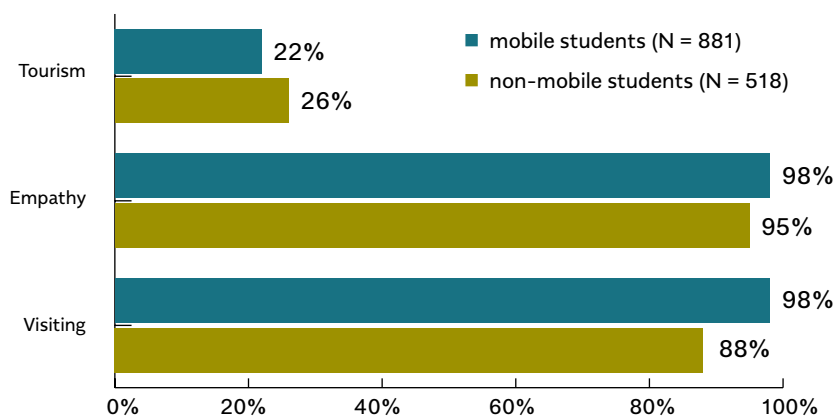
Some differences were found in the attitudes of mobile students and students who studied only in Finland. Mobile students agreed less often with the disposition of Tourism, although the difference was not statistically significant. Mobile students also agreed more often with the disposition of Visiting and here the difference was significant.



In other words, among mobile students there were more of those who were prepared to question and reconsider their presuppositions in a new situation and fewer of those who strictly insisted that there is only one way to perceive the world. Based on the material, it can be said that the group of students heading abroad was somewhat predisposed. Moving to a new environment challenges familiar operating models so the decision to head abroad may be easier for a person with a flexible attitude.

On the other hand, even though there were differences between those who headed abroad and those who stayed in Finland, the differences were not huge. In both groups, more students agreed with the disposition of Visiting and fewer students with the disposition of Tourism.

**Figure 3: Dispositions of Tourism, Empathy and Visiting among mobile and non-mobile students. Students agreeing with the disposition, %.**



## Women are more flexible than men

There was a connection between the background variables and how common the dispositions were. The most noticeable impact was that of gender on the disposition of Tourism: men agreed with the disposition more often than women both among those who stayed in Finland and those who were mobile. Here, the difference between the genders was more significant than the difference between mobile students and those who studied in Finland.

Students studying at a university of applied sciences agreed with the views of the disposition of Tourism more often. The difference was particularly large among students heading abroad: 29% of students of universities of applied sciences and 17% of university students agreed with the disposition of Visiting. There was no significant difference between those who studied only in Finland.

Similarly, there was a connection between previous experiences abroad and how common the disposition of Visiting was. Students who had previously lived abroad agreed with it more often than students with no experience abroad. However, the difference between mobile students and those who stayed in Finland was even clearer. These two variables also overlapped as there were clearly more students who had lived abroad among mobile students than among students who stayed in Finland.

## Conclusion: What does the Global Mindedness survey tell us about attitudes?

It is difficult to use the Global Mindedness survey to try to show any clear and unambiguous changes in the attitude of a student who has completed a mobility period. The instrument provides a picture in which the level of changes is less significant than the benefits estimated by students themselves.

Some students' disposition to engaging with difference changes, but these changes are both in a more rigid and in a more flexible direction. Thus, attitudes do not automatically become more flexible when a student is abroad.

The low level of changes does not necessarily mean that the instrument is bad, but it is more likely to be an indication of a permanent phenomenon in the background. Attitudes are part of people's deep structure, something that does not change easily. A mobility period of a few months is not likely to bring about big changes, even if it is a memorable experience for the student.

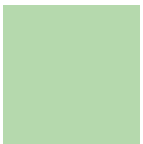
A central factor in attitudes and changes in attitudes is whether encountering a new culture is discussed before the mobility period and whether any related objectives are set for the mobility period. Discussing these issues with students in the coaching given before and after the mobility period would help the student to adapt to a new environment and reflect on her or his operating practices.

The Global Mindedness Disposition Instrument measures a fairly restricted area of impacts of internationalisation – how rigidly or flexibly the student engages with difference. The mobility period may have a number of other impacts that remain outside the scope of the instrument. The survey is not entirely unproblematic, either, as some of the statements are complicated and responding to them is not easy.

On the other hand, the surveys conducted over a period of three years provide a consistent picture of engagement with difference. This is likely to be an indication that the instruments have managed to capture something of the students' way of thinking.

The results of the Global Mindedness survey show that the group of students who complete a mobility period is somewhat selected. Their attitude to engaging with difference is slightly more flexible than that of students who stay in their own higher education institution. From the point of view of equality, it would be essential for higher education institutions to be able to encourage as diverse a group of students as possible to complete a mobility period.

The Global Mindedness survey has provided a new, interesting perspective on the impacts of mobility periods and has given concepts for defining ways different people and perspectives are encountered. Although the survey has ended, evaluating the impact of internationalisation continues to be a topical issue.



Home

# Can internships be the key to a professional career?

## Results of the tracer study on the careers of former participants of internships and traineeships funded by European programmes in the field of education

By Michał Pachocki

### Abstract

This article investigates the outcomes of vocational trainee placements abroad, which were funded by different European educational programmes over the last decade. The target group of this research were the former mobility participants and the study was conducted with the use of quantitative and qualitative methods. The results include the participants' perception of their work mobility, the identification of acquired skills and their usefulness in further professional life.

### Introduction

The European Commission defines the term “transnational learning mobility” as a trip abroad aimed at acquiring new knowledge and skills, learning a language and developing broad intercultural competences. Such mobility can be implemented at any stage of education, including vocational education and training<sup>1</sup>. In view of limited financial resources available to schools and school governing authorities in Poland, primarily European programmes in the field of education provide access to transnational mobility for training to students of vocational schools. Thanks to such financial support, people at the initial phase of vocational education and training can serve internships in enterprises or practical training institutions in other European countries.

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### KEYWORDS

VOCATIONAL EDUCATION, LEARNING MOBILITY, VET GRADUATES, TRANSNATIONAL TRAINING, LABOUR MARKET

<sup>1</sup> The term used above can be found in the document *Green Paper – promoting the learning mobility of young people* adopted by the European Commission on 8 July 2009.

Since 2007, EU funds have financed more than 60,000 mobilities for interns and trainees coming from Polish vocational schools.<sup>2</sup> As part of transnational training mobilities, the participants interned at companies, training centres and other practical training institutions abroad. The main goal of transnational mobilities was to combine theory and practice, as the training period in another country was designed to facilitate the transition from education and training to employment. Research activity described in the article aimed to determine the impact of such projects on professional careers and personal development of former students. The study has also helped to determine the competences gained or developed by the interns and the extent to which they have proven useful in the real world and in the context of labour market requirements.

## Methodology of the study

The study focused on internships and traineeships funded by European educational programmes which supported activities aimed at vocational education and training:

- **the Leonardo da Vinci Programme**, which formed part of the Lifelong Learning Programme carried out in the years 2007–2013;
- **the Erasmus+ programme**, which is a continuation of activities carried out under the previous programming phase of EU funds, and which is carried out in the years 2014–2020;
- **systemic projects funded by the European Social Fund**, within which the Foundation for the Development of the Education System has since 2012 supported beneficiaries placed on reserve lists of the above-mentioned programmes (projects were implemented in accordance with rules pertaining to the Leonardo da Vinci and Erasmus+ programmes).

An internship under part of any of the above programmes could be served in any country participating in them, above all in Member States and EU candidate countries (depending on the status in the call year) and in countries associated with the EU in the framework of the EFTA/EEA. Not only schools but also other institutions having substantive supervision over the training of persons at the initial phase of vocational education and training could apply for funding under the programmes, and mostly students of vocational and technical schools, apprentices (people during initial vocational training in the workplace) and recent graduates were mobility participants.

In the context of the study, for the first time an attempt has been made to assess the impact of transnational training mobility on the careers of its participants from Poland.<sup>3</sup> In developing premises and research tools, not only purely professional skills acquired in the framework of formal education but also soft skills obtained in the process of non-formal education, as part of activities carried out directly in the framework of an agreed training mobility, were taken into consideration. The main focus of the study has been identified by formulating the following key questions:

<sup>2</sup> Data on the basis of reports on the implementation of the Lifelong Learning and Erasmus+ programs published by the Foundation for the Development of the Education System, which is the institution responsible for the implementation of these initiatives in Poland. Cf. Dąbrowska-Resiak, J., Jeżowski, M., Koźbiał, E., Łoboda, I., Miłoś, E., Nowacka, A., Pachocki, M., Piekarska, M., Szwalek, K., & Wojciechowski, T. (2016). Raport 2015. Warsaw: Foundation for the Development of the Education System, 978 83 65591 01 2; Miłoś, E. (2015). Raport 2014. Warsaw: Foundation for the Development of the Education System, 978 83 64032 62 2; Szwalek, K. (2014). Raport 2007–2013. Warsaw: Foundation for the Development of the Education System, 978 83 64032 35 6.

<sup>3</sup> The intended project implementation cycle regulates the issues related to current monitoring of mobility and provides tools for identifying the level of satisfaction with participation in transnational training mobility upon the participant's return.

- Do transnational mobilities impact on future careers and personal development of former interns and trainees and, if so, to what extent?
- What new competences and skills did mobility participants acquire or develop during practical vocational training abroad?
- To what extent have these competences proven useful, especially in the context of the participants' professional situation and standing on the labour market?

The study was conducted using quantitative and qualitative techniques. The study results have been supplemented with data obtained as part of desk research (mainly contextual information and statistical summary of programmes implementation). The triangulation of tools resulted from differing characteristics of the two respondent groups (vocational school students and recent graduates) and the triangulation of methods primarily aimed at collecting in-depth information on the experiences related to mobility and its effects.

An online questionnaire was distributed to all available e-mail addresses of former participants of the programmes. A link to the survey was also made available to schools, with the request to distribute it among former students as well as mobility participants still educated by the school. As a result, the National Agency received more than 2,600 anonymous questionnaires with responses.

The respondents of individual in-depth interviews (IDI) were school graduates who participated in transnational internships and traineeships organised as part of the programmes. A randomly selected sample was varied in terms of participants' sex, areas of training, occupational qualifications and target country of mobility. Meetings took place at the residence, workplace or school of former trainees. In total, 20 interviews were held with people living in different regions of Poland, the majority of whom were graduates of technical upper secondary schools (*Polish: technikum*) (16 people).

In the framework of the study, focus group interviews (FGI) were also conducted with students who participated in transnational mobilities. The study was conducted at five schools which have actively carried out projects funded by the Erasmus+ and European Social Fund programmes in different years. The schools were selected in such a way as to ensure that student groups were trained in different professions and industries. Students in the second, third and fourth grade of technical upper secondary schools and in the second grade of basic vocational schools were interviewed. The focus group interviewees also included recent graduates who had completed their education in the school year preceding the study. In total, 65 people were interviewed.

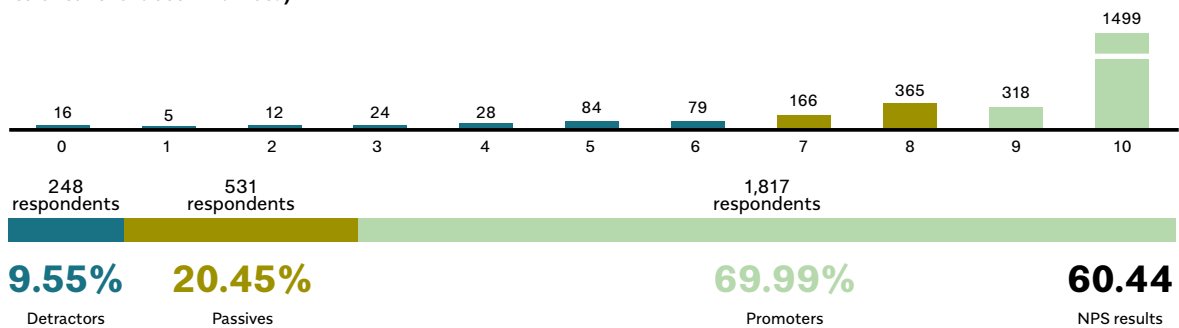
It should be added that, to some extent, the study also played the role of an ex-post evaluation and was an attempt to answer the question whether the completed projects were successful and met the objectives forecast both by beneficiaries and programme operators. This is why the study results can also be used for qualitative assessment of European education programme offer addressed to the vocational education and training sector in Poland. Such an assessment can cover topics including the quality of participants' preparation for transnational mobility, usefulness of the intervention, quality of partnership and sustainability of project outputs.

## The overall assessment of satisfaction

Both respondents to the quantitative survey and interviewees positively evaluated the transnational mobility for training in terms of opportunities for acquiring new knowledge and practical skills. A vast majority of former trainees saw the participation in the mobility as an important element of their training

which went beyond the framework of formal education and allowed them (often for the first time in their lives) to experience the reality of work in a given occupation. This aspect proved to be particularly important in the context of future job searches and was reflected in responses to the questionnaire (more than two thirds of the respondents declared that they would recommend practical training abroad to other entrants into the labour market).

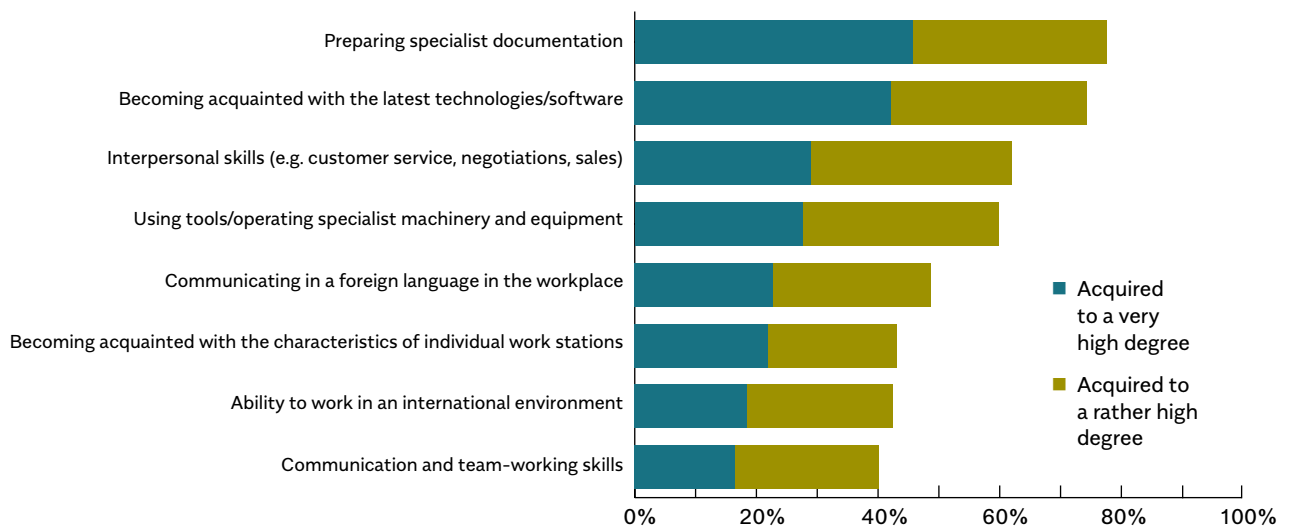
**Figure 1: Responses to the questionnaire: Net Promoter Score.** (Summary of responses to the question: *On a scale of 0 to 10, how probable is it that you would recommend a transnational training mobility to people who are about to enter the labour market?*)



Moreover, the participants agreed that transnational training mobility proved to be a very positive and needed experience which allowed them to directly draw on specific solutions applied abroad and experience a different context for performing professional duties.

It should be added that organisational aspects of the mobility abroad also had an impact on the qualitative assessment of the internships/traineeships. Due to the fact that the experience acquired during the mobility abroad differed depending on how well it was organised, respondents had divergent and sometimes even opposing views on the benefits of participation in training abroad.

**Figure 2: Responses to the questionnaire. The degree of occupational competence acquisition during training, according to the former interns and trainees.**



In the case of group mobilities to practical training institutions abroad, where students worked together, the proposed work programmes had to be adjusted to the skill level of the whole group. In the opinion of the former trainees, such a solution on the one hand allowed the organisers to prepare a coherent training schedule, but on the other generally did not provide room for modifying this schedule to ensure that it met the expectations of individual students. The situation was different with individual mobilities to enterprises, where the employers often personally supervised the trainees or appointed mentors for them. Respondents emphasised the fact that training organised in such a way was primarily based on real needs and trainees were treated on an equal footing with employees involved in the current work schedule resulting from the work logic of a given company.

**Figure 3: Responses to the questionnaire. The degree of soft skill acquisition, according to the former interns and trainees.**



In the case of internships where students worked as a group, they moved everywhere together, also after work. They ate meals together and it was more difficult for them to have interactions with the local work environment and to establish contacts. However, trainees working individually for different employers had a greater chance to adapt the work schedule to their individual expectations and the performance of their daily duties in the working position fostered establishing contacts with other employees, including other trainees from different countries. The trainees were also offered jobs by their employers. So it can be concluded that individual stays at enterprises provided more opportunities not only to experience the characteristics of the local labour market but also to better understand the cultural context and local mentality.

## Selection of career paths

The results of the study have shown that Polish participants of internships and traineeships focus mainly on acquiring new skills, in particular those considered important from the point of view of the requirements of the labour market, both at the stage of searching for a job and as part of performing



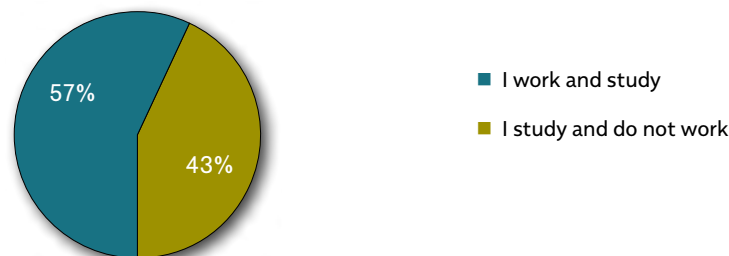
everyday duties. This has been confirmed by declarations relating to the selection of the school, which in the case of the vast majority of respondents reflected their crystallised professional expectations.

Some respondents emphasised the fact that learning at a technical upper secondary school offers a wide range of choices pertaining to their career path. This type of school combines the advantages of a general upper secondary school (*Polish: liceum*) and a vocational school, as it is the meeting point of general education and practical training. It offers secondary education qualifications attested by a secondary education certificate and specific occupational skills confirmed by a vocational qualifications examination. This choice also allows considerable flexibility, as technical upper secondary school leavers hold vocational qualifications and can continue their education (just as their peers leaving general upper secondary schools can) in higher education institutions, which graduates of vocational schools cannot do. The former trainees say that an additional advantage of technical upper secondary schools is the possibility of postponing the decision to continue studies in higher education institutions. Before deciding on the field of study they would like to pursue as part of tertiary education, former students of technical schools can start professional activity directly upon completion of secondary education thanks to vocational qualifications they have acquired. Therefore, obtained work experience significantly improves their standing on the labour market.

Many respondents, already in the course of their learning, had crystallised expectations, not only concerning the choice of school profile but also their future professional activity. These often resulted from their interests (a dream job a given student always wanted to do), local characteristics (prevailing industry in a given region or the location of a large plant in the vicinity of their place of residence), and family traditions (intention to work in the family business or in the profession in which their parents work).

In this context, many respondents said that transnational training mobilities offered by their school were the factor that persuaded them to choose that very institution. At the same time, many of them believed that attending a general upper secondary school (and finishing education at that stage) was a waste of time, mainly because such schools did not offer opportunities for acquiring specific vocational qualifications, and therefore they did not provide clear prospects of quickly finding a satisfactory and well-paid job.

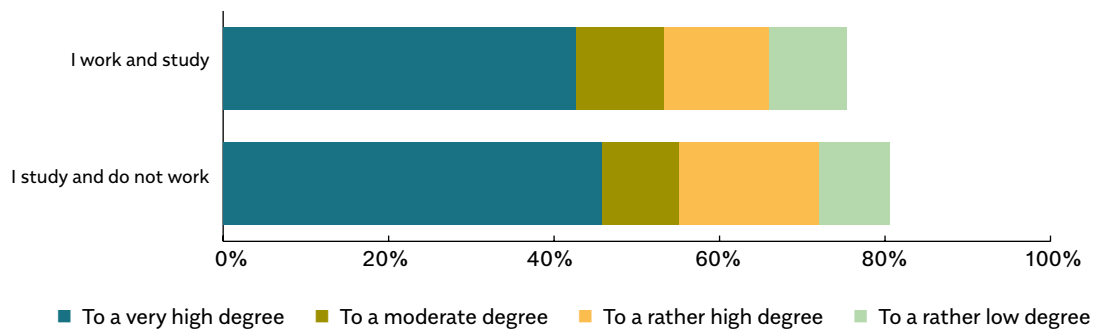
Figure 4: Responses to the questionnaire. Combining work and study by the former trainees.



The opinions presented above can also reflect the debasement of higher education. Although in the opinion of the respondents a higher education diploma invariably forms a valuable (and attractive in the eyes of employers) qualification, the mere fact of completing higher education studies does not mean that a graduate possesses skills required on the labour market. As taking up studies after completing a general upper secondary school did not guarantee finding employment, for the majority of respondents

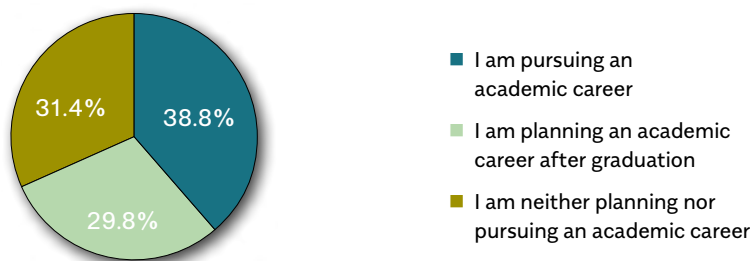
the priority was to acquire solid vocational qualifications. Such qualifications were meant not only to ensure a good standing on the labour market but also to offer the comfort of pursuing higher education studies for pleasure. In such a case, studies made it possible to develop interests and were not treated as a precondition for attaining success on the labour market.

**Figure 5: Responses to the questionnaire. The compatibility of the field of study with vocational qualifications acquired at school. Summary of responses to the request: Please specify the extent to which you agree with the following statements – The field of my studies is/was compatible with vocational qualification acquired at school.**



Although the respondents said that their professional development priority was gaining practical skills and not being awarded a university diploma, it should be emphasised that students and graduates of higher education institutions formed more than 25% of the study participants. In accordance with respondents’ declarations, more than 68% of people who decided to take up studies continued or intended to continue their academic career. The vast majority of respondents who completed vocational schools combined work and studies.

**Figure 6: Responses to the questionnaire. Plans for pursuing an academic career by the former trainees.**

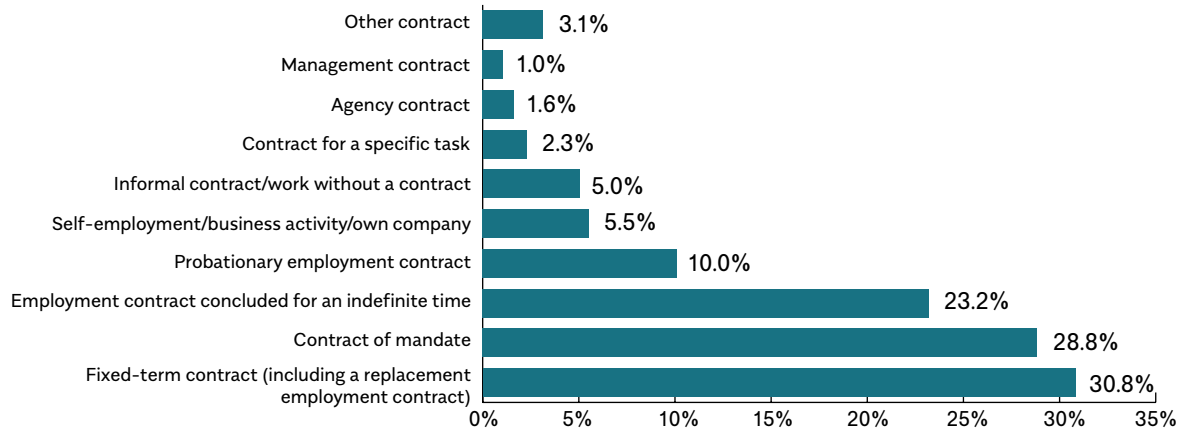


### Current employment

More than 70% of the questionnaire respondents already finished school at the time of the survey, and more than 57% of former students were already active on the labour market. All respondents in the latter group declared their satisfaction with their jobs and positively assessed the following working conditions: opportunities for professional development, good atmosphere at work, kind colleagues, and working hours allowing them to find a balance between their professional duties and their personal life. It should be added that in the opinion of many respondents their work was satisfactory mainly in the context of their further professional development.

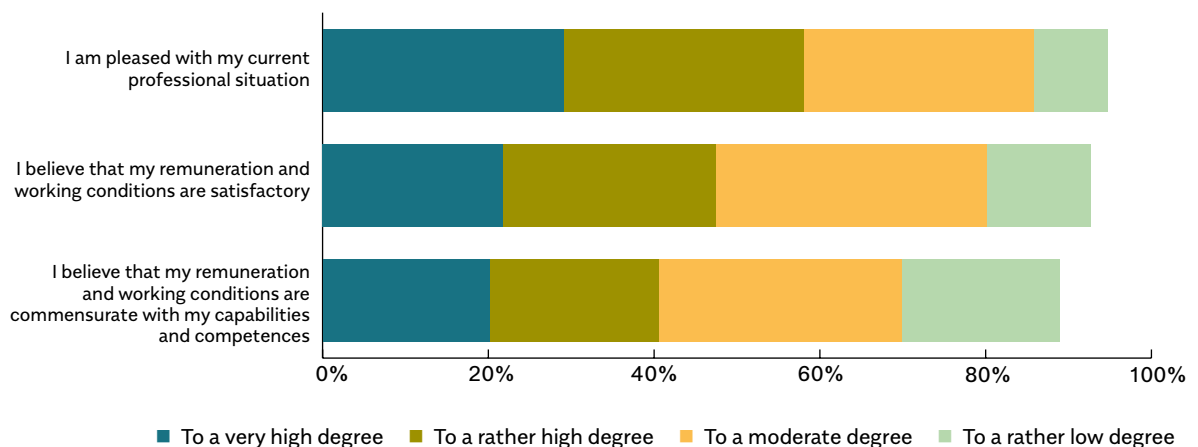
Especially young graduates who had just entered the labour market believed that their current professional situation should be treated as a “transitional period” and not the fulfilment of their expectations.

**Figure 7: Responses to the questionnaire. Form of employment of the former trainees (multiple choice question)**



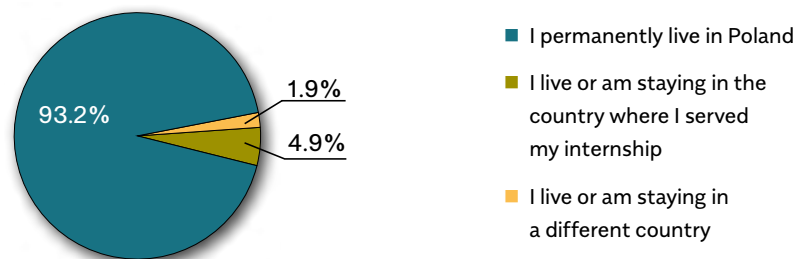
It can be concluded that for former students active on the labour market (regardless of the industry they work in) good working conditions are of primary importance, both these relating to compensation and these viewed from the perspective of further professional development. More than two thirds of the respondents declared that they would like their work to be well-paid. What is important, only a relatively small number of respondents declared that they would like to find a job which would involve little responsibility or to find any employment. Therefore, it can be inferred that it was very important for the respondents to find a job that would be satisfying to them. This is confirmed by the declarations of respondents made during the interviews, where they also stressed the importance of job satisfaction and of opportunities for professional development. What is more, a significant share of interviewees confirmed that they continued learning and participated in a wide variety of training courses, combining such activity with work. There were also declarations that participation in mobility abroad impacted on such decisions.

**Figure 8: Responses to the questionnaire. Satisfaction with working conditions.**



The study also showed that the individuals who participated in mobility for training were also more ready to go abroad to seek employment there. More than 70% of respondents who were professionally active confirmed that internships and traineeships abroad significantly help young people look for a job in another country. However, it should be stressed that the vast majority of the respondents live in Poland and only less than 7% of them are abroad permanently or temporarily.

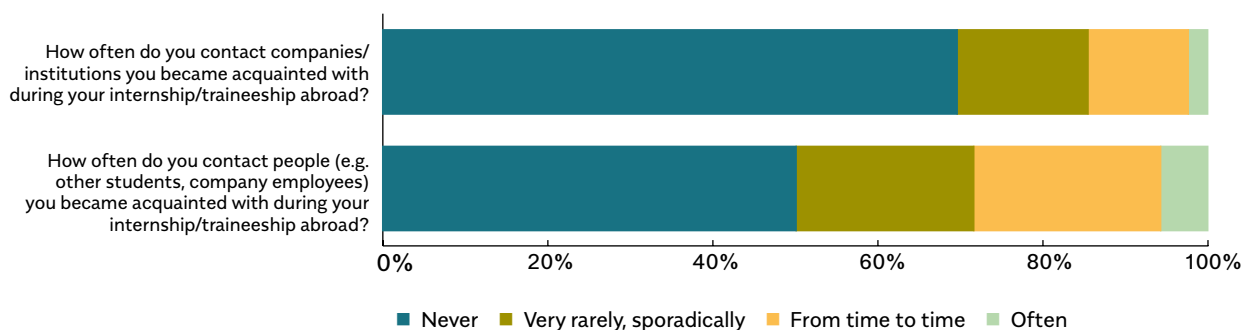
Figure 9: Responses to the questionnaire. Migration trends among the former trainees.



### Sustainability of contacts established abroad

One of the objectives of transnational learning mobilities is to facilitate international contacts. However, the study has shown that it is not always easy for young interns and trainees to establish durable professional contacts. This means that simply participating in a project does not guarantee building relational capital which in the future could help mobility participants to find work abroad. The results of the survey have confirmed that the vast majority of respondents do not maintain any contact with companies in the country where they were trained, and more than one half of the former mobility participants do not stay in touch with people they met during the mobility. Only slightly more than 2% of the respondents said they were frequently in touch with their host institutions and less than 6% confirmed that they maintained relationships established while in training abroad.

Figure 10: Responses to the questionnaire. Sustainability of contacts established with individuals and institutions during mobility.



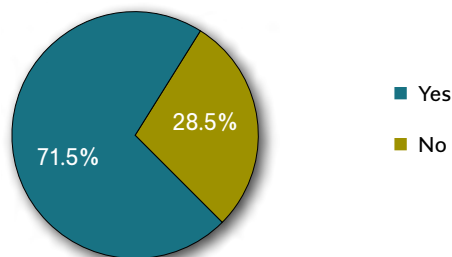
If the trainees did manage to establish sustainable relationships, most often contact with former colleagues and employers is maintained via e-mail, instant messaging applications and social media. Often it is mostly of a social nature, although some respondents said that after the training they received job offers from abroad. In the case of students, such offers mostly pertain to summer jobs and sometimes former trainees avail themselves of this opportunity.

The respondents also said that the durability of institutional contacts after mobility is mainly subject to initiatives taken by the host institutions, and former trainees expect to be contacted by their former employers. Unfortunately, the language barrier is the most frequently observed obstacle to such initiatives. Respondents often mentioned that their knowledge of foreign languages was not sufficient to establish or maintain social contacts, not to mention professional ones, with people from other countries. Problems with insufficient knowledge of the language were mostly experienced by persons who served their internships in countries where it was difficult to communicate in English or German (e.g. in Italy, Greece and Spain).

## Training abroad and work in Poland

Due to the fact that transnational mobility formed part of a longer training period for most of the respondents, upon their return from abroad students often underwent additional training with Polish employers. More than 80% of the survey respondents confirmed that training abroad allowed them to become acquainted with a work system and context different from the ones observed in Poland. The majority of school graduates agreed that such an experience had a significant impact on their professional careers. However, it was emphasised that such impact was dependant on many factors, such as the length of stay, the nature and extent of work, recruitment criteria and the quality of organisational arrangement and mentoring provided. The majority of the respondents noted significant differences between work experience in Poland and abroad (less than 30% saw no difference between gaining practical experience at home and abroad). Most of the respondents were more enthusiastic about their work experience abroad, and they noted that more positive assessment of traineeships abroad was not so much due to the mere attractiveness of a trip to another country as to better organisation of training, which formed a coherent part of the learning process.

**Figure 11: Responses to the questionnaire. Summary of responses to the question: *Apart from the internship/traineeship abroad, have you participated in on-the-job training in Poland?***



Regardless of the type and character of the institution in which they were trained, the vast majority of the respondents were very pleased with the working conditions and praised the infrastructure and the availability of appropriate equipment. Former trainees also mentioned that many of the solutions they observed abroad could be successfully applied in Poland. Among these they stressed good organisation of work at host institutions and the commitment of mentors. While mentors in Poland rather focus on administrative and pedagogic supervision, their foreign counterparts primarily concentrate on the substantive part of the traineeship. In the opinion of the respondents, the role the mentors played had a big impact on the participants and often proved critical in the process of acquiring practical knowledge and new skills.

Former trainees also suggest that a good mentor motivated them to work, created a favourable atmosphere and was able to notice predispositions of individual students. Moreover, the mentors aimed at showing the trainees different types of work and teaching them many aspects of their occupation. This seems particularly important in the context of career prospects of mobility participants. The more they learned about their occupation, the greater their knowledge about the requirements of prospective employers.

In the opinion of the respondents, it was not always possible to see the substantive relationship between the training they underwent at home and abroad. Such a relationship to a large extent depended on the strategy adopted by the school and the level of commitment of supervisors and people responsible for the organisation of training at each school. Although at some schools training abroad was planned in such a way that it supplemented the work experience offered, at other establishments the process seemed more or less random. Former trainees who attended schools which cared about linking the mobility with training offered back home more often stated that thanks to combining the two training programmes they were given the opportunity to experience a wide spectrum of occupational duties, and as a consequence gained more comprehensive knowledge of their future occupation. In addition, the respondents noted that the lacking connection between the training programmes organised in Poland and abroad could also result from a tough negotiating position of Polish schools against foreign intermediaries offering training opportunities. Sometimes, foreign partners imposed a predefined schedule and substantive scope of internships. Respondents also pointed out negligence of persons responsible for planning the mobilities offered by the schools and ensuring their quality.

Lack of a coherent strategy for planning training at home and abroad, which former trainees would welcome, resulted from the fact that they often had to find Polish employers willing to take on a trainee themselves. If a given school allowed students freedom in the selection of a training venue and did not interfere too much in it, any correlation of training periods in Poland and abroad was virtually impossible. If the students were responsible for finding their own training venue, lack of information about the internship contents and the organisation of work also proved problematic. In the opinion of the participants such a strategy would help students better choose the training venue and agree the training programme more thoroughly. These issues proved very important for more ambitious former trainees who already at the stage of learning tried to strategically plan the development of their future careers. Some of the respondents complained that Polish employers were not interested in their skills acquired during the training abroad, which in their opinion was evidenced by the fact that the tasks they were given at Polish companies were too easy and unpleasant.

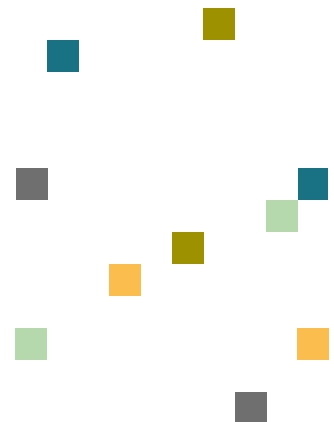
## Summary

The former interns and trainees believe that work experience abroad enriches on-the-job training and boosts employability. The vast majority of the respondents perceive learning mobility as an important element of their training which goes beyond formal education and at the same time provides them with a taste of adult responsibilities and autonomy coupled with an opportunity to try their hand at the world of work.

Thanks to the learning mobility abroad, students can not only improve their language skills and become acquainted with the culture of the host country but also, and most importantly, experience a different approach to learning and acquiring occupational skills and other training methods typical for different educational contexts. The respondents believe that internships and traineeships abroad not only help them develop occupational competence but also have an impact on their soft skills, thanks to their staying in a different culture and environment and being active on a divergent labour market.

Last, but not least, mobility is an answer to the needs of vocational school students in Poland. The study has shown that many respondents had had crystallised expectations concerning their professional career development already at the point of selecting their school and possessing practical skills was more important to them than holding a university diploma. The vast majority of the respondents confirmed that they would recommend training abroad to persons who are about to enter the labour market.

Although learning mobility forms an important component supporting the learning process at a growing number of schools in Poland, many schools still lack a coherent strategy for planning training programmes at home and abroad. The former mobility participants think that synergy between transnational mobilities and training at home significantly improves the quality of practical training. Former students of schools which ensured such coherence believed that thanks to the combination of the two training programmes they could better understand the job duties in their occupations and gained a more comprehensive knowledge of their future occupation.



# Main findings from the National Report on the Implementation and Impact of Erasmus+ and other evidence-based analyses in Italy

By **Lorenza Venturi, Elena Bettini, Angela Miniati and Luisella Silvestri**

## Abstract

The article presents the main research activities undertaken by the Italian Erasmus+ NA INDIRE, in particular the study carried out in cooperation with Istituto Piepoli which targeted 1,800 respondents from among HE students, school teachers, rectors and school masters, both mobile and non-mobile, to investigate their motivations, expectations, degree of satisfaction and degree of fulfilment of cultural and didactic objectives in relation to their Erasmus+ experience. Also, impact at the organisational level was analysed in terms of internationalisation as well as changes in the management and in the curricula offered.

## Introduction

INDIRE, the Italian National Institution for Documentation, Innovation and Research in Education, is the oldest research institute of the Italian Ministry of Education, University and Research. Since the beginning INDIRE has accompanied the evolution of the Italian system of education by investing in innovation and supporting the process of improving and introducing innovations in all educational institutions.

INDIRE has a long European experience: since 1985 it has been part of the Eurydice network of information on education systems and policies and since 1995 it has been a National Agency for the European programmes of cooperation in education – Socrates, Lifelong Learning and now Erasmus+. It manages the sectors of school, higher and adult education, and hosts the eTwinning and EPALE National Support Services. In 2014, a new Unit called “Studies and Analyses” was set up, in charge of conducting studies on the impact of the programme at individual, organisational and systemic levels, both for individual mobility (Key Action 1) and cooperation (Strategic Partnerships, Key Action 2).

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## Main evidence-based analyses carried out by INDIRE

The first study was published in 2015 with the title “Mobility in Erasmus+. First Results for the School, Higher Education and Adult Sector”<sup>1</sup> and contains an **analysis of the first one-year KA1 mobility projects accomplished in 2015**, highlighting critical points and innovative aspects brought about by the new Programme and their initial impact on the participating organisations. The main methodologies adopted were elaboration of information contained in the participant reports in Epluslink and in the *Mobility tool*<sup>2</sup>, along with focus groups and case studies.

In 2016, in view of the mid-term evaluation of the programme and of the “National Reports on the implementation and impact of Erasmus+” to be prepared in each country by National Authorities with the cooperation of National Agencies, further evaluation activities were planned and carried out for all the sectors.

**Targeted questionnaires** were drafted and administered to selected stakeholders, specifically:

- 253 organisations active in higher education (434 answers);
- 174 eTwinning Ambassadors<sup>3</sup> for the school sector;
- 79 Erasmus+ evaluators (school, higher and adult education);
- 17 EPALE Ambassadors and 15 recurrent beneficiaries for adult education;
- 23 officers responsible for EU cooperation at the Regional School Offices of the Ministry of Education.

Furthermore, for the adult sector, a targeted questionnaire for AE stakeholders was published on the EPALE platform and 178 answers were gathered. Another questionnaire, more specifically analysing the management and the efficiency of Erasmus+, was administered internally among NA staff, after group discussion.

In line with the evaluation criteria adopted for the mid-term evaluation, the main criteria inspiring the analysis were: effectiveness (i.e. the extent to which objectives of an intervention are achieved); efficiency (i.e. the extent to which the desired effects are achieved at a reasonable cost); relevance (i.e. the relationship between needs and problems in society and the objectives of the intervention); EU added value (meaning that the effects are due to EU intervention, not other factors) and coherence (i.e. the extent to which the intervention does not contradict other interventions with similar objectives).

### KEYWORDS

ERASMUS+ IMPACT,  
LEARNING MOBILITY,  
TRAINING MOBILITY, IN-  
SERVICE TRAINING FOR  
TEACHERS

<sup>1</sup> The publication is downloadable at: [www.erasmusplus.it/quaderno-1/](http://www.erasmusplus.it/quaderno-1/) (in Italian)

<sup>2</sup> Epluslink and Mobility Tool are IT Tools for the management of the Erasmus+ programme provided by the European Commission.

<sup>3</sup> eTwinning and EPALE Ambassadors are experts – respectively from the school and the adult education sector – that cooperate with the INDIRE National Support Service at a regional level.

As a whole, the interviewed stakeholders and the general public agreed on the following main points:

- In Italy the Programme is very popular and the volume of applications is high (the highest in the EU, second only to Turkey for the school sector), so the success rate in being awarded a grant is between 10% and 20% for all actions. This brings about a risk of disillusionment and disaffection. Potential beneficiaries, such as teachers and trainers, might think “the programme is not for us; Europe does not cater for our needs”. Their view is that **the Programme should be more inclusive**.
- Out of the two actions managed at the national level (KA1 Mobility and KA2 Cooperation), **mobility is the action with the greatest impact**, because it fosters the personal, cultural and professional growth of participants and builds a real European citizenship. It offers the best value for money and should be funded further.
- In particular, two actions that were discontinued – **long term mobility of school pupils and adult learner mobility – should be reintroduced** (in KA1 and not only as a possible side activity of cooperation), because they were very successful, met the needs of participating young people and mature learners, were very desired by families and were a good “marketing tool” for schools.
- In the university sector, parallel to International Credit Mobility, which offers opportunities for European students to study in higher education institutions beyond Europe, the programme should also offer the possibility of participating in **training activities in non-European countries**<sup>4</sup>.

Moreover, other desiderata were expressed, such as:

- Conducting an analysis of the real **needs of the labour market** in order to develop targeted projects;
- Promoting exchange of good practices;
- Establishing effective **school networks** and giving more prominence, through national information tools, to positive results obtained locally; and
- Raising awareness among stakeholders to facilitate the process of **sustainability of successful outcomes**.

As already mentioned above, all these results were fed into the National Report on the Implementation and Impact of Erasmus+ and were further disseminated.

## Impact evaluation research in cooperation with Istituto Piepoli

Besides all the above-mentioned evaluation exercises carried out by the INDIRE NA autonomously, an extensive study was carried out in cooperation with a well-known independent research and statistical analysis institute in Italy, the Istituto Piepoli. Its aim was to measure the impact of Erasmus+ (in order to analyse longer-term effects, the predecessor Lifelong Learning Programme 2007–2013 was also included), to analyse its implementation, evaluating its strengths and weaknesses, lessons learned and best practices, focussing on both quantitative and qualitative aspects and comparing them with the objectives as defined in the Erasmus+ Regulation.

“The research on the impact of the Erasmus+ programme on the education and training systems in Italy” had the following methodological qualitative-quantitative structure:

### School Sector

- INDIVIDUAL TARGET – QUANTITATIVE ANALYSIS: School staff (head teachers, teachers and other staff, plus pupils)

<sup>4</sup> Traineeship for HE student in Partner (non EU) countries has been introduced as of Call 2018.

→ SYSTEMIC TARGET – QUALITATIVE ANALYSIS: Schools at all levels

**University/Higher Education Sector**

→ INDIVIDUAL TARGET – QUANTITATIVE ANALYSIS: Students, professors, rectors or International Relations delegates

→ SYSTEMIC TARGET – QUALITATIVE ANALYSIS: Higher education institutions

The **individual target** was analysed through 1,810 telephone interviews with CATI methodology<sup>5</sup>, carried out between October 2016 and February 2017, exploring two “twin samples”:

→ For the main research sample, 905 telephone interviews were carried out (203 interviews for the school sector and 702 for the higher education sector) with teachers/students that had benefitted from at least one grant for learning mobility in the Erasmus+ (post 2014) and/or Lifelong Learning Programme (2007–2013).

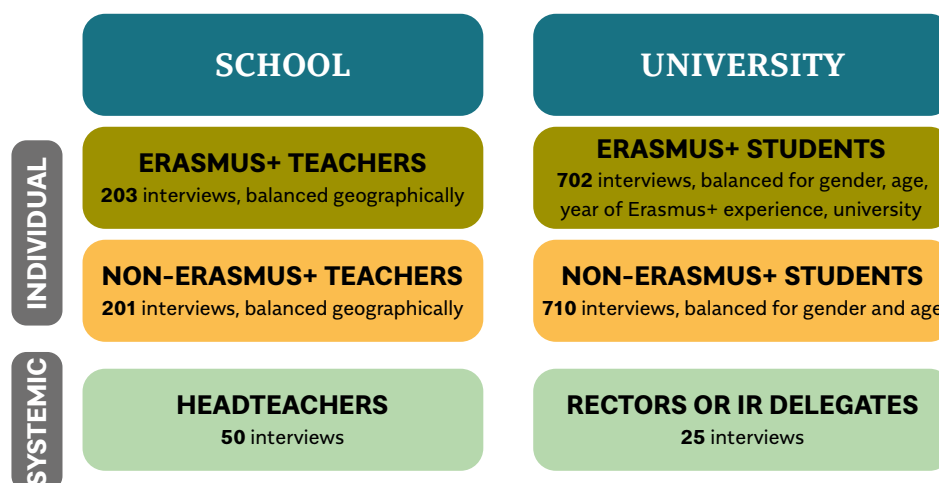
→ In the control group, 911 telephone interviews were carried out (201 for the school sector and 710 for the university sector) with teachers and students selected out of a sample representative of the general Italian adult population excluding male and female individuals who had participated in Erasmus+ or predecessor programmes. The twin samples were constructed adopting the same variables in parallel: age, sex, geographic area and type of employing school for the teachers group; age, sex and qualification for the university students group.

The **systemic target** was analysed through 75 interviews based on the QUALITEL methodology, which consists of in-depth colloquia lasting 30–45 minutes carried out over the phone by previous appointment, conducted by specialised psychologists with Erasmus+ contact persons, namely:

→ SCHOOL SECTOR: 50 telephone interviews with Head teachers of both primary and secondary schools that implemented one or more cooperation projects;

→ UNIVERSITY SECTOR: 25 telephone interviews with Rectors or International Relations delegates of Italian universities or other higher education institutions.

#### Structure of the research



In terms of results, similar trends are registered across all sectors.

<sup>5</sup> Computer-assisted telephone interviewing (CATI) is a telephone surveying technique in which the interviewer follows a script provided by a software application.

## School sector

The research confirms absolutely positive feelings towards the experiences in question. Learning/training mobilities carried out in the framework of the Lifelong Learning and Erasmus+ programme stand out for **their precious value in terms of both personal and professional growth**. The two programmes are equally appreciated by both the individual and the systemic target.

Target group: nearly all the interviewed teachers declare that the mobility period fully met their expectations and that the envisaged didactic and cultural objectives were reached. The in-service training abroad is not only a source of **methodological innovation** and **sharing of work experiences** at an international level but also an occasion for a **cultural and personal exchange** which results in a **wider professional network** and an **improvement of the teachers' own soft skills**.

According to the school contact persons involved in the qualitative analysis, the most substantial changes affected the professional development of the mobile staff. On the other hand, the impact on the participating institutions appears to be less evident.

Figure 1. Did the activities implemented during your in service training abroad with Comenius/Erasmus+ match you expectations and were you able to reach your learning goals?



N = 203 respondents

More specifically, the Istituto Piepoli/INDIRE research shows that the following skills are the most affected:

- **Language skills** improvement (96%);
- Acquisition of **new teaching methodologies** (28%);
- **Exchange of experience** with foreign teachers/intercultural exchange (17%);
- **Transferability** of the acquired competences: the large majority of mobile teachers declare that, on their return, they were able to put in practice the newly acquired teaching methodologies in their own classroom and in the school (88% and 77%, respectively).

Control group: the same views are shared, in parallel, by non-mobile teachers, when asked about their opinion about the programme. Indeed, the teachers from the control group largely consider the possibility of training in another country a great opportunity for growth. 86% of them declare that such an experience has an added value both in terms of personal (93%) and professional (90%) growth.

Figure 2. Do you think a training activity abroad has an added value compared to a training activity at home?

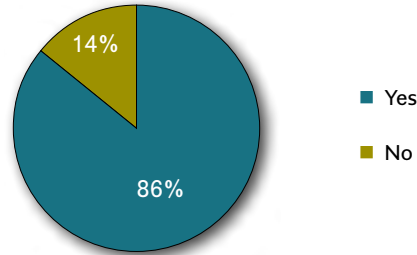
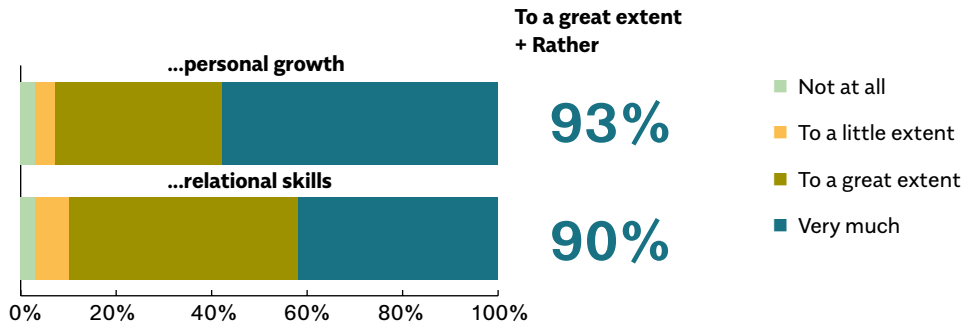


Figure 3. Can European cooperation programmes help improve teaching methods and cultural growth in terms of...



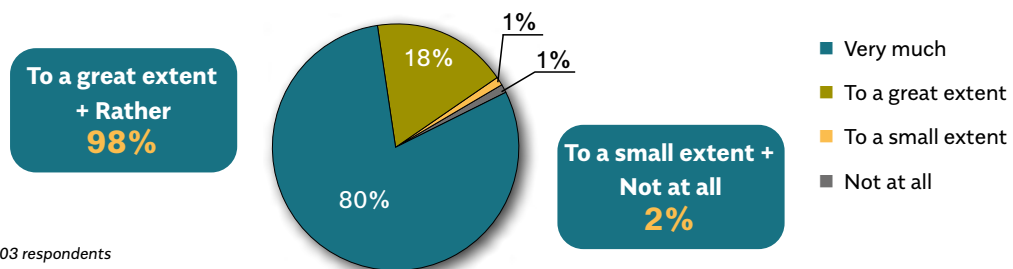
N = 203 respondents

### Higher education sector

A largely positive opinion on Erasmus+ and the predecessor LLP is expressed also by the university sector. **The mobility experience is seen as an occasion for personal, social and professional growth.**

Nearly all of the interviewed mobile students declared satisfaction with the experience. 98% of them declared to have **reached their personal learning objectives** – a percentage even higher than in the case of teachers. Among the most appreciated features are the possibility to experience a full immersion in a different environment and to acquire competences that could not be gained at the home institution. This view, which is shared by 93% of the interviewed students, can be exemplified with some “cornerstone competences”, such as the improvement in foreign language competences (55%), the acquisition of new study methods (31%) and the creation of relationships with different cultures (19%).

Figure 4. Did you reach your personal learning goal during your study/training period abroad with Erasmus+?

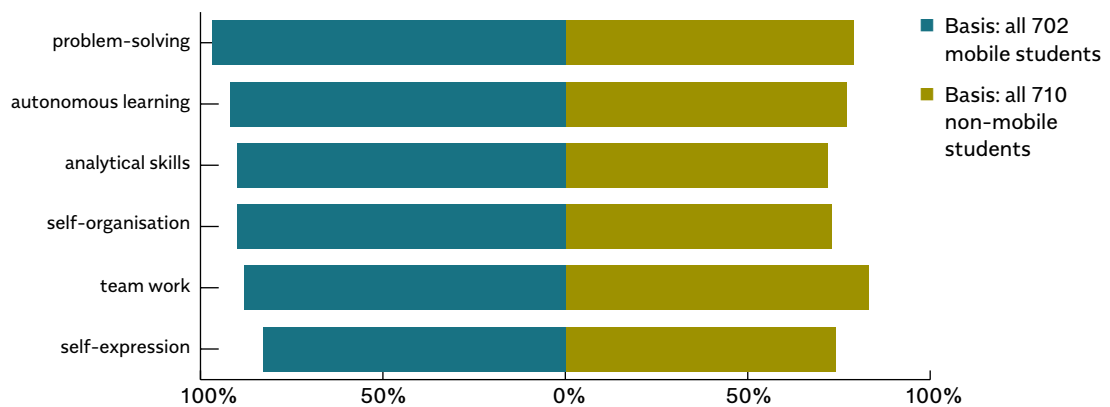


N = 203 respondents

Control group: In this regard, the non-mobile students interviewed expressed the same opinions as their mobile counterparts: both groups think that the Erasmus+ experience is very useful in terms of personal and relational growth.

The research paid particular attention to identifying the competences developed thanks to the learning/training mobility. What emerges quite clearly is that **mobile students develop their problem-solving abilities**, i.e. the ability to find solutions to difficult or complex issues/situations, along with the **capacity to plan their learning autonomously**, and the **improvement of their analytical skills**.

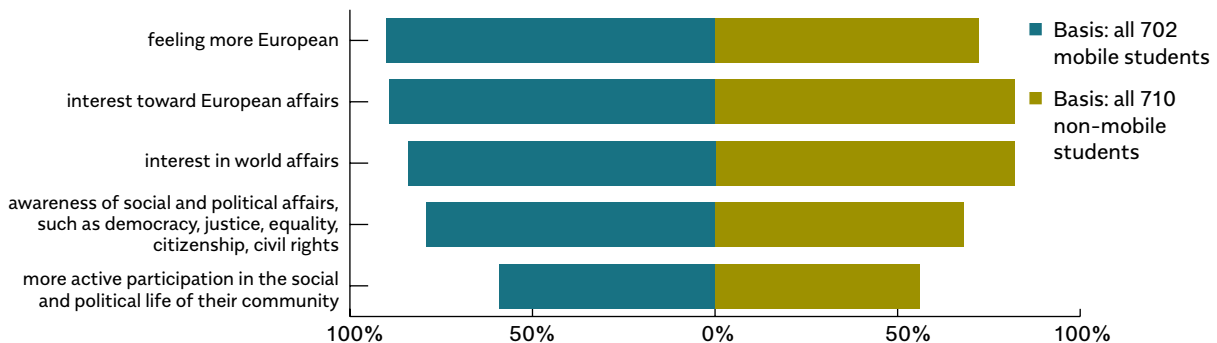
Figure 5. To what extent do you think Erasmus mobilities improved participants' professional and cultural activities in terms of...



N = 702 mobile students and 710 non-mobile students

As far as citizenship is concerned, the mobility period greatly **enhances the feeling of being European**, as well as increases interest in and awareness of European affairs and, in general, events happening in the world.

Figure 6. To what extent do you think Erasmus mobilities improved participants' professional and cultural activities in terms of...



N = 702 mobile students and 710 non-mobile students

Last but not least, mobile and non-mobile students show a different performance as far as **employability** is concerned. If we compare students of the same age and with the same qualifications, the non-mobile group show a higher percentage of unemployment as opposed to the mobile group (18% vs 6%).

Despite the fact that the benefits of participating in the Erasmus+ programme are generally perceived and acknowledged in a transversal way by all groups, **a significant share of potential beneficiaries still do not take part in it**. The reasons for this have mainly to be sought in logistic (especially lack of time) and economic difficulties (costs, inadequate grant), that still represent the main obstacles to mobility.

Figure 7. For which reasons did you not apply for an in-service training mobility abroad with Erasmus+?

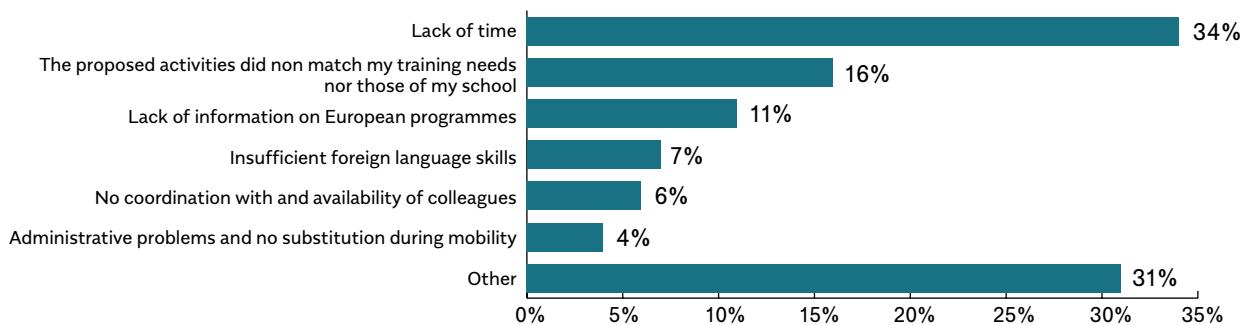
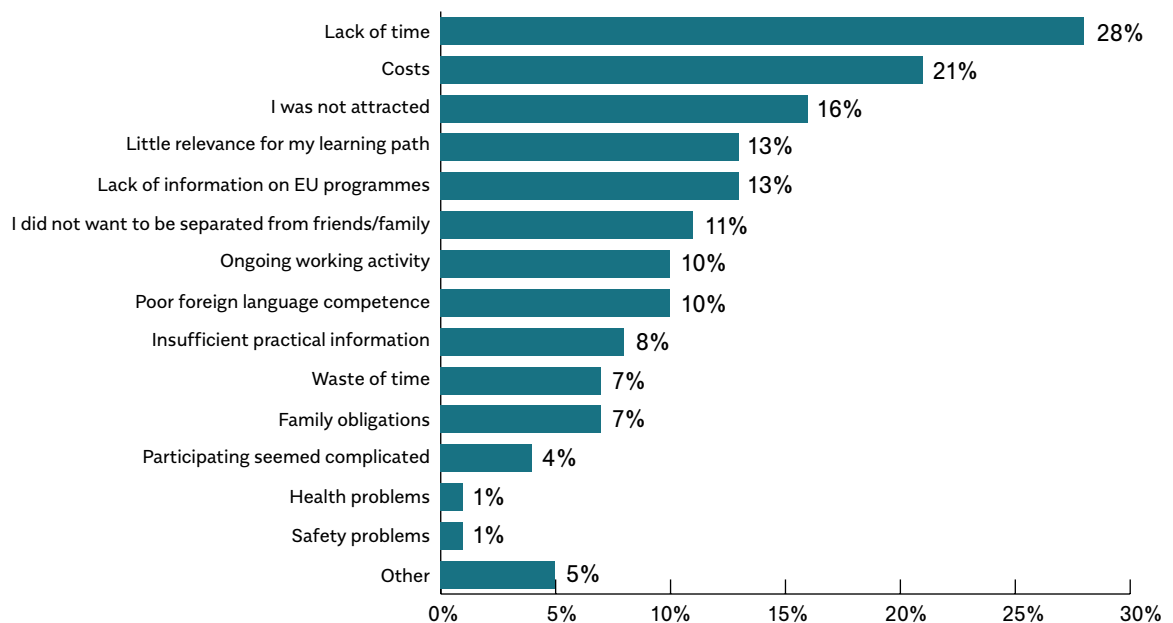


Figure 8. Given the possibilities offered by the Erasmus+ programme to HE students, why did you never apply for a study or training mobility?



N = 710 non-mobile students

The complete study is published on INDIRE's website (in Italian, soon also in English) <http://www.erasmusplus.it/studio-erasmus-scuola-e-universita>

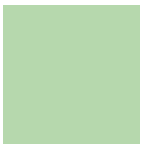
## Conclusions

The article has reviewed the main evidence-based analysis exercises conducted by the INDIRE National Agency since the start of the Erasmus+ programme.

The main findings are similar across all the sectors taken into consideration – school, higher and adult education – with nearly all of the interviewed participants declaring that they are satisfied or even very satisfied with the learning/training mobility. Moreover, they claim to have experienced personal, social, cultural and (if applicable) professional growth. At an individual level, a tangible improvement in key competences is also to be noted, namely: language skills, new teaching/studying methods, and other soft skills, particularly problem-solving. On the other hand, a systemic impact on the participating institutions is also demonstrated, although somewhat less evident.

The INDIRE NA will continue its research activity in 2018 with a study on the impact and added value of cooperation in education, namely with Erasmus+ Strategic Partnerships.





Home

# Impact and sustainability of the Erasmus+ Programme Key Action 1 Mobility Projects for School Education Staff

By Jūratė Valuckienė, Milda Damkuvienė and Sigitas Balčiūnas as leading experts<sup>1</sup>

## Abstract

The 1st part of the article provides an overview of the main concepts and results of the impact study concerning Erasmus+ Mobility Projects for School Education Staff that was carried out in five European Union countries (Estonia, Finland, Germany, Lithuania and Poland). The 2nd part of the article focuses on the results of the impact study in Lithuania.

## The main concepts of the research

### Background

The research **“Impact and Sustainability of the Erasmus+ Programme Key Action 1 Mobility Projects for School Education Staff”<sup>2</sup>** was initiated by the *Education Exchanges Support Foundation*<sup>3</sup> (Lithuania) as part of the Erasmus+ Programme (hereafter: Erasmus+) Transnational Cooperation Activity with the following National Agencies: *Archimedes Foundation (Estonia)*, *Centre for International Mobility (since 2017 – Finnish*

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**KEYWORDS**  
ERASMUS+ MOBILITY OF SCHOOL EDUCATION STAFF, TEACHERS’ PROFESSIONAL DEVELOPMENT ABROAD, IMPACT AND SUSTAINABILITY OF ERASMUS+ MOBILITY PROJECTS, SCHOOLS’ STRATEGIC DEVELOPMENT, SCHOOL ENVIRONMENT

- <sup>1</sup> The research “Impact and Sustainability of the Erasmus+ Programme Key Action 1 Mobility Projects for School Education Staff” was initiated by the Education Exchanges Support Foundation (Lithuania) as a part of the Erasmus+ Programme Transnational Cooperation Activity with the following National Agencies: Archimedes Foundation (Estonia), Centre for International Mobility (since 2017 – Finnish National Agency for Education; Finland), Pädagogischer Austauschdienst der Kultusministerkonferenz, Nationale Agentur für EU-Programme im Schulbereich (Germany) and Foundation for the Development of the Education System (Poland). Contractors (national experts) in each country carried out the research using the same methodology and research instruments. National reports were prepared on the basis of a common template to ensure, to the extent possible, comparability of results. National experts included: Halliki Harro-Loit, PhD, Juta Jaani, MA, Jaanika Piksööt, MSc, Regina Lapp, MA (Estonia), Satu Niemelä, MA (Finland), Prof. Dr. K. Schäfer-Koch (Germany), Michał Pachocki, MA, PgD (Poland). Initiator of the study: Education Exchanges Support Foundation, <http://www.smpf.lt>; address: Rožiu al. 2, LT-03106 Vilnius, Lithuania.
- <sup>2</sup> Link to the Transnational research report: <http://erasmus-plus.lt/uploads/files/impact-sustainability-of-the-erasmus-programme-ka1-mobility-projects-for-school-education-staff.pdf>. Link to the Transnational research report in brief: <http://erasmus-plus.lt/uploads/files/impact-sustainability-of-the-erasmus-programme-ka1-mobility-projects-for-school-education-staffreport-in-brief.pdf>
- <sup>3</sup> The Education Exchanges Support Foundation is a Lithuanian National Agency entrusted with the administration of the Erasmus+ Programme and other initiatives funded by the European Commission and the Government of the Republic of Lithuania in the field of education and vocational training

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The research was carried out in five European Union countries (Estonia, Finland, Germany, Lithuania and Poland)<sup>4</sup> between January 2015 and June 2016. It assessed the projects funded under the Erasmus+ Call for proposals 2014 and some selected projects from the year 2015.

### **Erasmus+ KA1 Mobility Projects for School Education Staff**

The main aim of the Erasmus+ Key Action 1 (KA1) Mobility Projects for School Education Staff (hereafter: mobility projects) is to develop school staff competencies by offering professional development opportunities abroad. Erasmus+ KA1 mobility projects support the professional development of school staff through mobility which can take the forms of structured courses, job shadowing or teaching.

#### **Reasons for conducting the research:**

- applicants' difficulties in taking into account the new strategic approach introduced in Erasmus+;
- a significant increase of the grant amount per school as the mobility of teacher teams is supported;
- introduction of the consortium model in 2015.

#### **Research aims:**

- to evaluate the impact and recognition of teachers' professional development through the Erasmus+ KA1 mobility of staff in the school community;
- to estimate the factors that enhance the changes driven by Erasmus+ KA1 mobility in schools;
- to evaluate the alignment of Erasmus+ KA1 mobility with strategic aims of schools, identifying good transferable practices in terms of impact and sustainability.

<sup>4</sup> Links to the National research reports: Estonia [http://archimedes.ee/wp-content/uploads/2017/01/%C3%95pir%C3%A4nde-m%C3%B5ju\\_%C3%B5ppversioon.pdf](http://archimedes.ee/wp-content/uploads/2017/01/%C3%95pir%C3%A4nde-m%C3%B5ju_%C3%B5ppversioon.pdf); Finland [http://www.cimo.fi/instancedata/prime\\_product\\_julkaisu/cimo/embeds/cimowwwstructure/111811\\_National\\_Report\\_Finland\\_FINAL.pdf](http://www.cimo.fi/instancedata/prime_product_julkaisu/cimo/embeds/cimowwwstructure/111811_National_Report_Finland_FINAL.pdf); Germany <https://www.kmk-pad.org/index.php?id=626>; Lithuania <http://erasmus-plus.lt/uploads/files/2015-12-18i-national-report.pdf>; Poland [http://czytelnia.frse.org.pl/media/frse-raport-nauczyciele-ENG-2017-01-04-a\\_VZ9jBQM.pdf](http://czytelnia.frse.org.pl/media/frse-raport-nauczyciele-ENG-2017-01-04-a_VZ9jBQM.pdf)

## Theoretical background of the research

The research idea is based on Erasmus+ aims (and expected outcomes) and grounded in the following theoretical concepts: teachers' professional development, the international dimension of education, leadership for learning, evaluation and recognition of professional development, strategic staff management.

## Research organisation

Contractors (national experts) in each country carried out the research using the same methodology and research instruments. National reports were prepared on the basis of a common template to ensure, to the extent possible, comparability of results.

### Research methods

Qualitative and quantitative research methods that were employed in this research:

- online survey for mobile staff<sup>5</sup>, non-mobile staff<sup>6</sup>, students (15 years and older) and parents<sup>7</sup>;
- focus groups with principals of schools which received the grant and with mobile staff;
- case studies: interview with school (consortium) leaders; focus groups with mobile staff as well as non-mobile staff; analysis of strategic documents of schools (founders of consortiums); case selection in this research snapshot is based on the recommendations of National Agencies;
- data analysis methods: descriptive and inferential statistics, path analysis methods, descriptive qualitative analysis.

## Characteristics of the research sample

The total online survey sample (N = 5,024) consisted of four groups of respondents: mobile staff (N = 1,319), non-mobile staff (N = 1,153), students (N = 1,561) and parents (N = 991). The total number of educational institutions was 288.

Characteristics of the survey research sample					
Country	Mobile staff	Non-mobile staff	Students	Parents	Number of educational institutions
Estonia	112	175	466	222	23
Finland	127	123	150	109	56
Germany	512	142	-	-	131
Lithuania	218	283	549	231	32
Poland	350	412	596	429	46
<b>Total</b>	<b>1,319</b>	<b>1,135</b>	<b>1,761</b>	<b>991</b>	<b>288</b>

<sup>5</sup> Mobile staff – teachers, school administration and other school staff who participated in Erasmus+ KA1 mobility

<sup>6</sup> Non-mobile staff – teachers, school administration and other school staff who did not participate in Erasmus+ KA1 mobility

<sup>7</sup> Student and parent surveys were not carried out in Germany

The total qualitative research sample (focus groups and interviews) – 93 respondents, 13 case studies (3–4 cases from each country).

Characteristics of the qualitative research sample			
Country	Focus groups and interviews (N of staff)		N of case studies
	Mobile staff	School principals	
Estonia	4	8	3
Finland	8	10	3
Lithuania	24	14	4
Poland	25	*	3
<b>Total</b>	<b>93</b>		<b>13</b>

\*together with teachers

## Impact – a perception of change

Impact is defined as Erasmus+ KA1 mobility produced outcomes having an effect on the individual and school level. Impact refers to the changes that occur in teachers' professional competencies and within the school as a result of Erasmus+ KA1 mobility. The reported approach of school staff / community (perception of the direction and magnitude of change) is used for measuring change.

The study analyses the impact of the mobility projects on school staff on two levels: the *individual level* (impact on teachers) and the *school level* (impact on the school as an organisation).

Impact on teachers (self-reported changes in teachers' professional competencies):

- openness to innovation in education;
- intercultural competencies;
- didactic competences.

Impact on the school (self-reported changes within the school):

- changes in students' learning and motivation;
- changes in curriculum and teaching methods;
- changes in school culture (strengthening of the international dimension).

Sustainability is the capacity to continue with and maintain the project outcomes and use the results beyond the end of the funding period. For proof of sustainability of project-related outcomes, long-term evaluations are necessary. Therefore, this research indicates the prerequisites for sustainability.

## Influencing factors

Teachers' activities:

- preparation for mobility;
- teacher leadership;



→ dissemination outside and inside the school.

School environment:

→ school structure and policies;

→ principal's support;

→ peer support.

## Conclusions

### **High satisfaction with professional development. Some criticism about the content of mobility.**

In all countries, participants are satisfied with organisational issues relating to Erasmus+ KA1 mobility (the experience of intercultural collaboration, timing, the responsiveness of the course provider, etc.). There is some critical feedback concerning the content of the courses. Estonian teachers who participated in job shadowing activities were more satisfied with the mobility than teachers involved in professional development courses. High satisfaction with the intercultural experience was more evident in Finland than in other countries.

**Increased teacher openness to teaching innovations.** The project's greatest impact is the increase of openness to innovation in education and the increase in teachers' knowledge of teaching methods: teachers became more open to changes, got the stimulus to change their teaching style.

### **Contribution of the Erasmus+ KA1 mobility to the implementation of the school strategy.**

Participants of the study in all countries agree that project ideas contribute to the implementation of the school strategy. A slightly weaker relationship between mobility aims and school long-term goals is seen in Germany. The willingness to improve the competitiveness of schools in the local market as the reason for mobility was highlighted in focus group discussions in Lithuania and Poland.

**Greatest perceived change – school culture. Perceived change in student learning results is less emphasised.** The study has shown that the Erasmus+ KA1 mobility contributed to changes in schools. School staff – those who participated in the mobility and those who did not – in all countries have noticed that more discussions on the idea of their school's internationality are held and the school community is becoming more open and tolerant. This fact is most evident in Lithuania and Poland. The importance of new personal contacts for development of new international projects was evident in all countries.

The lowest score in evaluating changes at the school level was given to changes in student learning results and motivation. Reluctance to take a stance on the impact of the mobility on student learning results has been particularly strong in Finland because of the prevailing student assessment system (based on continuing assessment of each student's work at school instead of on exams or tests).

**A significant success factor is thorough preparation for the mobility.** The majority of respondents emphasised the importance of preparing for the mobility (setting mobility aims, purposeful and thorough selection of courses, teamwork, staff involvement, sharing responsibilities). Dialogue between teachers and the leading staff during the preparation stage is crucial, because only then the needs of the teachers can be combined with the needs of the school. Preparation for mobility determines a higher

level of obtained competencies and higher scores ascribed to perceived changes at the school level. Teachers who put greater effort into preparation more often act as leaders, disseminate and implement their experience.

**The dependance of changes in teacher competencies on the form of professional development.**

The study results confirm that changes in teacher competencies depend on the chosen form of professional training. Job shadowing contributes more to developing intercultural competencies, whereas courses are more suitable for the development of didactical competencies.

**The significance of teacher leadership for the sustainability of project results.** The summarised results of the survey show an impact of teacher leadership on perceived changes at the school level. The greater the mobile teachers' leadership, the greater the perception of changes at the school level. Leadership is manifested through teaching staff initiatives to challenge the existing status quo, empower and inspire others, purposefully involve their peers in mutual learning, and search for support for the implementation of ideas. For example, in the Estonian case study the use of peer-to-peer training has considerably increased (participants of mobility have become trainers inside and outside the school; additionally, students have become teacher trainers).

**Dissemination – an important but insufficient factor in the sustainability of project outcomes.**

The summarised results of the survey show that although dissemination activities are necessary actions throughout the project's life, they are not a sufficient factor for ensuring the sustainability of changes in the educational process. For the sustainability of project results and their greater impact on students' progress, teachers' professional leadership is also necessary.

**The significance of a supportive school environment for project outcomes.** A favourable school environment for the implementation of ideas of Erasmus+ KA1 staff mobility manifests itself through the "friendliness" of school structures and policies, and the support of colleagues. Such a school environment is perceived as favourable. Support from and involvement of colleagues are the most important factors impacting the perceived changes at the school level.

**The importance of the school principal's role for project sustainability.** In all cases, school principals cared about the realisation of new ideas, backed them and created a supporting and motivating ethos at the school. A school principal's focus on project preparation and his/her influence on teachers to support mobile teachers' activities has an impact on the sustainability of the mobility results. The school principal's favourable and demanding position directly influences project outcomes: encourages teachers to prepare for a visit properly, supports teacher leadership and helps to create a favourable attitude towards mobility-related ideas in other teachers.

**Changes in teachers' behaviour are noticed by students.** Students notice the changes in the teaching process of teachers who have participated in a mobility abroad. Over 80% of students in Estonia, Finland, Poland and Lithuania declared that lessons had become more interesting, and over 70% reported that smart technology was used more often.

### **Students' high expectations for teachers' competencies in terms of internationality.**

Students in all countries note that a teacher's ability to speak a foreign language fluently, implement good foreign practices and organise international learning is important to them. Such responses from students reveal the demand for a common European Education Area caused by the common labour market.

**Recognition of mobile teachers' leadership.** The leadership of staff who participated in professional development abroad is noticed and recognised by colleagues.

**Parents' positive attitudes towards a school's internationality and teachers' professional development abroad.** Parents' attitudes towards teachers' professional development abroad were very positive in all countries. Parents highlight the importance of school education based on good international practice. Parents treat teachers' professional development abroad as an important factor in the improvement of teaching.

## **Recommendations**

Seeking greater impact of teachers' professional development on school strategic development and its sustainability, it is recommended:

### **To institutions coordinating the activities of Erasmus+ KA1 (the European Commission and National Agencies):**

- In order to increase the impact and sustainability of the projects, schools should be encouraged to put more emphasis on developing student-oriented practices and indicators for measuring the impact of the project.
- During the process of evaluating applications, focus on the quantity of formal dissemination events should be shifted. Priority should be given to more proactive experience sharing forms (professional workshops, labs, and other forms of collaborative working activities) with the aim to more actively involve colleagues in working together as a learning community with a shared responsibility to create learning experiences necessary to achieve the desired outcomes.
- National Agency initiated events, courses, and seminars for applicants should be not just information oriented but more focused on the development of strategic thinking and project competency.
- Promotional materials/activities using ICT technologies should be prepared to make it possible to introduce the programme to wider school audiences (parents, students). It is recommended that National Agencies include teachers and students in dissemination activities in order to present their personal experiences and inspire others to overcome their hesitations and take the decision to participate in mobility projects.

### **To municipality level politicians and administrators of education:**

- If follow-up studies are to be conducted, it is recommended to initiate them a reasonable period, e.g. 1–2 years, after project completion so that there is sufficient time to implement the changes.



→ In the case of administrators of the municipalities where Erasmus+ KA1 projects were implemented in a consortium model, it is recommended that they monitor the impact of the project on the local/regional environment and create favourable conditions for joining in experience sharing activities.

#### To school managers and teachers:

- Aspects of the impact and sustainability of an Erasmus+ KA1 project in terms of changes in student welfare and learning outcomes as well as school progress should be analysed and assessed as part of school self-assessment (finding links between the goals reached by the project and school performance indicators, foreseeing support and development of project outcomes).
- If language is an obstacle to professional development abroad, schools could use part of the organisational lump-sum on the development of language skills.
- Although participants assessed all mobility forms as necessary, choosing a combination of different forms of mobility is recommended – predominantly theoretical courses aligned with predominantly practical forms, like job shadowing and teaching.
- The engagement of the school principal in all project stages is highly recommended for the ensurance of the effectiveness and sustainability of project results.

## The main highlights of the research in Lithuania

Research methods and characteristics of the research sample

Research method	Description of the sample, research instruments	Outcome
Document analysis	The analysis of the application forms using a data analysis matrix. N = 31 (all applications which received grants, including consortium applications).	A given institution's perception on European development. The alignment of project aims with the European Development Plan.
Survey	<p><b>Online survey, 5 questionnaires for target audiences:</b></p> <p>Mobile teachers, non-mobile teachers, students (15 years and older), parents.            N (mobile teachers) = 218            N (non-mobile teachers) = 282            N (students) = 549            N (parents) = 231</p> <p>In total, 32 schools participated in the survey. Pre-primary institutions which received grants were excluded and consortium schools were calculated as separate entities.</p>	Impact and recognition of Erasmus+ KA1 (staff mobility) in a school's community (professional development of individual teachers, benefits for the institution, alignment with institutional goals, the institution's support in implementing and sustaining visit-related changes).

<b>Focus group with school leaders of schools awarded grants</b>	<b>Target audience</b> – school leaders. N = 14 (2 focus groups).	Impact and recognition of Erasmus+ KA1 mobility of staff, forms of institutional support, and alignment with institutional strategy.
<b>Focus group with mobile staff</b>	<b>Target audience</b> – mobile staff N = 24 persons (2 focus groups).	Staff experiences and benefits for professional development, alignment with institutional strategy.
<b>Case study</b>	4 cases (2 consortiums and 2 schools) <b>Consortium case study:</b> 1 in-depth interview with the leader of the consortium and 1 focus group with school representatives, document analysis (analysis of strategic documents), interview with representatives of the school authorities. <b>School case study:</b> 1 in-depth interview with the school leader, 1 focus group with mobile staff, 1 focus group with non-mobile staff, document analysis (analysis of strategic school documents).	Success factors of Erasmus+ KA1 mobility regarding staff recognition and sustainability. Experiences, challenges and opportunities in the process of integrating the international dimension into internal education policies. The role of the school authorities in successful change implementation.
<b>Interview with representatives of school authorities</b>	<b>In-depth interview. Target audience</b> – representatives of school authorities (representatives from the municipality).	

## Conclusions

### Results of the analysis of Erasmus+ KA1 applications show the following:

*Usually, in project applications the development of the European dimension in schools is understood and planned to be implemented at the individual level, i.e. development of a teacher's / school leader's intercultural and professional competences. A teacher who functions well in a constantly changing society, understands political, economic and social changes, is aware of the state policy of education and its European and global contexts, and has his/her own, clear competences of cultural, national and global identification is considered an important pre-requisite for increasing the internationalisation of an organisation.*

*Dissemination of experience in groups of colleagues, integration of new knowledge while improving the quality of a lesson, preparing/altering documents required for the implementation of educational policy: recommendations and education plans dominate as the selected activities for assuring project outcome sustainability. It was found that only a small number of schools (3 out of the analysed 31 cases) in their Erasmus+ KA1 applications plan to assess the impact of mobility-related ideas on students' learning outcomes which, from the researchers' point of view, is a significant indicator of the sustainability of teachers' professional development.*

*The need for development of teachers' general competences is dominant (55% of all applications). Talking more specifically about general competencies, implementing improvements in the content of education (education methods and strategies; 90% of all applications) as well as foreign language (English; 86% of all applications) competencies are in greatest demand. Less expressed is the need for the competence of assessing students' learning outcomes and progress (10% of applications), which implies lack of the belief that teachers' professional development is a means of improving students' learning outcomes and progress.*

### **Results of the survey make it possible to state the following:**

Participants of the Erasmus+ KA1 mobility programme for school staff are satisfied with the organisation of mobility visits, their experience of intercultural collaboration and the responsiveness of course providers to the needs of participants.

Preparation for the visit is a significant success factor. Some 60% of participants prepared for the mobility: searched for information about the system of education of the country they visited, searched for information on the topic of the mobility. One third of the respondents indicated that they attended foreign language courses. Staff with longer teaching experience prepared more thoroughly. The importance of administrative preparation for a mobility (formulating mobility aims, purposeful and thorough selection of courses, team work, staff involvement in project preparation, sharing responsibilities) was emphasised by the respondents.

*The research revealed that preparation for a mobility determines a higher satisfaction with qualification development, a higher level of obtained competences, and higher scores given when evaluating outcomes at the class and school level. Individuals who put more effort into preparation more often act as leaders, disseminate and implement their experience.*

The purposefulness of mobility is rated quite high in the survey. Respondents see actual links between mobility aims and school strategy. Some 90% of mobility participants and over 70 % of those who did not participate in a mobility agree that project ideas contribute to implementing the school strategy – one third of mobile staff and one fourth of those who did not participate are sure about this.

Project outcomes partially depend on the chosen form of professional training. Job shadowing contributes more to developing general competences, whereas courses are more suitable for the development of professional competences. Courses more often than job shadowing stimulate teachers to apply new teaching methods, modify educational content and change students' motivation. Better results of teachers' professional development are achieved when combining job shadowing with courses.

*Filling in applications causes project coordinators from schools in rural areas and smaller schools more problems.*

According to the perception of mobile staff, most significant changes are achieved in the development of general competences; almost all participants indicate an alteration of attitudes: teachers become more open

to changes and innovations. Changes in the area of professional competences are related to particular content of professional development. New knowledge on teaching methods is the most frequent outcome of teachers' professional development in Erasmus+ KA1 mobility.

School staff, both these who participated in a mobility and these who did not, usually notice changes caused by mobility in the area of school culture: more discussions on the idea of the internationality of the school are held, more openness and tolerance appear within the school community. *When evaluating changes taking place in the school after a mobility, the lowest scores are ascribed by respondents of both groups to the area of students' learning.* 10% of respondents notice that students work more actively and creatively during lessons, and that the motivation of students to learn increases.

Changes caused by mobility as outcomes of a project are acknowledged by students. Over 80% of students notice changes in the process of education. They state that *lessons conducted by teachers who participated in qualification development courses abroad become more interesting, smart technologies are used more often.* Fewer students point out changes related to the integration of a foreign language in the process of education. The majority of the changes mentioned are more often noticed by students from schools in rural areas.

The research revealed parents' positive attitudes towards teachers' professional development abroad. For all respondents in this group it is important that a school be based on good international practices. *Parents treat teacher professional development abroad as a factor of teaching improvement and a means for improving students' learning outcomes,* which should be not only a goal of the school but also an object of accountability for parents.

The research revealed students' high expectations concerning teachers' competences of internationality. *Approx. 90% of pupils note that teachers' abilities to organise international learning, implement good foreign practices and be fluent in a foreign language are important to them.* Such responses from students reveal the demand for a common European Education Area caused by the common labour market.

*The most popular form of experience dissemination is oral presentations within the school. This form is chosen by all schools that participated in the research.* Approx. 40% of the participants shared their experience through open lessons, shared knowledge with parents and prepared materials for the subjects taught. These activities were carried out in more than 75% of the schools. However, in some schools they were not recognised as such by peers who did not participate in the mobility. Such a situation warrants the conclusion that *accountability for the outcomes of teacher mobility in some schools was limited by formal dissemination of information.*

When implementing ideas of mobility visits in schools, leadership manifests itself through teachers' endeavours to change attitudes within an organisation, purposeful involvement of colleagues in learning, arrangement of group work, involvement of interested individuals and search for support for the implementation of ideas.

Leadership of staff who participated in professional development abroad is recognised by colleagues who did not take part in the project in almost 90% of the schools, teams for the implementation of new ideas are

brought together in 60% of the schools. The research revealed a significant impact of teacher leadership on outcomes of teachers' professional development (changes taking place in schools after mobility). Teacher leadership has a greater impact on changes in school culture, and a smaller impact on changes in the curriculum, students' motivation and learning practices.

Favourable school environment for the implementation of ideas of Erasmus+ KA1 staff mobility manifests itself through support of the school leader and colleagues. In the majority of cases, both the teachers who did and those who did not participate in mobility notice a more or less significant school leader, his/her concern for dissemination of project ideas in the school and interest in their implementation.

The research revealed a significant influence of a supportive school environment on project outcomes. *Approval, support and involvement of school leaders and colleagues are the strongest factors having an impact on the sustainability of project outcomes.* It is important to note that the direct influence of a school leader is not strong; however, his/her favourable and demanding position has an impact on other factors that directly influence project outcomes: it encourages teachers to properly prepare for a visit, supports teacher leadership, and helps to generate a favourable attitude towards mobility-related ideas in colleagues. Dissemination of information inside the school has virtually no impact on project results.

### **Results of the qualitative research reveal the following:**

*An exceptional characteristic and advantage of Erasmus+ KA1 projects is the purposeful and targeted support for teacher/school team activities. Team activities arranged and supported in all stages of the project enable the achievement of higher project outcomes and ensure their sustainability at the level of individual teachers, the school, and the district education system.*

Initiation of Erasmus+ KA1 projects is not only the prerogative of school leaders: initiation of international projects is also seen as a role of individual teachers. From the point of view of school leaders, changed procedures of organising teachers' professional development abroad also act as an instrument for managing strategic changes at the school, making it possible to look at the European dimension as part of the school's development strategy.

According to the participants' opinion, teachers' professional development abroad is related to the improvement of teachers', school leaders' and the school's public image. Formal recognition of professional development abroad is equal to a regular (local) teachers' professional development event, whereas *non formal recognition of participation in international professional development events among students and their parents is much higher. It enhances the prestige of both the teacher and the school and increases the school's competitiveness in the market of education services.*

Schools that received support for implementation of Erasmus+ KA1 projects strive to follow the requirements of the *Education Exchanges Support Foundation* in all stages of the implementation of a particular project. Schools have set criteria for selecting teachers to take part in mobility; in accordance with these criteria, the selection of teachers proceeded and the dissemination of outcomes of mobility visits was implemented at different levels. Essentially, participants are satisfied with the administration of projects at the

national level. *Dissatisfaction was expressed only with the quality of some courses and the lack of systematic information about professional development courses.*

From the point of view of the research participants, all forms of teachers' professional development abroad are useful. The selection of forms of job shadowing is essentially limited by teachers' foreign language skills. *A consortium as a new form of participation in professional development abroad is acceptable to project participants.* It meets the needs of the municipality administration at the local level of implementation of the educational policy and is very helpful in increasing the chances of small educational institutions to participate in international projects.

## Recommendations

### → To national level politicians and administrators in education.

In the case of institutions coordinating the activities of Erasmus+ KA1, it is recommended that they prepare, periodically revise and issue a catalogue of professional development courses for teachers organised abroad, thus increasing the possibility for schools to choose courses which better meet their needs.

Seeking greater impact of teachers' professional development on strategic school development and its sustainability, it is recommended to change the dominant form of experience dissemination activities. *Priority should be given to more proactive experience sharing forms based on the value co-creation perspective with the aim to more actively involve colleagues in working together as a learning community with a shared responsibility to create learning experiences necessary to achieve the desired outcomes. It can take the forms of professional workshops, co-creation labs or other events of qualification development.* Thus, it is recommended to switch the prevailing quantitative approach (number of conferences organised, oral presentations given inside and outside the school) to a more qualitative approach.

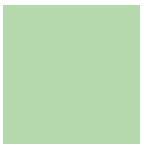
### → To municipality level politicians and administrators in education.

In the case of administrators of the municipalities where Erasmus+ KA1 projects were implemented in the consortium model, it is recommended that they monitor the impact of the project at the local level of the education system and create favourable conditions for joining experience dissemination activities.

### → To school managers and teachers.

*The aspects of the impact and sustainability of an Erasmus+ KA1 project in terms of changes in students' learning performance and school progress should be analysed and assessed in the quality self-assessment of the school.* Schools which implemented Erasmus+ KA1 mobility projects should integrate questions of monitoring project outcomes into the process of quality self-assessment, finding links between aims reached by the project and school performance indicators, and foreseeing support and development of project outcomes in their plans for improving school performance.

*In the case of school leaders, in order to ensure sustainability of project results and of managerial decisions directed at improving teachers' professional performance in class and their collegial collaboration, assessment of students' achievements is recommended.*



Home





# **Institutional impact of learning mobility, cooperation and social contexts of learning environments**



# How do mobile teachers change their schools?

## Impact of transnational staff mobility training on Polish educational institutions.

By Michał Pachocki

### Abstract

The article provides an overview of results of an impact study concerning Erasmus+ school staff mobility projects in Poland. It is also an attempt to deliver a diagnosis as to what extent the participation in mobility impacted on sending institutions and how it reflected on changes in the school environment.

### Introduction

Poland offers a relatively large amount of courses for school education staff, including those free of charge provided by specialist institutions financed with state budget funds. This is due to the systemic context of education in Poland which includes a number of institutions responsible for in-service teacher training. So far, however, there have been no systemic solutions making it possible to obtain qualifications as part of a training period in another country as no internal financial instruments have been introduced to assign funds for such activities from the national budget.

This is why Polish teachers face problems if they wish to participate in professional training abroad. Although they consider such mobility an immensely attractive and useful form of in-service teacher training, it also turns out to be far too expensive for them (and their school), especially due to the lack of domestic opportunities of funding. The Erasmus+ programme offers the most significant support in this field, providing financial assistance to the Polish school education sector, which is why it became very popular among Polish schools.

The presented article gives the results of the analysis of Erasmus+ international mobility projects for school education staff in Poland.<sup>1</sup> The

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#### KEYWORDS

ERASMUS+ MOBILITY OF STAFF, INTERNATIONAL DIMENSION OF SCHOOLS, SCHOOL COMMUNITY, SCHOOL ENVIRONMENT

<sup>1</sup> This article is based on a study first reported in the Polish national report on results of the longitudinal analysis of mobility projects for school education staff ("Impact and Sustainability of the Erasmus+ Programme Key Action 1 Mobility Projects for School Education Staff" (2016). Warsaw: Foundation for the Development of the Education System – Polish Erasmus+ National Agency). A shortened version of the report was published in *Mobile teachers change their schools. Impact study of Erasmus+ mobility projects for school education staff. Polish national report* (2016). Warsaw: Foundation for the Development of the Education System – Polish Erasmus+ National Agency.

eligible applicants of this programme action are institutions providing general, vocational, or technical education on any level from pre-school to upper secondary education. The study aimed at measuring the impact of projects and the core objective of the research activities was to analyse such impact not only on its participants but also on increasing the potential of institutions implementing transnational mobility.

## Research context

According to programme rules<sup>2</sup>, the mobility projects for school education staff promote transnational mobility activities targeting staff employed in educational institutions and aiming to:

- support the acquisition of competences (knowledge, skills and attitudes) for personal development and the labour market;
- support the professional development of those who work in the school education field, with a view to innovating and improving the quality of teaching;
- enhance foreign language competences;
- raise participants' awareness and understanding of other cultures and countries, offering them the opportunity to build networks of international contacts;
- increase the international dimension of organisations active in the education field so that they become more attractive providing programmes that better respond to the needs of individuals;
- reinforce synergies and transitions between formal and non-formal education, vocational training, employment and entrepreneurship;
- ensure a better recognition of competences gained through learning periods abroad.

Although the maximum duration of project is 1 or 2 years, the mobility activities in another programme country must be carried out between from 2 days to 2 months. During the implementation of a mobility project, a minimum of two partners from different Erasmus+ programme countries (one sending and at least one receiving organisation) must be involved. The applicant organisation is in charge of applying for the mobility project funding, signing and managing the grant agreement and reporting. As the sending organisation, the applicant is also in charge of selecting teachers and other school education staff to go abroad. The receiving organisation can be a course provider, partner school or another relevant organisation which is in charge of receiving participants and offering them a programme of activities or benefiting from a teaching activity provided by them. Transnational mobility is a very important experience for individuals shared by those who jointly participated in the project. Hence such mobility is perceived mainly from the perspective of individual benefits. However, it is to be noted that these benefits are shared by other people and the institutions to which the participants are linked in terms of their work.

The projects covered by the research comprised one or more of the following activities:

- teaching assignments (teaching at a partner school abroad);
- professional development courses (participation in structured courses or training events abroad);
- practical experience in education (job shadowing/observation period abroad at a partner school or in another relevant organisation active in the field of school education).

<sup>2</sup> Detailed information on eligible activities and the potential target group for the above-mentioned actions was fully described in the Erasmus+ Programme Guide Valid as of 1 January 2014, Part B – Mobility project for adult education staff, 55–59.

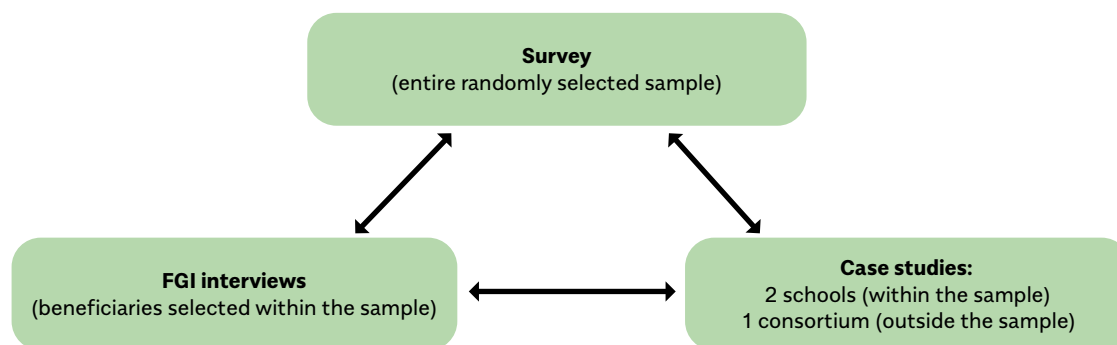
## Adopted methodology

The main objective of the longitudinal study was to analyse the impact of staff training mobilities on increasing the potential of school education institutions<sup>3</sup>. This analysis was performed within a joint international project coordinated by five National Agencies (from Lithuania, Estonia, Finland, Germany and Poland) responsible for the coordination of the Erasmus+ programme in the school education sector. The project, initiated by the Lithuanian partner, aimed at quality assessment of school education staff mobilities, evaluating project results and identifying good practices among beneficiaries at both national and transnational levels<sup>4</sup>.

As the national research was part of a transnational project, the tools provided by the Lithuanian project leader were also used by the Polish research team. In accordance with the objectives, the Lithuanian coordinators were also responsible for the development of analysis guidelines and for the standardisation of research activities in all five partner countries. The main preparatory and consultative activities (discussing the methodology as well as adopting universal terminology and a timeline of activities) were implemented before launching the national part of the research.

The analysis was performed using both quantitative and qualitative methods. The quantitative research was carried out using an online questionnaire addressed to four main groups of respondents: teaching staff participating in mobility, non-mobile staff, students (aged above 15 and taught by the teachers participating in the projects) and their parents (only the ones actively involved in school life). The National Agency received a total of 1,787 completed questionnaires (30% of which were completed by the students). The questionnaires were delivered to respondents via an online survey tool (active links to questionnaires were e-mailed to each group).

Figure 1: Ensuring data triangulation. Chart of research activities.



The qualitative research was conducted by way of focus group interviews (FGI) and analysis of case studies. The focus groups were organised for school leaders and participants of job shadowing mobilities

<sup>3</sup> The target group of all research activities were 46 schools selected in 2014 (in the first selection round of Erasmus+ Key Action 1 in the school education sector) and one consortium selected in 2015. The national research covered the following mobility projects: finalised (with final reports submitted and accepted), completed (with final reports submitted) and ongoing projects with all mobilities implemented (with participant reports submitted but final reports not yet received). In addition, one of the three case studies concerned a project implemented by a consortium of schools selected in 2015 (as such a beneficiary type was not eligible to apply in the previous round).

<sup>4</sup> The results of the transnational project were first published in *Impact and sustainability of the Erasmus+ Programme Key Action 1 Mobility Projects For School Education Staff. Research report* (2017). Vilnius: Education Exchanges Support Foundation.

and a total of 25 representatives of schools took part in this stage of the survey. The schools were selected by the National Agency on the principle of non-probability sampling (with their availability and geographical location as the main criteria) and each of the three FGI meetings was organised in a different location, which made it possible to obtain the views of school representatives from various regions of Poland.

Figure 2: Questionnaire completion rate (number of respondents by target group).

	Mobile teachers	Non-mobile teachers	Students	Parents
Number of submissions	350	412	596	429
Response rate	19.6%	23%	33.4%	24%

The case studies concerned project good practices which proved to be useful in determining the strongest points of project implementation at the institutional (or consortium) level. It also helped to indicate potential problems during project implementation and adequate solutions to obstacles faced by beneficiary schools. This analysis was based on individual and group interviews with beneficiary representatives, project leaders and mobility participants. School leaders were interviewed individually while teachers (both mobility participants and other staff) were interviewed in larger groups.

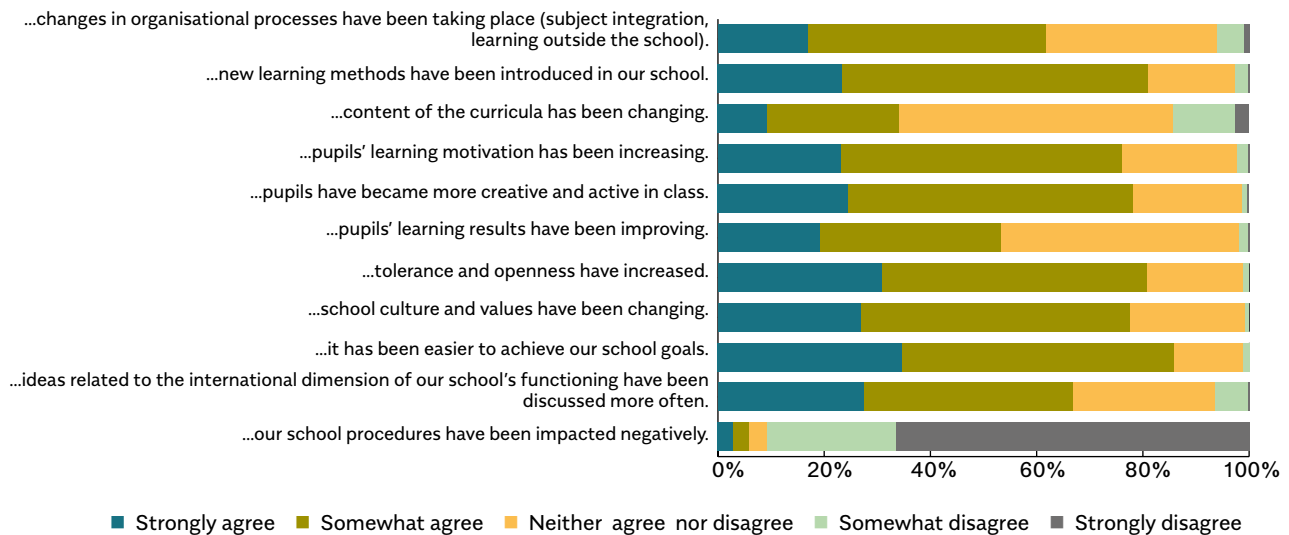
## Institutional impact

Both teacher groups (mobile and non-mobile) claimed that their mobility results should play an important role in the functioning of the school. This influence should be visible not only in the teaching (improving students' knowledge and skills) but also in the wider, social context (influence on the school culture including common attitudes and values in the school community). The survey results showed that these projects had a significant influence on sending institutions and the respondents of all target groups confirmed that mobility had contributed not only to the acquisition of new knowledge, but also to the improvement of the school's functioning.

The survey made it possible to estimate benefits of project implementation in the systemic context of sending institutions. Both survey and interview participants stressed that participation in those projects had a positive influence on both schools and teaching staff. Most mobility participants confirmed that, above all, their involvement in mobility had brought benefits to their schools. The vast majority of respondents believe that the project contributed to the introduction of new forms of teaching. More than half of mobile teachers also noticed changes in the organisation of the educational process. Over three quarters of respondents were aware of the projects' influence on school culture and the local community.

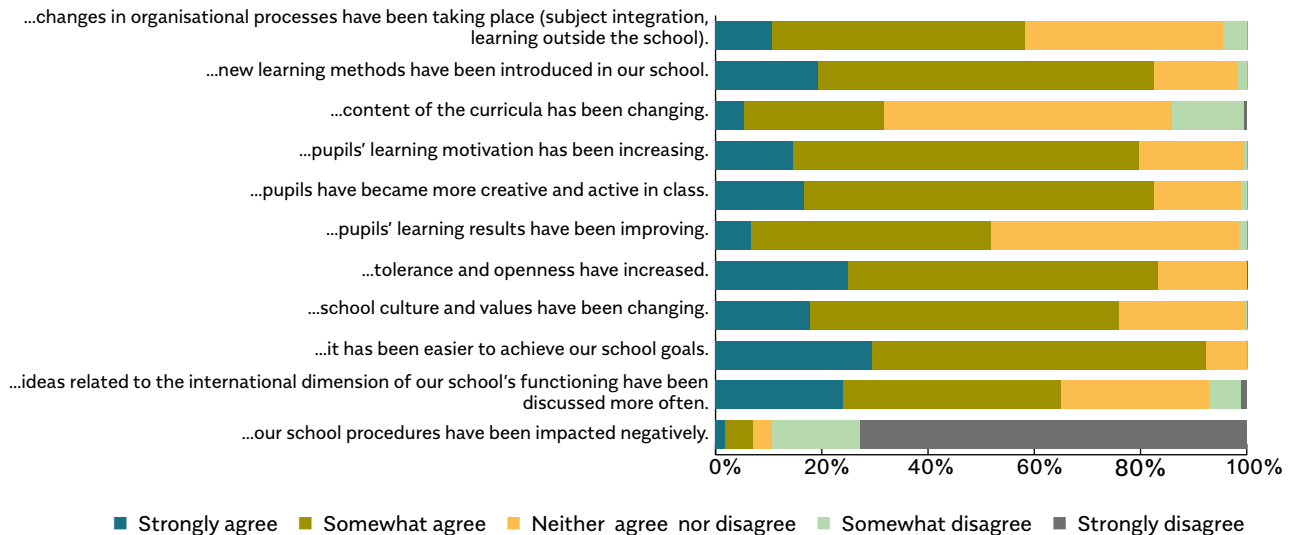
**Figure 3: Benefits for home institutions (questionnaire for mobile staff).**

Since the completion of Erasmus+ staff mobility in our school...



**Figure 4: Benefits for home institutions (questionnaire for non-mobile staff).**

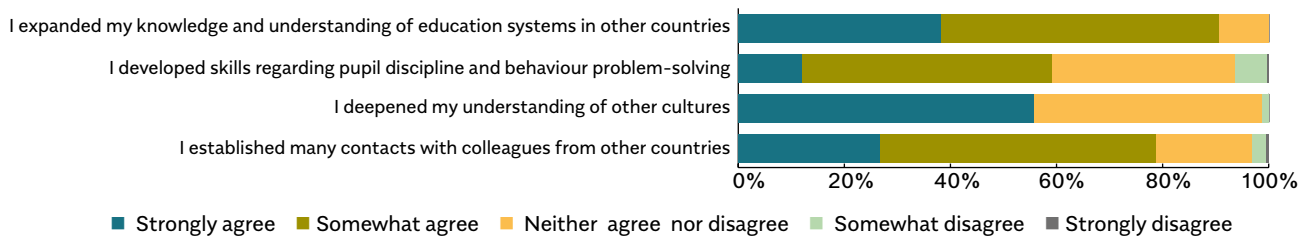
Since the completion of Erasmus+ staff mobility in our school...



Non-mobile teachers were of a similar opinion as the changes involving application of new teaching methods were noticed by over 80% of respondents in this group. A slightly lower number of respondents noticed a positive impact of projects on students' motivation. However, more than half of non-mobile teachers discovered an increase in the frequency of discussions related either to internationalisation or to activities implemented by their institution in this field. Interestingly,

respondents not participating in mobility training abroad were slightly more optimistic regarding some of the above-mentioned aspects, including key areas of mobility’s positive influence on home schools. A slightly higher number of respondents from that group noticed an improvement in students’ learning achievements and the fact that discussions concerning the internationalisation of their institution became more frequent.

**Figure 5: Becoming familiar with different education contexts of teachers (questionnaire for mobile staff).**



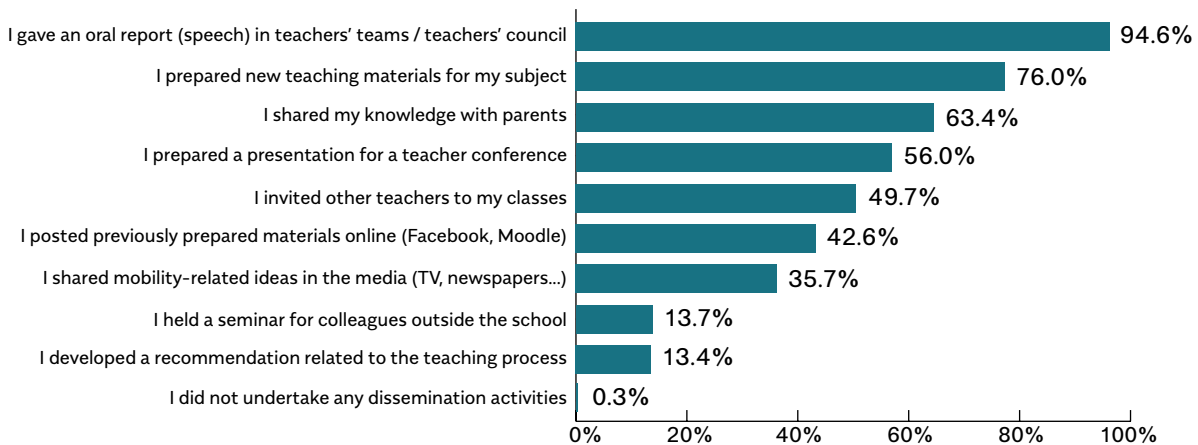
The participants of the focus group interviews often raised the importance of significant differences in the teaching profession between Poland and other European countries, e.g. considerably higher number of teaching hours and incomparably higher remuneration. They claimed that such working conditions often lead to a different perception of the teaching profession (especially in countries where teachers seem to enjoy a high respect and experience more comfort in their working environment) as well as much higher prestige in the local community.

Discipline that stems from a specific context of the school’s performance (e.g. cultural diversity of students) was an additional subject raised by many respondents as something which is uncommon in the Polish educational environment. Better discipline in class, despite comparable numbers of students, was often emphasised. As a consequence students’ strong internal motivation to learn was observed in contrast to external motivation based on marks, which is characteristic for Polish schools.

### Knowledge sharing

The survey showed that knowledge acquired as a result of mobility is a significant factor in the development of home institutions. This aspect was also considered important by the participants themselves. This was confirmed by the implementation of dissemination activities by over 95% of mobile teachers.

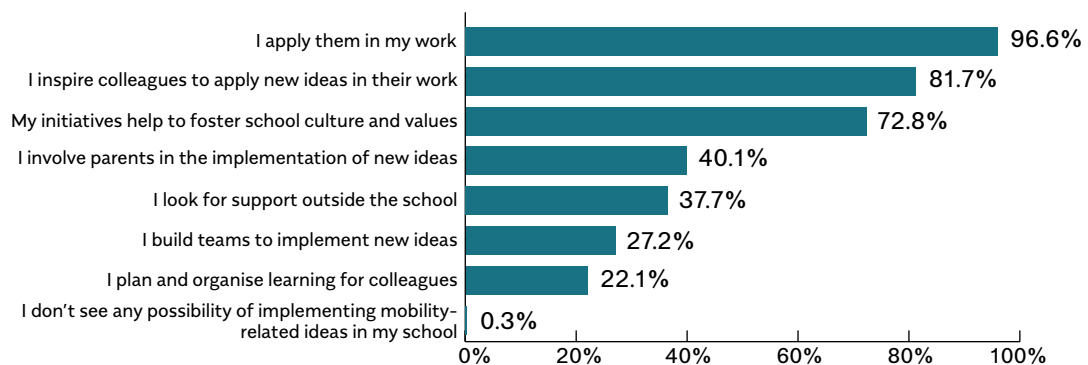
**Figure 6: Dissemination of results implemented by project participants (questionnaire for mobile staff).**



The vast majority of the respondents confirmed that they applied mobility results in their work and shared their newly acquired knowledge and experience with other teachers and staff in sending institutions. Over three quarters of respondents claimed they developed new teaching materials. A great majority of respondents tried to encourage their colleagues to generate and implement new ideas leading not only to the improvement of students' competences but also to the development of their school. Over two fifths of respondents tried to involve parents. This shows that – in the opinion of the respondents – information about newly acquired knowledge and skills is disseminated mainly among the teaching staff of the schools involved in projects.

The responses on knowledge transfer at local, regional and sectoral levels were slightly different. Although more than half of the respondents confirmed that they prepared a presentation for a conference, a definitely smaller proportion confirmed direct interaction with those potentially interested in results obtained during project implementation (seminars for other participants, recommendations).

**Figure 7: Dissemination of project results (questionnaire for mobile staff).**



During focus group interviews it could be heard that the rule was to share knowledge acquired abroad with other teaching staff members. It was also confirmed that knowledge sharing often goes beyond the school.



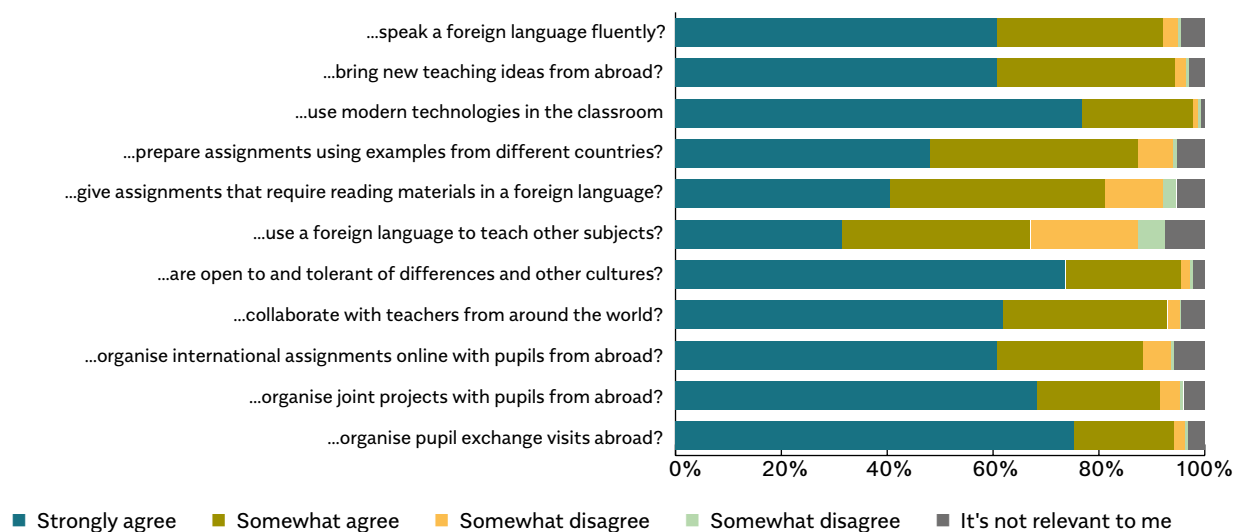
School heads claimed that project participants also organised trainings for teachers in other institutions and developed articles in which they shared experience and newly acquired knowledge and skills. This is undoubtedly linked with the necessity of ensuring quality of the dissemination of mobility results, which had to be planned by beneficiaries at the application stage.

### Impact on the school community

Joint participation in a project usually had a significant influence on the integration of teaching staff. It was often stressed that such influence extended to persons not participating in projects directly (non-mobile teachers). Active participation and commitment were a wonderful occasion to learn effective cooperation. This is a meaningful result especially in the context of the functioning of Polish schools which, due to demographic decline, are merged to form larger entities. During one interview participants talked about large schools composed of several smaller institutions where initially teachers were engaged in conflicts, later resolved thanks to participation in a project, joint activities and opportunities to get to know each other. Participating in mobility projects also strengthened their participants' identification with the home institution. Sometimes job shadowing allowed them to see their workplace in a positive light. Some group interview participants emphasised that foreign partners valued the quality of work at Polish schools.

It seems that participation in mobility activities significantly influenced the functioning of schools, teachers, students and sometimes even parents, as well as institutions in the school environment. This was also confirmed by students' responses. Almost all respondents from this group confirmed the importance of applying new technologies by teachers (over 97%) and introducing new teaching ideas from abroad (over 94%). It is worth noting, however, that a much lower number of students (over 67%, which is still a very high percentage of respondents) considers the use of foreign languages in teaching other subjects important.

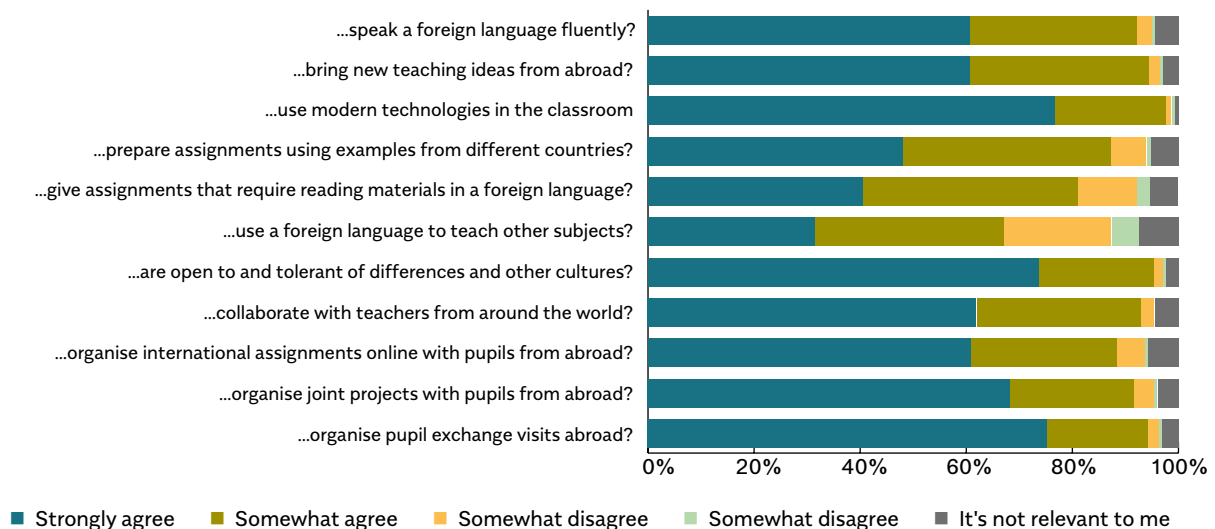
**Figure 8: Benefits of school education staff mobility (questionnaire for students).**  
**To what extent is it important that your school teachers...**



The students often expressed their views on increasing the level of internationalisation in Polish schools. Responses linked to the willingness to participate in projects involving students from other countries and international student exchange programmes were also significantly frequent (over 90% of respondents). It seems that cooperation between teachers from different countries is important to this group of respondents (over 90% of responses). A change in attitudes also seems extremely significant. Over 95% of students claimed that tolerance and teachers' openness to cultural differences was important to them. It can also be concluded that, generally speaking, students see mobility results in a positive light. Over 90% of students claimed that teachers shared their observations upon their return and talked about their training period abroad.

**Figure 9: Results of school education staff mobility (questionnaire for students).**

**What is the behaviour of your teachers after they return from their training activities abroad?**

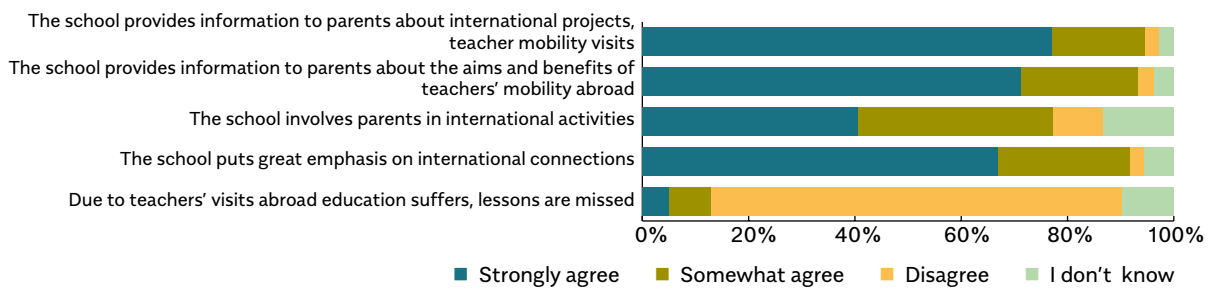


The students pointed out the internationalisation of their school as the weakest aspect among the mobility outcomes. Only over 60% of them declared that teachers organised learning online with the participation of students from abroad. This is particularly interesting as this area seems to be the most important for students, taking into account potential projects benefits. Such an opinion may stem from the fact that the vast majority of students participating in the survey had never taken part in international educational mobility (such as pupil exchange programmes). Almost three quarters of respondents declared no experience in transnational pupil exchange projects. Such an outcome corresponds with data coming from the questionnaire for mobile teachers. Generally speaking, none of these groups had been involved in transnational mobility before and, taking into consideration the results of qualitative research, the project implementation was often an opportunity not only to carry out the first ever training abroad but also to leave the country for the first time. It is worth adding that this lack of previous mobility experience also results from a high degree of competition at the stage of calls for proposals and a relatively low success rate while applying for grants (due to financial constraints, the National Agency provided funding only to a fourth of all submitted applications in the first selection round).

What is noteworthy, students' views on the essence of internationalisation of their schools are echoed in their parents' opinions. Nearly all of them (over 99% of respondents) claimed that acquisition of competences related to international cooperation was important for their children. There was also a link between mobility, development of home schools (96%) and, above all, improving students' learning achievements (over 95%) noticed by most respondents. The parents who participated in the survey were mainly of the opinion that school benefits gained during mobility had outweighed potential losses. However, it has to be stressed that this cohort relatively frequently pointed to the risk of neglecting the school's educational function due to the projects (over 12% of respondents raised the issue that as a result of staff mobility students do not have certain lessons). Information on the objectives and outcomes of projects passed to parents is seen as a positive thing. They noticed the importance that schools attach to internationalisation. They also confirmed that schools themselves engaged them in such activities.

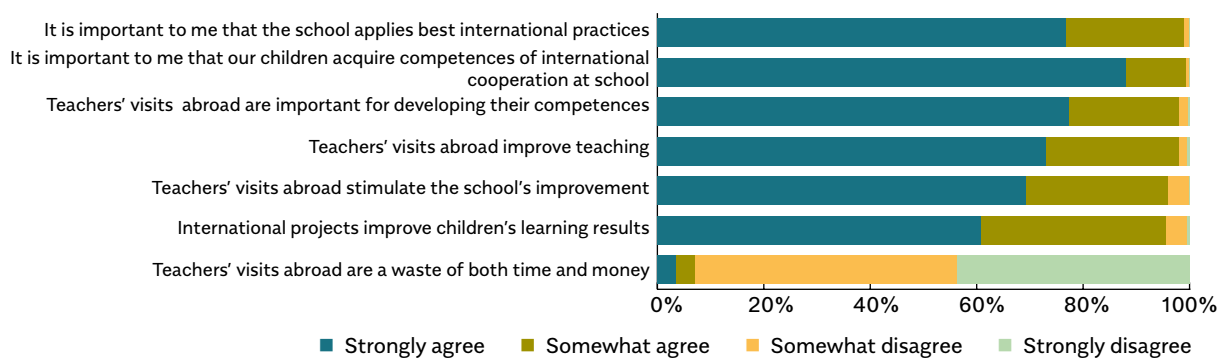
**Figure 10: Mobility benefits for home institutions (questionnaire for parents).**

**What is your opinion about the international activities at your child's school?**



**Figure 11: Mobility benefits for the home institution's environment (questionnaire for parents).**

**What is your opinion about the benefits of the internationalisation of your school?**



### Increased competitiveness of schools

Almost the entire group of respondents agreed that one of the most important reasons (and the most significant benefits) of submitting grant applications was a willingness to increase the school's prestige in the local community. Higher competitiveness of the school as compared to the local educational offer seems to be one of the most frequent reasons for deciding to become involved in a mobility project. This



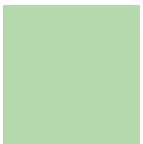
is mainly due to the strong competitiveness of schools on the local education market and necessity to fight for students in the situation of demographic decline. The perspective of lack of interest in a school displayed by a sufficient number of candidates not only means not making full use of the teaching staff's competences but may also lead to closing down of the school. The implementation of EU projects was considered one of the ways in which such risks could be avoided.

The increased competitiveness of schools was important especially to those respondents who work in schools situated in bigger urban centres. In smaller localities participation in projects was often described as a way to survive. This mainly applied to schools in villages situated near big agglomerations as they are exposed to the risk of losing students to competitive urban schools. In such a situation the projects turned out to be a real chance for ensuring a school's attractiveness and for surviving in the local community.

## Conclusions

The results of the study proved that staff training abroad not only supports teachers in developing their competences but also significantly improves the functioning of schools and their environment. Most of the respondents try to use their newly acquired experiences both to their individual benefit and to support the development of their school. Also, changes occurring after the completion of mobility projects affect not just project participants. Other members of the teaching staff are often interested in participants' experience and keen on using new teaching materials.

What is more, the possibility to experience other systemic contexts and solutions in many cases prompted participants to reflect on the conditions of Polish schools and of the teaching profession. Such reflections often contributed to changes in schools and many of these changes stemmed directly from changing attitudes not only of teachers but also of students and their parents. However, it is the teachers themselves who play a crucial role in this process as it is their optimism and commitment that determines changes based on solutions imported from abroad. To verify whether this positive attitude will contribute to sharing of experience and new knowledge from abroad the time aspect needs to be taken into consideration. This stems from the importance of the longitudinal approach towards project impact, as time is a key factor in the sustainability of results of the mobility intervention.



Home

# Measuring Impact: the role of the Impact+ Exercise in changing professional and organisational practice

By **Kevin Robinson and Steven Murray**

The Impact+ exercise has been developed by the UK National Agency for Erasmus+. The purpose is to support applicants and projects funded through the Erasmus+ programme to achieve maximum impact for their project and thereby the programme more widely. The Impact+ exercise is part of an on-going Transnational Cooperation Activity (TCA) and has been evaluated alongside its continued evolution.

## Introduction

Early in the Erasmus+ programme, the UK National Agency (NA) identified weaknesses in the applications they were receiving. Among Adult Education and VET applications between a quarter and a fifth of applications were failing the minimum assessment criteria (20–25%). As a result, they were ineligible for funding. The UK NA found that in many of these cases, a poor assessment score for “Impact & Dissemination” was often a contributing factor.

This was perceived as a problem because (i) it left us with a smaller pool of applications to select from and (ii) it made it more difficult to allocate all the programme funding. This second point would become especially important with the increase in funding scheduled in the 2017 Call. The NA felt that some preventative action was required.

Discussions with other NAs indicated that this was a common problem and a common concern. We found that none of the Erasmus+ NAs consulted offered specific, detailed pre-application or post-selection support for impact assessment. A rapid review of materials available showed that while there were lots of materials, these were generally for those with some previous experience of impact or evaluation or they focused on specific techniques or data collection methods (e.g. survey questionnaires). Therefore, we felt that there was a need for some specific entry-level impact materials.

The solution of the UK NA was to design the Impact+ Exercise to help applicants and beneficiaries explore their project impact. What is the exercise? It's a guided workshop exercise designed to help project partners

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currently works as Team Leader – Stakeholder Engagement for the UK Erasmus+ National Agency, which is a partnership between Ecorys UK and the British Council. For over 20 years he has worked in the field of education and training, with a particular focus on European initiatives and funding programmes that aim to improve the quality of provision through transnational cooperation. He has been with Ecorys UK for 10 years and is an Associate Director within

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### KEYWORDS

ERASMUS+, IMPACT+, QUALITY



the Programme Management and Communications Division. He works closely with a range of stakeholders as well as counterparts from other countries to ensure the effective implementation of Erasmus+, including overseeing key areas of activity for the UK NA, which include Transnational Cooperation Activities (TCA) and impact assessment.

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**STEVEN MURRAY** is a Senior Consultant in the United Kingdom Erasmus+ National Agency (NA) based at Ecorys UK. He is involved in qualitative and quantitative research and evaluation that aims to understand the impact of the Erasmus+ programme in the UK. His research interests include education, culture, social statistics and survey methods.

or staff work through the stages of identifying their impact, working out how to measure it and then how to capture the data. It intends to start the process off showing where the focus for further work should be, rather than to take the user on a complete impact assessment journey from start to finish. Before official launch, we tested the Exercise with an international group of beneficiaries.

## The Impact+ Exercise

The Exercise is designed to be:

- a. Flexible: you can do it as a group, alone or with participants;
- b. Generic: it's not Erasmus+ specific – you can adapt it for other projects or activities;
- c. Low-tech: you don't need any expensive equipment to do it;
- d. Simple: impact assessment is really a very straightforward process – designing indicators and data collection strategies can get complicated but in essence, it's a simple concept.

Within the NA, we've tried to integrate the Exercise into our work. We promote it as one source of help, not the only source. There are other materials available, like Logic Model and Theory of Change guidance, and these will be more suitable for some people.

There are several specific activities we've done:

- Presented the Exercise in leaflets at our Erasmus+ Information Days (pre-application);
- Included it in our guidance for applicants (pre-application) and guidance for projects (post-selection);
- Included it on the agenda at our Start-Up Seminars (post-selection);
- Included workshop sessions at our events, e.g. Annual Conference, Learning Networks (pre-application & post-selection);
- Included it in our communications activities – social media, blogs (pre-application & post-selection).

We've promoted the translation of the materials into other languages and have supported other NAs where we can. The Impact+ Tool is available in 8 languages with 2 more expected. The video guide is subtitled in English, French and German. This helps partners of UK-led applications and projects as well as other NAs. We've trained almost 20 NAs to use the Exercise and we know that at least 7 NAs have already run their own Impact+ Exercise workshops with beneficiaries.

## Measuring success

How are the UK NA assessing the impact of Impact+ Exercise? We're using the Impact+ Exercise itself. We've been applying it to our Transnational Cooperation Activities (TCA) work and it has proved useful there too.

- Impact: improved quality of Erasmus+ applications and projects.
- Indicators:
  - Year on year change in Impact & Dissemination score at application assessment stage;
  - Year on year change in no. / % of applicants passing the minimum Impact & Dissemination criteria at application assessment stage;
  - Quality assessment rating of interim / final project reports;
  - Quality of project impact assessment activity / materials;
  - No. of good practice case studies for impact;
  - Changes in organisational and staff approaches to impact assessment.
- Data sources:
  - EPlusLink (assessment scores);
  - Interim & final project reports;
  - Project evaluation / impact reports;
  - Training event feedback (where Impact+ Exercise is used);
  - Qualitative research with training participants.

## Preliminary results

Is it working? For many of the indicators it is too early to say. There are a limited number of projects that have finished and provided their final reports and evaluation reports to the NA. But there are some indicators that are still to be reported on. Specifically the changes in application quality.

So far the UK NA have looked at the difference in KA2 VET and Adult Education projects between 2016 and 2017. The Impact+ Exercise has only been promoted to the 2017 Call applicants. At the moment, this shows *no difference in the quality of applications or in the proportion passing the minimum quality criteria.*

Indicator	Field	2016	2017
Average "impact" score (out of 30)	VET	17.4	17.5
	AE	18.3	18.0
% passing minimum "impact" criteria	VET	84%	83%
	AE	85%	81%

However, the qualitative research with beneficiaries who attended the pre-launch test event shows that there are some benefits and improvements from using the Exercise.

- The majority of respondents felt that the workshop had been helpful or very helpful in assisting them in considering the impact of their project;



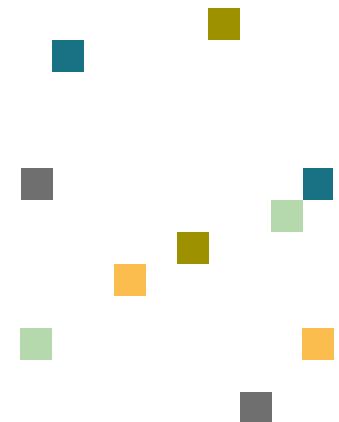
- A third of respondents had already used the materials in their current Erasmus+ project either at the start or during implementation;
- Almost all respondents would recommend the materials to colleagues or partners and many already had done so; and
- Some respondents reported observable positive changes in their personal and organisational understanding of and approach to impact assessment.

*"I used the Impact+ methodology for writing the project to clarify for myself and the group I'm working with, the staff. We used this tool to clarify what was our position towards public local policies and partners as well to potential partners that we didn't consider at the beginning; and also what we would like to develop in terms of internal competencies, what we are lacking now and what we would like to develop internally." – Impact+ Exercise workshop participant.*

## Conclusions

The UK NA believe that it is too early to say whether the Impact+ Exercise is having the desired impact or not. It is expected that it will be possible to say something more conclusive after the 2018 Call applications have been assessed. In the meantime there are some actions for the UK NA to try and maximise impact:

- Expand our analysis of assessment scores to all Key Actions and programme fields. We will also continue a text analysis of the impact and evaluation activities proposed in applications;
- Continue to embed the Impact+ Exercise in NA support materials and practice. Evidence from the 2017 KA2 Start-Up seminar shows that few projects were aware of the materials;
- Continue organising beneficiary training events and research to understand the impact.



# Impact-minded European Cooperation: Analysing the diversity of education and training partnerships

By **Alix de Saint-Albin**

## Abstract

This paper addresses the methodological challenge of analysing the potential impacts of Erasmus+ partnerships. It describes a toolset used to characterise projects in several dimensions: innovation, public population and partner complementarity. Ultimately, this method acknowledges project diversity and allows for a better valuation of “atypical projects”, thus encouraging project innovation.

The initial study can be found on the French Erasmus+ Impact Observatory website at <http://www.agence-erasmus.fr/article/198/les-notes-de-observatoire-n6> (English and French synthesis available).

## Introduction

Launched in 2014 under the new Erasmus+ EU programme for education, training, youth and sport, partnerships are one of the major actions for encouraging innovation and the exchange of practice. The Erasmus+ multilateral partnerships are more flexible and open, and involve multiple stakeholders, offering real collaboration opportunities for innovating, sharing and bringing the world of education, economic partners and local authorities closer together at a transnational level.

With €130 million allocated to France for the 2014–2017 period and a budget averaging between €250,000 and €300,000 per project, the Erasmus+ partnerships have until now remained little documented, unlike learning mobility.

Therefore, to provide qualitative input for the midterm evaluation of the Erasmus+ programme in 2017, the Erasmus+ France / Education & Training Agency had a thorough analysis carried out of the initial impacts of the partnerships financed in 2014 and 2015.

The study was conducted between October 2016 and February 2017 by Pluricité (a consultancy firm specialising in policies and programme evaluation) and Synoptic (a company dedicated to quantitative studies for public decision makers).

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He contributed to about one hundred evaluations in various fields, including international exchanges, higher education systems and vocational training.

He developed a strong interest in methods, both qualitative and quantitative.

He is engaged in research

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## KEYWORDS

ERASMUS+ PARTNERSHIPS,  
EVALUATION METHODOLOGY,  
PARTNERSHIP ADDED VALUE,  
TYPOLOGY, TAXONOMY,  
COMPLEMENTARITY

and public debate on policy change. He has a record of many communications in events related to evaluation and policy change, and runs a personal, freely available information website screening everything related to public policy evaluation in France (la “vigie de l'évaluation”, over 500 articles). Topic-wise, his preferred areas of expertise encompass the continuum from basic education to employability and social inclusion, with a stronger accent on local development, higher education and vocational training.

**The study focused on the added value of transnational cooperation** as well as on the forms of innovation developed, created or transferred within these projects. Special attention was paid to key national and European issues, such as combating early school-leaving and illiteracy, the acquisition of key competencies, modernising education and closer ties with the job market.

This paper presents the methodological challenges encountered and how they were dealt with. The study's results provide transposable analytical tools, such as a typology of the proven added values of cooperation projects, and a set of five “best in class” factors across each type of project. Those assessment tools will helpfully contribute to a better assessment of partnership projects at an early stage.

## Study Framework

The Erasmus+ France / Education & Training Agency promotes, manages and valorises the “Education and Training” strand of the Erasmus+ programme (2014–2020). As such, the Agency conducts various analyses of the impacts of learning mobility and European cooperation projects. This work is linked to the creation in 2016 of an Observatory on the impact of Erasmus+, aimed at federating a community of interest to produce and disseminate knowledge on the impact of Erasmus+.

The Agency wanted to launch an initial evaluation process for the Erasmus+ Key Action 2 partnerships in order to contribute to the mid-term evaluation of Erasmus+ through an analysis of the first years of the projects' implementation.

## Scope of the study

The study embraces only “education and training” partnerships coordinated in France and managed by the Erasmus+ France / Education & Training Agency. It includes partnerships with signed agreements in 2014 and 2015.

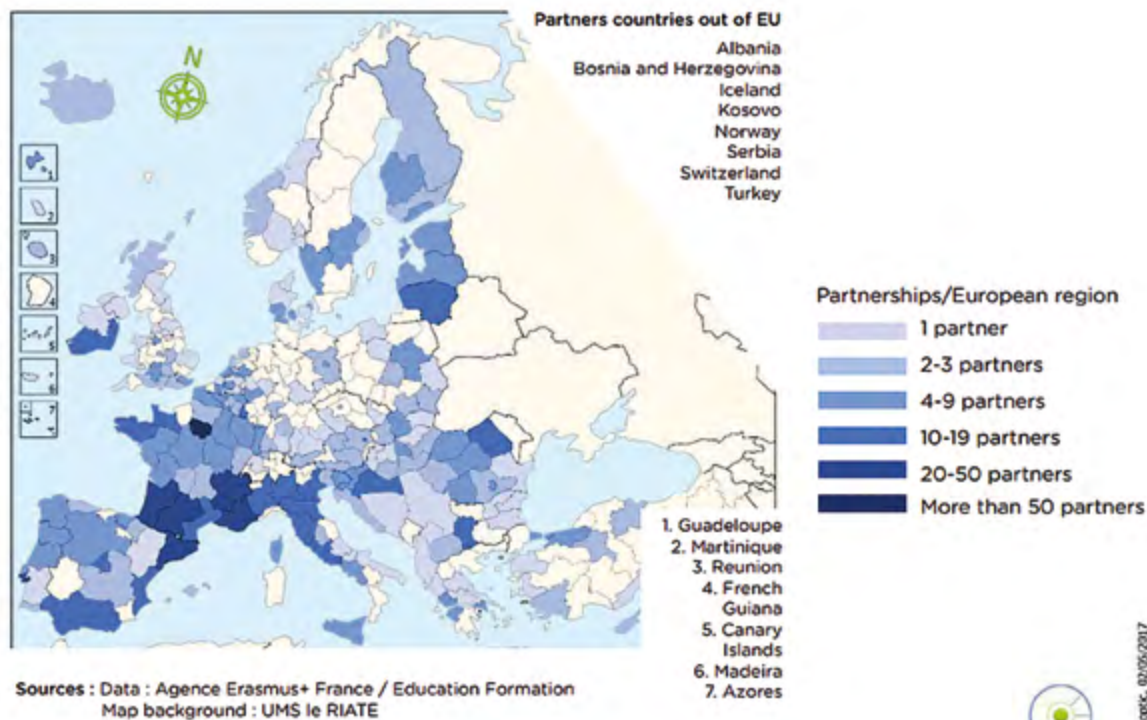
The study does not involve partnerships between schools only or school partnerships between local authorities, whose objectives and characteristics differ from the partnerships studied.

## Overview of Partnership Projects

### Hundreds of projects across Europe

There are three strands in the Erasmus+ programme (2014–2020): Education / Training, Youth and Sport. It has three key actions: Mobility, Cooperation and Support for Policy Reform. The partnerships come under Key Action 2 “Cooperation” for supporting innovation and best practices. This type of project involves at least three European structures with a variety of statuses, including higher education institutions, associations, companies, government bodies, research institutes, foundations, training centres and careers centres. These structuring projects for regions and sectors last between two and three years and must lead to the design, transfer and/or implementation of innovative practice at an organisational, local, regional, national or European level in the field of education and training. The partnerships also aim to implement joint initiatives promoting cooperation, peer learning and exchanges of experience at a European level. **The European Union wishes to bring together a wide variety of stakeholders**, companies in particular, around common projects through partnerships. The aim is to encourage innovation and address the economic and social challenges confronting European countries more effectively.

In France, in 2014 and 2015, **138 partnership projects**, falling within the above-detailed research scope, were supported by the French Erasmus+ Agency. They involved no less than 1,045 partners, 200 regions and 43 countries.



This map highlights the diversity of partners of the projects coordinated by French organisations. They are spread across Europe but do not really exhibit any regional concentration. The regions of Spain, Benelux, Ireland and Northern Italy provide a bigger contingent of project partners. Germany, France's largest economic partner, has proportionally fewer project partners, unlike the Baltic and Scandinavian countries, which are well represented despite having much lower populations.

## Embracing diversity

Partnership projects cover a wide range of issues and consequently the projects supported can tackle a large number of topics, including:

- Education and training;
- Employment and the entrepreneurial spirit;
- Health and well-being;
- Participation;
- Voluntary activities;
- Social inclusion;
- Young people in the world;
- Creativity and culture.

The main objective of partnership projects is to foster among the partners the development of innovative practice and provide an opportunity for the exchange of best practices in relation to the quality of teaching and training, institutional modernisation and social innovation. The actions must, therefore, lead to the design, transfer and/or implementation of innovative practice at an organisational, local, regional, national or European level and have a positive impact on the people associated with the actions undertaken. Partnership projects which fall within the field studied have an average budget between €250,000 and €300,000 since, as a matter of principle, the European subsidy is not meant to cover the full costs of the project.

## The methodological issue

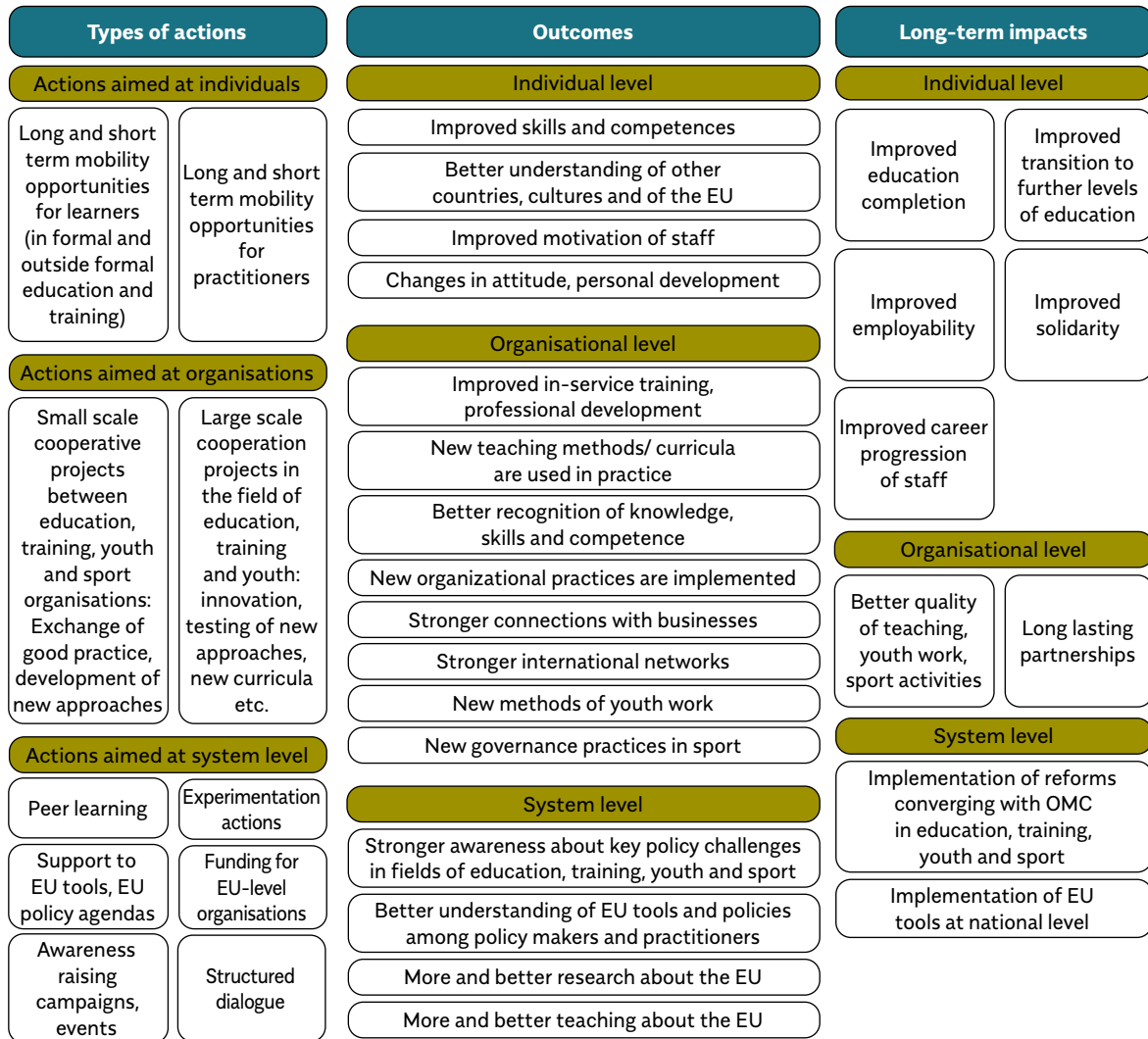
### **How to evaluate hundreds of projects which are so different in their form, scope and aims?**

Partnership projects are characterised by their wide diversity, which is reflected in different forms, such as the profiles of project coordinator and those of their partners, the number of partnerships, the targeted areas of activity, the types of innovations developed, the targeted public populations or the degree of proximity to the business world.

One option would have been to assess each project against the Erasmus+ overall objectives and target indicators (cf. image below). However, this approach is very time-consuming and more suited to assess terminated projects (ex-post evaluation).



Figure 1: Erasmus+ impacts map.



Source: Keynote presentation "Objectives, opportunities and limitations: the experience of the midterm evaluation of Erasmus+" – Sebastien Combeaud, European Commission, DG Education and Culture, Evidence-based Policy in Erasmus+, Warsaw 25–27 October 2017.

A second option consisted in a quotation of projects, based on an ad-hoc assessment grid. The grid combined three major dimensions: the purposes of the project (contributions to one or several objectives, each objective being weighted), the level of ambition for each objective and the implementation quality. While rather effective, this approach tends to favour a class of similar projects, best suited to face the assessment matrix. More fundamentally, it distinguishes projects using pre-existent criteria, leaving no or little room to "be surprised" by what projects may offer, and giving little chance for the most innovative to stand out.

Endorsing its exploratory approach, the study recused any kind of "one size fits all" criteria, while still needing a tool common to all projects.

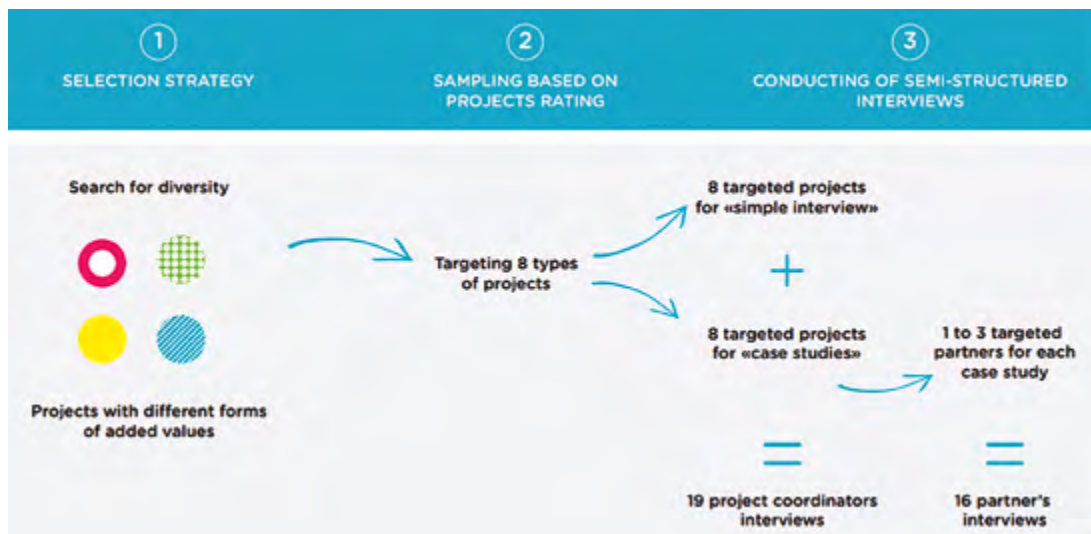
## Data-collection methodological set up

The study adopted a “screening & scoping” design.

The “screening” part consisted in a quantitative overview through an exhaustive online survey conducted by our parent Synoptic.pro. All coordinators of projects falling within the above-mentioned research scope were asked to answer an online survey in the autumn of 2016. A response rate of 87% was recorded, reflected by 115 projects out of 138.

The “scoping” part consisted in a qualitative “digging” through project case studies. The projects retained for detailed qualitative evaluation were selected in relation to their diversity, based on a rating of project leader characteristics and online survey answers. 16 projects were selected, leading to a series of 35 semi-structured interviews with French coordinating organisations and European partner organisations.

Figure 2: Qualitative enhancement strategy.



Source: Pluricité. Infographic: Erasmus+ France / Education & Training Agency.

## Analytical strategy

The data-collection provided a general overview of most projects and a detailed overview of about 10% of them. Our purpose was to design a tool providing different sets of evaluation criteria, based on a typology, to give each project a relevant evaluation grid and pinpoint the best in class in each category. We proceeded in three steps consisting in:

1. Defining several types of partners' complementarity, innovation types and other characteristics<sup>1</sup>;
2. Assessing partnership impacts in relation to their characteristics;
3. Building a custom typology of expected value added projects.

<sup>1</sup> Namely: Targeted groups, Economic inclusion, Links with businesses, Dissemination actions, Partnership configurations, Leader experience and organisation.

## Defining European complementarity

Projects deployed within the programme scope were implemented as close as possible according to territorial needs but on a transnational scale. They were supported by stakeholders with widely varying characteristics and aspirations, but nevertheless committed to a similar approach in relation to transnational openness.

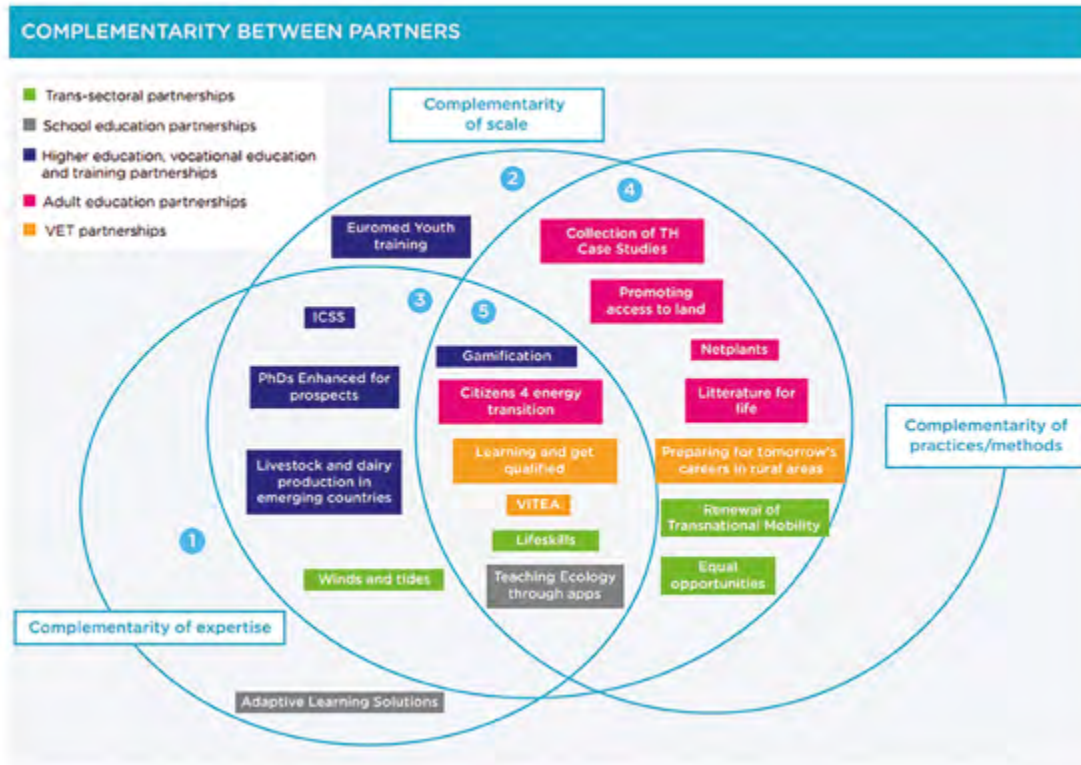
## Partner complementarity

The study highlights the fact that partnership projects have enabled organisations to build or strengthen common work habits facilitated by the structural and financial framework offered by the programme. Despite their differences in terms of status, size, etc. and the distance separating them, project stakeholders developed their projects, based on shared challenges, on the strength of different forms of complementarity:

- Complementarity of practice/methods – partnership projects favouring comparison of practices/methods and mutual learning. This form of complementarity enables partners to co-develop tools embodying the best observed methods/practices.
- Complementarity of expertise. The transsectoral dimension of partnership projects favours the association of stakeholders with very distinct areas of expertise. This plurality allows partners to perform actions or create tools requiring various skills and specialities and hence to generate innovations that could not have been developed without the input of additional expertise.
- Complementarity of scale. This form of complementarity is based on diversity of geographical locations, levels of outreach and internal resources (dedicated tools, infrastructures, etc.) specific to each partner. This complementarity appears to be a lever for the deployment of large-scale projects.



Figure 3: Distribution of project partnership studies according to complementarity.



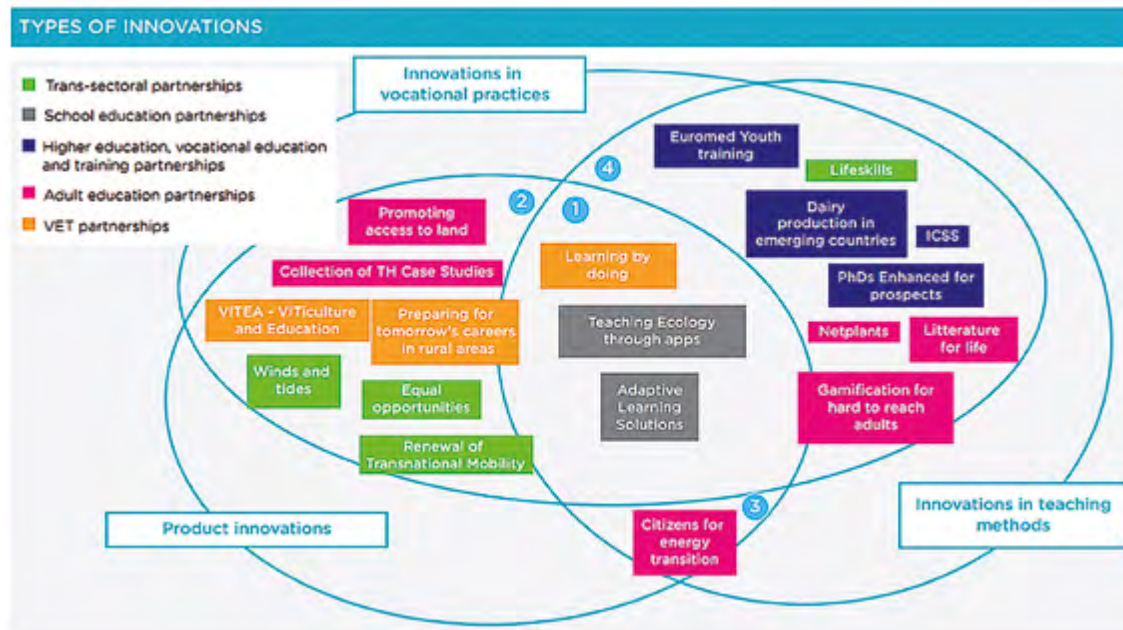
Source: Pluricité. Infographic: Erasmus+ France / Education & Training Agency.

By offering a framework that enables project partners to share their respective expertise in the service of a common project, partnership projects contribute to bringing together those involved in teaching, training and the world of business or research. Partnership projects promote openness between activity sectors and vocational cultures paving the way for innovation and development of new areas of complementarity.

### Innovation complementarity

Innovation is at the heart of the deployed projects. Innovations upheld within a partnership project framework are almost all characterised by combinations of several forms of innovation, including teaching methods, vocational practices and products.

Figure 4: Categorisation of case study projects according to types of innovations developed.



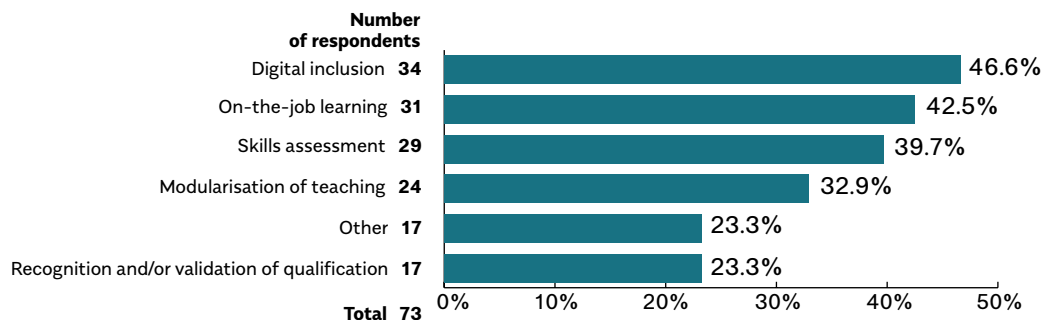
Source: Pluricité. Infographic: Erasmus+ France / Education & Training Agency.

Partnership projects present at least one form of innovation from the three identified (methods, practices and products). Nearly all the projects combine several forms.

## Teaching method innovations

Teaching method innovations cover a wide range of aspects. They favour the search for methodological diversification (differentiated teaching, learning by action, by games or by other activities). They usually complement the “conventional” methods implemented by teaching professionals. According to the survey of project coordinators, 66% of projects have produced innovations focused on teaching methods. Digital technology appears to be the means for innovation in nearly half of the innovative projects regarding teaching.

Figure 5: Main teaching method innovations.



Source: Project coordinator survey, Pluricit . 73 respondents, 152 replies (several answers possible).

## Product innovations

Product innovations mainly take the form of training media based on original teaching content. While most media are developed in a fairly conventional format (presentations, online lessons, master classes, etc.), others are also based on digital applications.

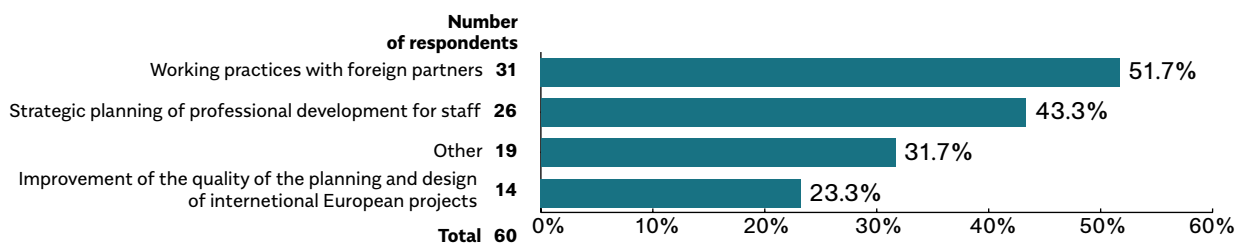
### An example of product innovation: the “Adaptive Learning Solutions” project

This project is aimed at developing a digital educational tool for children with learning difficulties based on the “adaptive learning” approach. The idea for the project emerged from the following observation: conventional educational materials and academic pace are unsuitable for children encountering learning difficulties. Moreover, teachers do not always know enough about learning difficulties to be able to support and help these children. The developed tool must enable a child’s difficulties to be detected (based on response time, mistakes made, etc.) and must automatically adapt the teaching interface and content to remove the encountered difficulties. Development of this tool, therefore, requires skills in understanding learning pathologies, digital tool design and artificial intelligence.

## Vocational practice innovation

Given the diversity of professionals involved in project partnerships, vocational practice innovations are also highly varied. These innovations are often associated with external links created with new partners, but can also involve new internal organisations and new approaches to accompanying certain public populations.

Figure 6: Main vocational practices in projects.



Source: Project coordinator survey, 60 respondents, 90 replies (several answers possible).

## A majority of projects focusing on creating rather than transferring or developing innovation

The results of the survey reveal that 58% of projects focus on generating innovations and 20% on deploying these innovations through transfer. While all of the project coordinators claim one or more forms of innovation implemented by their project, two types of projects stand out – those that deploy an actual experimentation phase under real conditions and those in which innovation mainly takes the form of intellectual productions not confronted by professionals in the field and public populations. Coordinators of projects that involve running experiments have the advantage of being able to observe the outcomes of developed innovations under real conditions. If necessary, their partners can then correct certain pitfalls to arrive at a product or an operational method whose results have been proven.

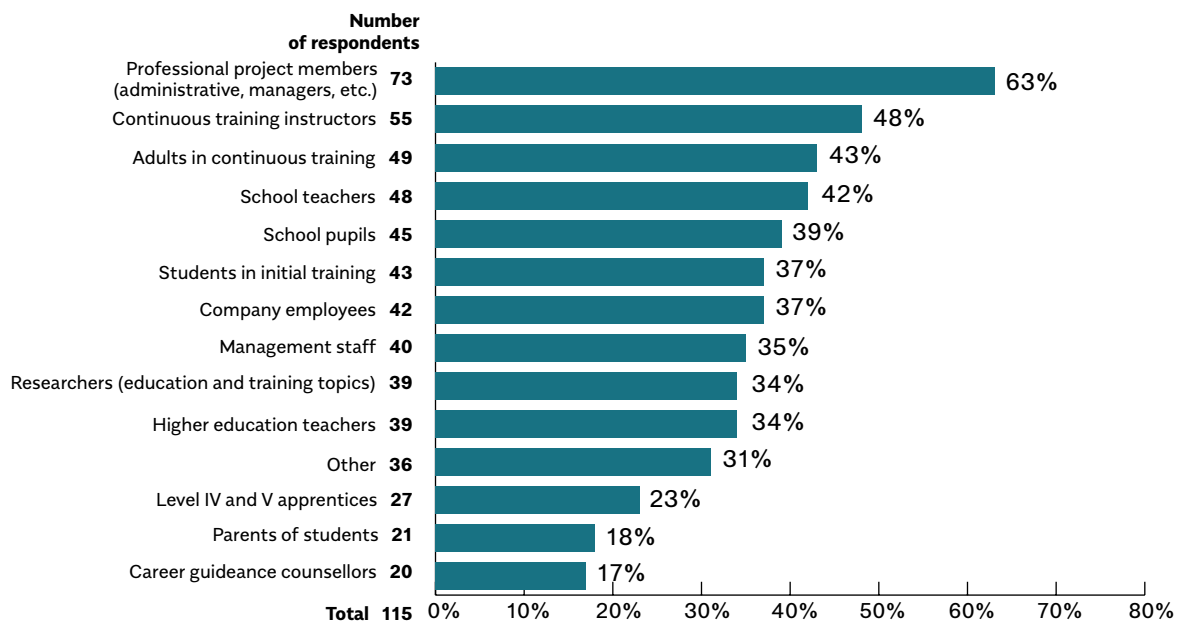
## Impacts of partnerships

### Impact on different public populations

Partnership projects affect a wide cross-section of public groups. Beyond project managers, the main public populations affected thereby are:

- teachers and trainers (47% in continuing training, 43% in school education and 35% in higher education); and
- learners (43% adults in continuing training, 40% pupils and 38% students).

Figure 7: Target populations affected by the projects.



Source: Project coordinator survey. 115 respondents, 557 replies (several answer possible).

68% of projects are intended for specific public groups, especially people far away from training and/or employment. In the context of the qualitative analysis, prioritised public populations affected by the different projects studied are:

- adults in precarious situations with low levels of qualification;
- young people at risk of dropping out of school;
- adults and children learners with disabilities;
- children with learning difficulties.

Among the projects studied that have led to tools or methods being put into practice with public populations, the project coordinators mention the positive effects observed on the self-confidence and autonomy of pupils and adults that can have a profound impact on their career. The opportunity these people have to become involved in projects over the long term and to be called upon to participate in transnational events is a factor for significant progress, which can re-energise them towards finding a job or towards a specific career.

### Impact on organisations

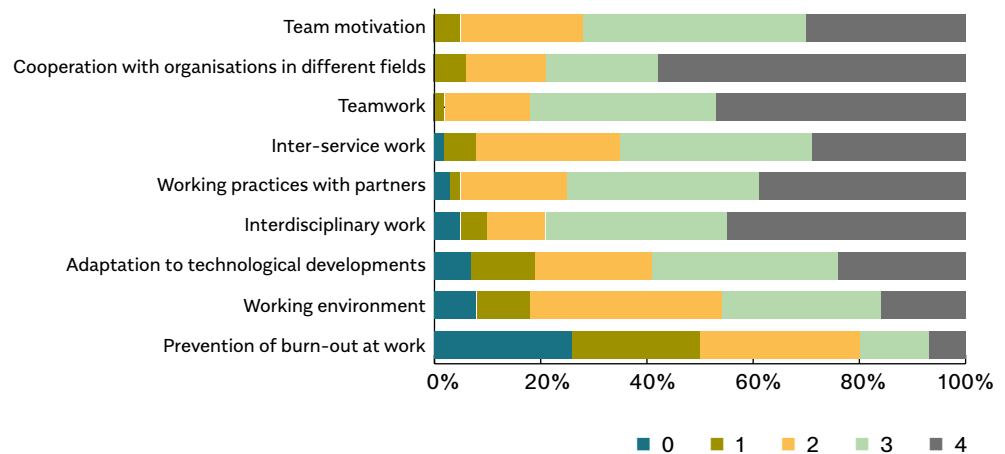
The survey shows that 65% of organisations conducting Erasmus+ partnerships have experience of European projects, in that they have coordinated LLP partnerships. This factor is a facilitator of change over time within the financed organisations.

Figure 8: Project impacts on the leading organisation.



#### What changes have occurred through the Erasmus+ and LPP projects?

(score from 0 - Not at all to 4 - Considerably)



Source: Project coordinator survey, 113 respondents.

Among the changes observed within the organisations, the project coordinators highlight the development of new collaborative working methods, the removal of work barriers between stakeholders and the development of transversal skills. However, these effects are not necessarily observed in relation to overall organisations, as the links established externally often hinge around a small number of professionals responsible for project follow-up.

## Impact on the staff in charge of the projects

Project coordinators recognise that Erasmus+ projects have a “training” effect, mainly in terms of collective organisation of work rather than individual skills (creativity, ability to summarise, language skills, etc.).

**Figure 9: Project impacts on the leading organisation – skills.**

*Which skills have been developed in the teams involved in these different LLP and Erasmus+ partnership projects?*

*(score from 0 to 4)*

	Average
Ability to work together as a team	3.47
Organisational skills	3.31
Ability to adapt	3.17
Other	3.12
Decision-making	3.10
Autonomy, taking the initiative	2.98
Creativity	2.77
Ability to summarise and analyse	2.75
Risk-taking	2.49
Language skills	2.47

Source: Project coordinator survey, 108 respondents.

## Impact on the service offering

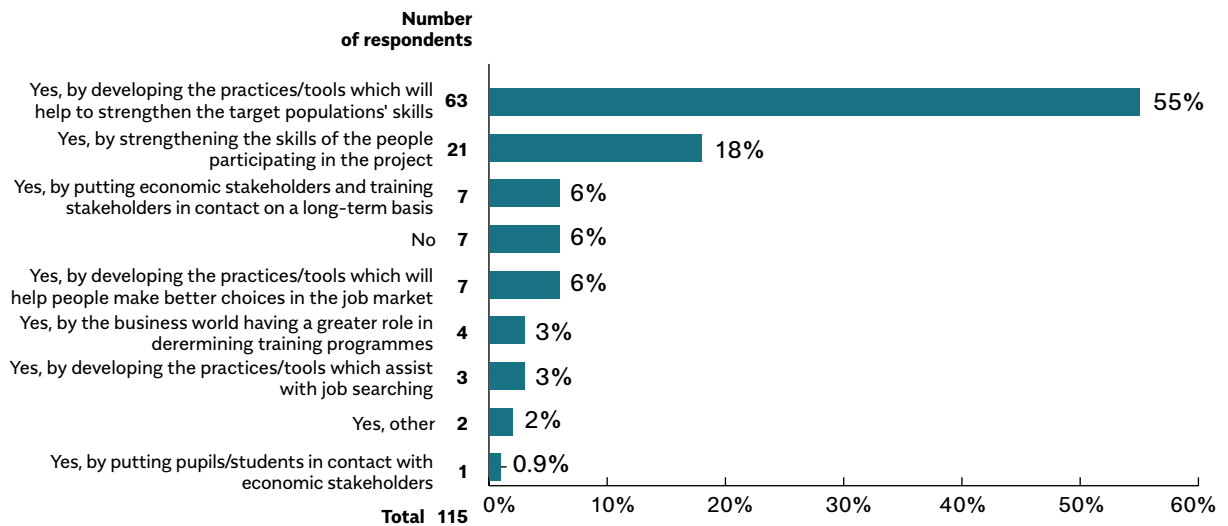
Developed exchanges within a project framework also represent resources that prompt lateral thinking within each organisation: the diversity of viewpoints and practices commits stakeholders to cross-fertilising dynamics in virtually all projects. The concrete actions and tools deployed under the partnerships relate to needs identified upstream and are therefore “customised” responses to the organisations’ challenges. They enrich an organisation’s service offering and allow professionals to develop new deployment prospects for their activities.

## A strengthening of links between education and the job market

93% of the project coordinators who replied to the online survey consider that their project contributes to strengthening links between education and the job market. Most of the projects studied qualitatively also confirm this strengthening of links.

**Figure 10: Project impacts on professional inclusion.**

*Do you think that your project contributes to the strengthening of links between education and the job market?*



Source: Project coordinator survey, 115 respondents.

The drawing together of education and the job market generally involves a better knowledge of the stakeholders or a greater consideration of companies' expectations in terms of developing training solutions.

## Building a typology of “impact-based” added value types

The study methodology enabled the creation of a typology of induced added values generated by the implementation of an Erasmus+ partnership. Partnerships financed in 2014 and 2015 mostly present several forms of added values: through the types of innovations pursued, their originality, involved public populations or new developments introduced into professional practices. Six forms of added values are distinguished by analysis and each project can claim to represent one or more forms.



Source: Infographic: Erasmus+ France / Education & Training Agency.



#### Added value 1: European scale as a multiplier

This form of added value is evident in the stakeholders' extended capacity for action due to the European partnership. The partnership mainly provides the opportunity to share and increase the means to implement the project on a larger scale. Furthermore, its transnational and transsectoral nature has a qualitative impact, generating new ideas for inclusion in the project. The action is not necessarily very innovative. However, it gives the project greater scope and creates conditions for achieving better quality productions.



#### Added value 2: The European project as innovation pathfinder

This form of added value is reflected in the creation of a space for innovation within organisations, to be gradually extended beyond the project. The partnership creates a secure space for innovation and enables experiments, at times ambitious, which would encounter too many obstacles in the organisations' day-to-day activities (lack of resources, resistance, too much effort involved in persuading people to take part, risk, etc.). It facilitates these innovations through the project's own resources as well as through the legitimacy provided by European support. This added value is reflected if at least some of the project's outcomes are eventually incorporated in the current practices of the partner organisations. These innovations can seldom be exported beyond the project partners (especially in the case of specific educational content) since the products created correspond precisely to the approaches of the partner organisations. Sometimes several successive projects have to be conducted to improve the chances of the innovations developed by the projects being incorporated or extending beyond the project partners.



#### Added value 3: making a difference for people with fewer opportunities

This form of added value is produced for projects which support public populations that usually receive little or poor support from common law mechanisms. They include a key aspect of method innovation, as these populations have differentiated needs, which are poorly addressed by standard methods. The partnership mainly has an impact on its target populations,



which are directly involved during the project. The opportunities for replicating or sustaining this outside a European project are hard to imagine, but the dissemination of part of the support “recipe” is consistently pursued.



#### Added value 4: developing one European best practice

This form of added value is based on identifying a best practice and disseminating it on a European scale. In fact, for a large proportion of EU stakeholders, distinguishing a particularly interesting and new practice is especially challenging, as “practices” need to be defined, assessed and tested on a European scale. Disseminating it throughout Europe is a second, equally large challenge. The partnership project enables a stakeholder to develop and disseminate a particularly interesting practice (in terms of innovation or for the populations), provided that:

- the “best practice” is properly identified upstream, upheld and implemented by the project partners, from the “source” partner to the “target” partner;
- the “best practice” really does make a difference: it clearly changes practices, with obvious effects; it generally triggers resistance as it disrupts the usual way of doing things.

This added value is reflected on a European scale if the practice is sustained in the normal functioning of the organisations and disseminated to other similar organisations which could adopt it.



#### Added value 5: creating opportunities for “local stakeholders” in Europe

This form of added value is observed when projects include small local stakeholders as well as organisations with European outreach in “project” processes. Setting up partnership projects is actually a complex task that not all organisations are able to undertake. By allowing a large number and a wide variety of partners per project, the scheme provides access to a European dimension and otherwise inaccessible resources. A typical example is provided by the collaborations between stakeholders in the field (schools, associations, etc.) and research stakeholders (universities), with the aim of putting methods or tools into practice.



#### Added value 6: stimulating European R&D applied to specific populations

This form of added value is based on the continuity between the development of innovation up until its experimental implementation and the feedback. It involves projects combining theory and practice and relying on the Erasmus+ programme for financing “Research & Development” (R&D) projects, including specific target groups (for example in adapted schools). Setting up a field experiment requires the involvement of stakeholders which are very different from one another (companies, universities, associations, schools, etc.), underlining a significant transsectoral increase in value. In keeping with a proper R&D approach, feedback is essential.

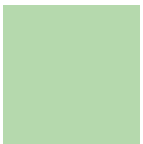
## Five success factors for Erasmus+ partnerships

A few aspects distinguish projects that are a priori more likely to contribute to the general perspectives of the Erasmus+ programme:

- Projects that include an experimentation phase deployed among public populations (not just among professionals). The proposed innovations are therefore better tested, improved by experience and potentially given greater thought upstream, as the stakeholders are focused on the requirements

of operational implementation. Moreover, there is greater potential for disseminating the innovations as their direct effects on the target public populations have been observed in the field.

- Projects that associate economic stakeholders in the hard core of the partnership from upstream (listening to needs) to downstream (experience feedback). These projects not only respond to the economic stakeholders' needs but also help project coordinators and their partners to understand and formulate their needs and therefore make the proposed solutions long term.
- Projects that specifically meet the needs and challenges of territories: some projects form examples by prompting the real interest of local stakeholders on the ground (authorities, companies, establishments, etc.) thanks to a customised approach that accounts for all partners from the solution development phases.
- Projects that embrace a European issue based on national problems. While economic, social and legal contexts on a national level may be different, practices can meet common challenges on a European level (training quality, educational methods tailored to the public populations, etc.) The "step sideways" is productive when structured by a powerful dialogue and capitalisation method, which has been well prepared in advance in each organisation and later studied.
- Projects that mobilise organisations on a widespread basis beyond the "hard core" of people appointed to manage the project. This is usually the condition for offering opportunities for broad internal and external circulation. The professionals effectively become ambassadors of approaches developed on their respective territories in their national networks. This also guarantees independent perpetuation of continued European financial support.



Home

# Teachers' Short-Term Learning Mobility Abroad from the School Improvement Perspective: Estonian Best Practice Cases

By Juta Jaani and Halliki Harro-Loit

## Abstract

The aim of this article is to present four Estonian best practice case studies of Erasmus+ grant projects. Because the schools are in different phases of their improvement journey, their needs for a learning mobility abroad are different. According to the collective qualitative interviews carried out among the staff of those four schools, an efficient use of the grant starts from well-grounded knowledge about the needs of the teachers and the needs of the school – there might be different ways to gather this information. Some schools have a well-developed monitoring system while others focus on constant dialogue. It is also important to create a good system for selecting teachers.

## Introduction

Since 1998, Estonia has been involved in teacher in-service training –programmes. By 2014, approximately 3.6% of teachers – the overall number of teachers being about 22,800 – had had the possibility to study abroad via the EU programmes.

In 2014, the focus of the Erasmus+ programme was changed: from individual teachers' applications to educational institutions' applications. That change meant the necessity to synchronise the needs of individual teachers with the needs of the school. This paradigmatic change brought about different challenges. First of all, before applying for the grant, the school leaders and the teachers should find out and negotiate the exact school need which can be met via an Erasmus+ short-term mobility project. Hence, communication about mutual concerns and aims between staff members during the planning phase of the grant becomes decisive. Secondly, the question "who will go on the learning mobility?" becomes more complicated if the needs of the school improvement are taken into consideration. A dilemma needs to be solved: should the school prioritise sending abroad the "eager-to-go teachers" or the ones who are (or could become) the key persons in the school's improvement process?

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## KEYWORDS

SCHOOL IMPROVEMENT JOURNEY, BEST PRACTICE CASE STUDIES, COMMUNICATION IN THE PLANNING PROCESS, PARTICIPANT SELECTION DILEMMAS



In 2014–2017, about 800 learning mobilities took place in Estonia via the Erasmus+ programme (before Erasmus+, 828 learning mobilities of education staff had taken place). At the same time, the schools applying for grants were in different phases of their improvement journey – where “each phase builds capacity for the next” (Hopkins et al. 2014, 259). We use the journey approach in this article in order to describe and explain the need for flexibility in planning and using an effective Erasmus+ mobility.

While taking into consideration the differences in improvement journeys, research on Erasmus+ learning mobilities should also inquire about the effectiveness of these mobilities. Scheerens (2014, 286) distinguishes various effectiveness-enhancing conditions that have been developed in educational effectiveness research: effective leadership, academic focus, a positive orderly climate, high expectations, monitoring progress, parental involvement, effective teaching (time), professional staff development, and pupil involvement. Grounded research on the Erasmus+ mobilities of Estonian schools confirmed that most of these conditions were relevant also in relation to the schools' ability to plan and use grant money. Still, there is one additional condition: dialogic communication. According to Padros and Flecha (2014, 215), “...the promotion of change and transformation that takes dialogue into account includes the role and involvement of teachers.”

Dialogic communication is related to a school's awareness of its special needs or focus. This awareness is, on the one hand, based on the leaders' knowledge (and information gathering methods) about the status quo at the school. On the other hand, it is based on communication between staff members about the school's improvement focus. Finally, the negotiated need of the school and teachers should be synchronised with the possibilities of an Erasmus+ project: a structured course abroad or a job shadowing or teaching experience abroad. The last two mobility formats require some network or previous contacts.

School improvement journeys are diachronic: the previous experience of “learning from others” is built up year by year, as is the network of partners. In the context of short learning mobilities abroad, it is important to take into consideration that the schools which have already used teacher exchange programmes and/or have developed teacher exchange experience over time have an advantage.

The aim of this article is to present a description and analysis of four different “best practice” case studies from Estonia: a small school with limited previous experience of study abroad projects but a clear vision of its needs (Vääna Manor School); a very big school with long experience of international exchange projects (Viimsi School); a medium-size city school with long experience of international exchange projects, a very well developed openness ideology, and a “learning from others' practices” strategy (Pae Gymnasium); and a school with long experience of international exchange projects and a very specific need to import innovative knowledge related to children with special needs (Ahtme School).

The school *improvement journey* approach – which includes the focus and previous experience of “learning from others” – addresses challenges related to the evaluation process concerning Erasmus+ grant applications. These challenges will be discussed in the conclusions.

On the basis of these four case studies, the article aims to present an analysis of three aspects:

- Best practices on finding focus and the role of leaders and project managers;
- The importance of communication in the planning phase;
- Dilemmas and solutions concerning the WHO question in the context of the needs of the school.

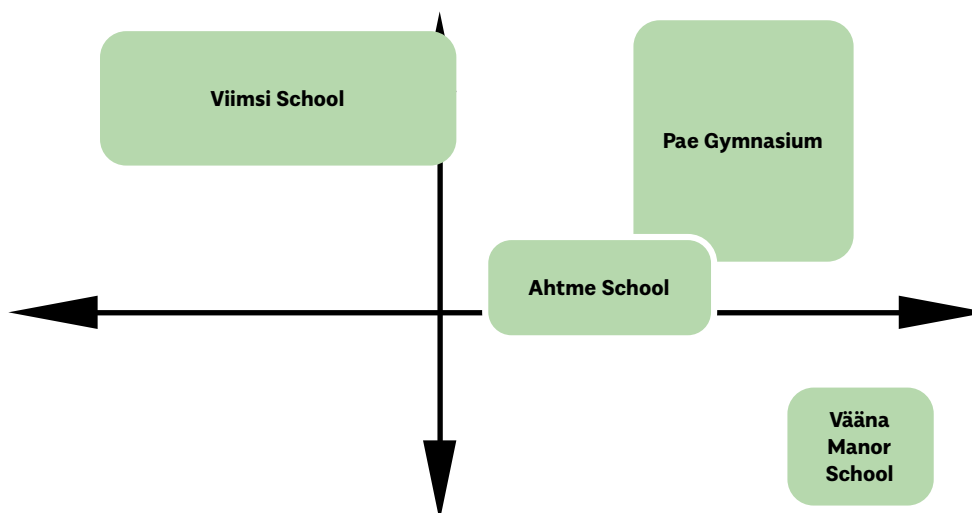
While discussing the various features concerning the planning process, we aim to analyse one central problem – WHO are the teachers whom the school would like to send on a learning mobility? Some teachers might be reluctant to go abroad, as they might experience a language barrier or they might just be afraid of going alone. At the same time, some teachers might be eager to go abroad, but it might not be clear how the school would benefit from their mobility.

## Estonian best practice case studies: the four different schools

When schools apply for and receive Erasmus+ mobility grants, one quality criterion for a good application is how it represents the needs of a particular school at the present time – in other words, it is good if the application somehow reflects the phase of the school's *improvement journey*.

In describing the four best practice case studies, we used two main dimensions and four variables.

Figure 1: The X-axis shows the clarity of the focus and the need of competency that is planned to be achieved via a mobility project. The school's diachronic experience is presented via the Y-axis. The rectangle presents the number of teachers and/or projects that the school has had.



The *focus dimension* (X) is related to the question of the clarity of competency that the school aims to import from abroad and adopt. The *first variable* characterises the number of teachers who already share the competency that the school wants to improve. If many teachers of the school already have high competency and experience in a certain field, the aim of applying for the grant might be to maintain and develop a high competency centre in that particular field.

The *second variable* characterises the innovativeness of the competency that the school would like to import and adopt. In this case, the teachers might have limited competency and experience in the particular field that the school wants to improve; and a learning mobility abroad enables the school staff to efficiently import ideas and practices.

The left side of the *focus dimension* (X) is reserved for those applicant schools which do not have a clear focus and rather rely on "offers", e.g. the content of courses and the interest of teachers. Those schools were not included in the "best practice case studies" of the present article.

It should be noted that specialised schools might seem to have some advantage in the "focus dimension", but those schools also have a disadvantage, as it might be more complicated to find courses and partners for their special interest.

The *diachronic dimension* (Y) is related to previous experience of "learning from others" and to exchange programmes. The *first variable* of diachronic experience characterises the *number of projects*

and contacts that the school has acquired in previous years. The *second variable* characterises the *number of teachers* who have acquired mobility experience. The second variable also reflects the values of the school. In one school, there might be few teachers who have participated in several learning mobilities; while in another school, a great number of teachers might have been studying abroad (or used to visit their colleagues in other schools). At the same time, the diachronic dimension enables us to reveal a value that might otherwise get lost in Erasmus+ projects – any change in teachers' competencies and school improvement takes time and consistency.

By using these four dimensions and four variables, we will characterise the four cases of Estonian schools which have been successful Erasmus+ grant users.

The analysis (2016) is based on 8 focus group interviews (4 with mobility and 4 with non-mobility teachers) and 4 individual interviews (with the school leaders) in these four best-practice schools.

### **Pae Gymnasium (comprises 12 grades)**

Pae Gymnasium is situated in Tallinn, the capital of Estonia. It has about 1,000 pupils in grades I–IX (basic school) and 150 students in grades X–XII (secondary school). It is a *language immersion school*; and both the leader of the school and the teachers emphasise their long experience of competency building in this field: *“We have more than 10 years of experience with the application of CLIL (Content and Language Integrated Learning).”*

The number of individual teachers who already have mobility experience is one third of the staff. It should be mentioned that Pae Gymnasium has a designated project manager for the Erasmus+ project; so, in this case, it is not the principal of the school who takes care of the project management.

The journey of Pae Gymnasium is in the phase of developing the concept of language immersion towards a competency centre by increasing the number of expert teachers with growing expert knowledge.

**A mobile staff member at Pae:** *“We have some things at our school that work very well: a long tradition; and it would not be necessary to start inventing something completely new; but, indeed, we could develop some things further or increase the number of teachers who make use of the project.”*

The “learning from others” concept is one basic principle that is shared among the staff, but Pae Gymnasium is an exceptional case because the process is seen as a two-way one: the teachers learn from others (domestically and abroad), but they also share their experience with colleagues from other schools abroad. Pae Gymnasium represents a case where the mobility project is used for increasing teachers' self-awareness and confidence.

**A mobile staff member at Pae:** *“Confirmation of the fact that Estonian education and schools are at a high level and that the Estonian teacher does a good job. Assurance that the language immersion method chosen by our school works (is a step ahead compared to the others) and the school is moving in the right direction. Assurance that our knowledge of foreign languages is sufficient for interaction with people of other nationalities.”*

Conceptually, Pae Gymnasium represents a case where the mobility project should be conceptualised more as an opportunity to develop a partnership. According to the principal of the school, teachers are expected to become training instructors; and internationalisation works as a two-directional approach.

Hence, Pae Gymnasium can be distinguished by its openness as a value actually practiced also outside mobility projects. They claim that a general openness and a critical mass of self-confident teachers who have had the opportunity to compare their teaching experience outside of their own school have a cumulative effect that makes it possible to position the school on the "journey route" among the competency centres. At Pae Gymnasium, the language learning process has systematically been made accessible to parents and other teachers. Once a month, the school holds a CLIL week; during that week, both the parents and the teachers have the opportunity to visit lessons. A CLIL conference takes place during school holidays.

## Vääna Manor School

Vääna Manor School is a small local school (97 pupils and 32 kindergartners), which had no previous experience in using study abroad grant possibilities. As it is a best practice case, it is important to point out its leaders' efforts regarding communication and team-building as well as the planning process. The Vääna Manor School case contrasts with the Pae Gymnasium case because the school has no mobility traditions and no critical mass of teachers who already have contacts and previous experience both with learning and teaching abroad. On the contrary, this school represents a case where the Erasmus+ project planning process was more or less integrated into strategic school improvement, more precisely, what contributions and competencies were needed the most and how those would affect the public image of the school was taken into account.

**Vääna Manor School, non-mobile staff member:** *"The school has obtained a strong image thanks to the fact that so many things are done here and that we have our own firm vision, and therefore very many children want to come and study here."*

The focus of Vääna Manor School was perceived to be more specific than that of Pae Gymnasium. As Vääna Manor School is surrounded by a beautiful park, it has been developing an outdoor learning approach. As mentioned earlier, this school has just started its journey, but, just like in the case of Pae Gymnasium, its vision includes a two-way learning–teaching approach. In comparison to Pae Gymnasium, the teachers have problems with self-confidence, and openness is a goal rather than a daily practice.

Vääna Manor School also represents a case where the principal of the school has a significant effect on school improvement, especially via dialogic leadership.

**A teacher of Vääna Manor School:** *"The new principal came three years ago – before that, there was nothing. ... She picks up practical ideas immediately and asks what we are going to do with them next, why we are going to do it, what it will give us, and where it will take us, whether it is sustainable, etc. ... She always agrees with all kinds of ideas and innovations but also offers real and practical assistance."*

Finally, the principal of Vääna Manor School points out the benefits of an academic mobility for her school; and this summary also reflects the values that govern school improvement. Openness, internationalisation (e.g. "reading articles in another language"), and diversity are clearly reflected values.



## Viimsi School

Viimsi School is one of the largest in Estonia (about 1,400 pupils, grades I–XII). It is situated near Tallinn. As the school has been using exchange programme opportunities for about 10 years (an active participant in Comenius exchanges), by now the number of its staff who has been abroad is large enough to evaluate the outcomes of learning abroad. At the beginning of the exchange programmes, the school supported more eager teachers who received individual grants.

The case of Viimsi School is different from those of Pae Gymnasium and Vääna Manor School, as the school has only recently been paying more attention to its needs in the field of internationalisation. Differently from Pae Gymnasium, Viimsi School highlights “internationalisation”; while at Pae Gymnasium, internationalisation is part of a more general openness approach. At the same time, the school has a long tradition of networking and has built sound relations with several schools abroad. The leader and staff agreed that it is difficult to start strategic cooperation with partners whom you do not know. In addition, Viimsi School – as a very big school – represents a “diverse focus” (e.g. a general interest in developing assessment literacy and inclusive education).

## Ahtme School

Ahtme School is an educational institution for students with special needs (there are Estonian- and Russian-speaking groups; teaching is provided according to the simplified national curriculum). It is a national school for children with learning disabilities (about 75 pupils, 7–17 years old). The school has a long tradition of international cooperation and has already built partnership relations with schools from the UK, Turkey, and Spain with the help of Comenius and other programmes. This case represents a very specific focus: the aim was to develop skills related to education for children with profound mental retardation. The best experience is related to job shadowing in the UK. Just like in the case of Viimsi School, the partnership with the UK school started through a Comenius project.

As the school needs very specific competencies, the aim of the mobility project was to learn very practical skills.

**A mobility teacher of Ahtme School:** *“In my class, there is a child in a wheelchair; and that is a new experience for me. If I had had this pupil last year, I would have panicked, but now I knew where to start, what I should do. ... No theoretical course would give you these skills. ... It was an extremely useful experience.”*

In addition to practical learning, Ahtme School also represents a case where the teachers are adopting and developing the methods they learned and are ready to disseminate their newly acquired skills among interested peers.

## Finding the focus of a grant application

The effort to define the focus and aim for the grant application depends on how much the leader(s) of the school or the project manager know about the needs of the individual teachers and of the school. Another question is how the relevant data and knowledge are acquired.



The principal of Pae Gymnasium described the method of developing her awareness of these needs. The monitoring is hierarchical: the heads of the regional subject-specific teachers' societies and the members of the management share the workload of talking to the teachers, while the principal of the school systematically visits lessons. As expressed by the principal of Pae Gymnasium: the aim is to get a holistic picture of the skills and activities of the teachers and pupils. She also points out the need to track the development of the teachers. It is also her task to visit the lessons of language immersion teachers.

The principal of Vääna School points out the need to merge three aspects: the objectives of the school, the interests of teachers, and the options for training. She found the focus in the already existing strengths of the school, although she does not specify the methods of gathering information. However, Vääna School is a small school and therefore the information about the situation is more easily accessible just via daily conversations among colleagues and pupils. The principal also points out that thanks to the project, the development objectives of the school became clearer.

There are different approaches to who should be the catalyst for the ideas, although all interviewees point out the need to discuss the ideas. This means that although the interviewees do not express it very clearly, the project managers need to estimate the amount of time which should be allocated to cover communication-related tasks. The principal of Vääna School points out the need to discuss the ideas and the focus, although she sees herself as the main take-off force.

**The head of Vääna School:** *"The best managed project is the project where the ideas proposed by me are accepted by the teachers, where these ideas become part of their plans. I strive towards the teachers taking responsibility for the plan. I put an idea on the table, and then we discuss it jointly with the whole team."*

In bigger schools, the focus comes rather from the leaders or the project manager, who has been involved in monitoring the situation and the teachers' interests and needs as well as the expected result of the project. Already in the project planning phase, there must be a firm vision and understanding of what should be done and what the school wants to achieve and what it needs for this purpose. The project manager must always have a good justification for selecting a certain person to participate in the project as well as have an overview of how each person has contributed to the project.

At Viimsi School – a very big school – the ideas are generated in small working groups (4–5 people). If the project is funded, the number of participants increases. Information about the needs of the teachers is collected mainly via annual development conversations with the teachers. Nevertheless, it should be mentioned that while the Ahtme and Pae schools had their focus already prescribed, the Viimsi and Vääna schools did reflect relatively little on how exactly they analysed the current state of the needs of the teachers and the school.

## Communication in the three phases of an Erasmus+ project: planning, adaptation, and implementation

The quality of communication is one of the reasons why projects are successful or unsuccessful. Communication is a category that is approached quite differently in the best practice schools.

The principal of Vääna School is the one who especially emphasised the significance of communication in the planning phase. It is important to point out that the principal talks about critical discussions and not only about informing teachers of the project possibilities.

The teachers of Vääna Manor School point out the importance of the Erasmus+ project discussions for team building and values clarification – during the planning phase but also during the adaptation and implementation phase.

**A non-mobile teacher at Vääna:** *“When somebody has attended an event and become inspired, then it also carries along the others. We discuss how we could make that experience even better and put more of it into practice. ... Today, we have a perfectly functioning and trustworthy team at our school. .... As we share everything and all the teachers of our school do the same things, e.g. outdoor learning, it unites us as a school.”*

A teacher of Vääna Manor School who belonged to the mobile staff said that the teachers try out what they have learned at their courses with their colleagues, they themselves use what they have learned and thereby give new ideas to their fellow teachers as well.

In comparison to Vääna Manor School, the communication at Pae Gymnasium is more oriented at information sharing than dialogue and values clarification. The project communication at Pae Gymnasium is also oriented at image building. A comparison of these two orientations illustrates how many different communication approaches could be developed in the different phases of project management.

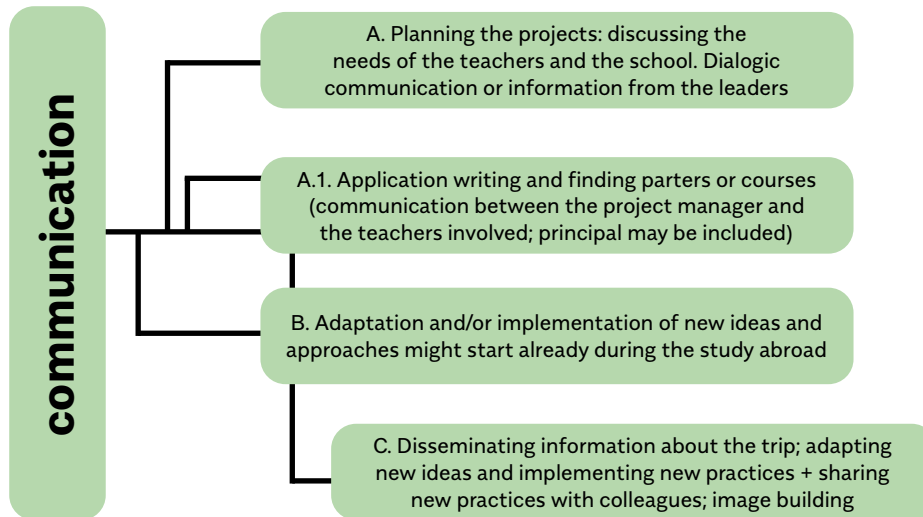
**A non-mobile teacher at Pae:** *“It has become a tradition to conduct a Teacher to Teacher conference, where we share our experience. There are also guests from other schools attending these conferences. ... I think that the school is very proud when somebody has been somewhere, and then it is also covered on the radio ... In such a case, the person in question feels very good and the pupils are also very happy. This is very important to people.”*

At Ahtme School, communication starts mainly from the school leaders. Unlike at Vääna Manor School, communication as a specific activity is not mentioned by the interviewees; instead, they use the word “cooperation”. **As a mobility teacher at Ahtme School said:** *“... the school leaders inform the teachers about what they expect from them.”*

The same type of communication – from leaders to teachers – is mainly used at Viimsi School.

Thus, to a greater or lesser extent, “communication” was an important keyword at all four schools, but only Vääna Manor School explicitly described the dialogic communication and the added value (values clarification and unity building) that was achieved via the Erasmus+ project. It is true that size matters – communication and involvement are easier to achieve in smaller institutions. It also seems to be true that if the school already has a very specific focus and the communication aims and the patterns are systematic (a special week to visit classes, a conference after the learning mobility at Pae Gymnasium), communication may have become a natural daily routine.

Figure 2: Different communication activities in the different phases – planning (A), adaptation and implementation (B), and dissemination (C) – of an Erasmus+ project.



Communication is usually connected with the dissemination activities undertaken after a learning mobility. 89% of the mobility teachers from Estonia made a presentation to colleagues after the mobility. 20% of the teachers invited their colleagues to visit their lessons. 79% developed new materials (Piksööt et al., 2016) – but we do not know about the communication of these new materials. This result reflects the fact that communication in all phases of the project should receive more attention. The adaptation and implementation of new ideas and methods also involves communication; but it should be more dialogic communication rather than just the dissemination of information.

### Selection of project participants: dilemmas

The school should decide what principles are applied in the (s)election process of teachers who will get the opportunity to go on a learning mobility. The first dilemma – whether the mobility grant is a possibility for those who wish to go or an obligation for those who need it – includes several sub-questions. For example, what are the motivating factors for going or staying? The latter might be connected to some barriers (e.g. language barrier) or age (in 2014–2015, about 43% of those who received a grant had 5–15 years of teaching experience), objective circumstances (family situation that makes a leave impossible, etc.), or the opinion that there is no need to go abroad in order to learn from others.

The second “level” is not connected to the wishes of the school but to the application options. In some cases, the schools would prefer to send more than one teacher to the same place – that would enable the teachers to discuss the implementation ideas already during the mobility.

The third “level” is connected to the preferred subject: language teachers use the opportunities to go on learning mobilities more than the teachers of other subjects. In 2014–2015, 42% of the mobility teachers in Estonia were language teachers.

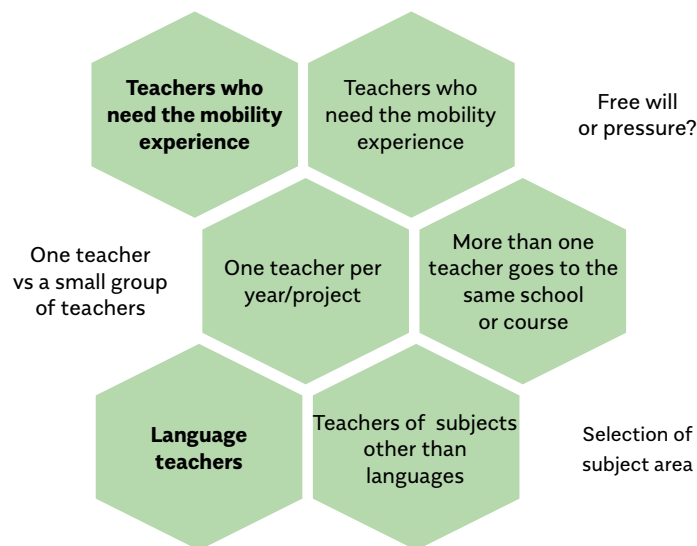
There is also a fourth dilemma, which is not directly connected to the (s)election of participants. It is the form of the study: in Estonia, it is mainly the choice between structured courses and job shadowing. As most of the interviewees agreed that job shadowing or a combined format (courses + school visits) are the most efficient, it is important to mention that it again depends on the mobility experience and the network that the school already has.

**A mobility teacher at Pae:** *“... the most effective form of academic mobility is the most difficult and labour-intensive option to organise; as finding the most appropriate partner takes time, and it also implies accepting additional obligations, e.g. inviting the partner school to visit us or giving open lessons. At the same time, the least effective training course is the easiest and fastest to arrange. Teaching an unfamiliar class constitutes the greatest challenge to the participants; however, it gives experience and a feeling of confidence for the future.”*

In 2014–2015, only 15% of the Estonian teachers who took part in Erasmus+ learning mobilities used the Erasmus+ opportunities for job shadowing and as few as 2% conducted lessons themselves, all the others participated in some courses (Piksööt et al., 2016).

Thus, as presented in Figure 3, the school has three different types of dilemmas: motivation vs need, one individual vs group (that dilemma is related to the application options), and the preferred subject. The horizontal approach to the figure reveals that the left-hand hexagons present the traditional and more comfortable choice for the school, while the right-hand hexagons might present more efficient solutions for the school.

Figure 3: Who will go? Three levels and “columns” of dilemmas.



The first-level dilemma is connected with various barriers: a language barrier and personal objections. Most principals agree that teachers should not be forced to participate in the project and should instead be encouraged to participate. There is one fear that restricts teachers from participating: the language barrier.

**The principal of Vääna Manor School:** *"... the language barrier constitutes an obstacle that could be overcome if two different persons who see the training from different perspectives could attend the same training; and later on, they could also implement the ideas better at school... We actually have special English courses for teachers."*

The same readiness is pointed out by the principal of Ahtme School, but she simultaneously believes that the teachers should develop their own competencies in project management.

As said above, at Viimsi School it is the project manager and the leaders who select the focus. They said that they recently changed the participation ideology and support those teachers who have not been involved with mobility projects. Another specific selection criterion is "specific school level". This approach includes team building in order to raise the efficiency of job shadowing experiences (*"Each team includes the carrier of the idea and a key person, one support specialist and one teacher, in order to foster the emergence of a network"*). Hence, Viimsi School has been moving towards the "right-hand hexagon" (Figure 3) choices.

The principal of Viimsi School also explains in her interview why they prefer to send a small team of teachers on a learning mobility. As this dilemma – *one or more teachers per course/school?* – was mentioned also by the other principals, it is important to pay more attention to this aspect. While the principal of Vääna Manor School noted that more than one teacher means sharing ideas, the principal of Viimsi School points out that if at least two teachers participate, they "see different things". This actually means that the adaptation of new ideas and methods starts already during the learning mobility – the teachers can discuss the ideas among themselves immediately.

The criteria for participating in an Erasmus+ project were most explicit at Pae Gymnasium. This school also evaluated the teaching quality criterion and self-motivation to invest time in self-development. The teaching quality criterion is connected to the image building ideology, as the teacher always represents the school. At the same time, the principal said that opportunities should be equal.

## Conclusions

The four different cases presented here raise the question of how to improve the application process so that the schools with long experience are motivated to be more clearly focused, use job shadowing possibilities more often and are able to send more than one teacher on the same mobility if this need is justified.

The four case studies enabled us to reveal the difference between the schools: Vääna Manor School provides the best example for communication and team building as a side-effect of the management of an Erasmus+ project. Pae Gymnasium has an impressive procedure for systematic analysis and data gathering about the needs of the teachers and the needs of the school. They are also a good example because of having been successful at using Erasmus+ projects for image building. Viimsi School has been improving sophisticated participation – the (s)election system – and the focuses of the projects seem to

be developed via this system. Ahtme School presents a case where practical methods are actually learnt via mobility projects, as the needs of the school are so specific.

The success of these four cases was connected to the clear focus of the project. Focus is like a scale. On one side of the scale, the aim might be to deepen existing knowledge and introduce the experience of Estonian teachers to foreign colleagues (Pae and Ahtme). On the other side of the scale, there might be a need to import a new idea, methodology, or practice (Vääna and Viimsi).

In conclusion, when it comes to efficiency, the conditions, good focus, and planning (especially the adaptation and implementation of new ideas) in the project writing phase certainly increase the efficiency of using the grant. As the four case studies demonstrate, the planning process is looked at very differently in different schools. The case of Vääna School demonstrates that dialogic communication makes it possible to create an efficient planning process even if the school does not have much experience with project implementation.

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# How the other becomes one of us – the main findings of “The impact of European Voluntary Service on local communities” research

By Sandra Zaidova and Vaiva Ružaitė

## Abstract

“The impact of European Voluntary Service projects on local communities” research aimed to find out what happens in the organisations and communities that host European Voluntary Service volunteers. This article presents the main insights of the research trying to describe, interpret and explain how people collect experiences, perceive themselves and their surroundings, and create interpersonal relationships living and acting in a particular group, organisation and community.

## Introduction

When a foreign volunteer comes to a small community the process of breaking stereotypes, taking more interest in other cultures, revising perceptions about other people, building trust, understanding and empathy starts. People open their minds to different people and attitudes. Then the fear of foreigners starts to dissipate.

Usually European Voluntary Service is seen as an opportunity for young people. It is the possibility to gain knowledge and experience, broaden horizons, learn about other cultures, contribute to society, find new friends and learn foreign languages. Most of the research focuses on and emphasises how many young people took part in volunteer activities, what experience they gained, how this service helped them personally and professionally, and how their lives have changed.

What remains less explored is the impact on the community which hosts a volunteer. There are huge processes going on within the community while it is waiting for the volunteer to come, as well as when the volunteer arrives, the adaptation period starts and the whole daily routine of an organisation and/or community is affected. A learning process always takes place and it helps to know more about the other

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## KEYWORDS

**EVS, LOCAL COMMUNITY, IMPACT, REFLECTION, SOCIAL CAPITAL**





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Non-formal education and  
youth work are a source  
of inspiration for her and  
she strongly believes in the  
impact these areas bring  
to people and communities.

and oneself. One generally doesn't pay enough attention to the process of waiting for and preparing to meet a young person from a different country and culture who knows little about the community he or she is coming into but wants to help in making some changes. The European Voluntary Service impact on local communities is like an iceberg whose hidden part is much bigger than that which can be seen, so that's why the research “The impact of European Voluntary Service projects on local communities” tried to make this part more visible.

## Methodology

The idea of the research “The impact of European Voluntary Service projects on local communities” was born after looking at the research-based analysis and monitoring of Youth in action and Erasmus+ Youth programs (RAY) research<sup>1</sup> results, which indicate that European Voluntary Service projects have a significant impact on the local environment in which they are implemented. According to the RAY 2014 study, 95.1% of EVS project leaders claimed that the local community had shown interest in the EVS project carried out in their town. Based on RAY findings, the main research question was raised: what are – in general terms – the impacts of a long-term EVS project on the target groups of the hosting organisations and the local communities where EVS volunteers carried out their service? Hungarian, Polish and Lithuanian Erasmus+ National Agencies initiated and conducted a qualitative analysis in order to observe and explore the impact of long-term EVS projects. This article outlines the key findings of case studies conducted between 2014 and 2016 in Poland, Hungary and Lithuania.

In this research the target group comprised small communities in Hungary, Poland and Lithuania which for the first time hosted foreign volunteers. The research was conducted in three stages: during the preparation to host a volunteer; during the voluntary service (at least 3 months after the arrival of the volunteer); and after the volunteer's departure. The research project consisted of three phases and used the research methods presented below.

The first research phase was carried out before the volunteer's arrival (October–December 2014). The aim was to provide a general description of the hosting organisation, its target group as well as the local community where the EVS project was to be implemented, and to find out the expectations and fears regarding volunteers and the EVS program in general. Researchers conducted individual and group in-depth interviews

<sup>1</sup> RAY stands for “Research-based analysis of Youth in action” – it is a transnational research project implemented by 31 National Agencies of the Erasmus+ programme and coordinated by the University of Innsbruck. For more information see: [researchyouth.eu](http://researchyouth.eu)

with representatives of hosting organisations, as well as representatives of other similar organisations from the same town.

The second research phase was carried out during the volunteer's work (March–June 2015). The aim was to carry out an in-depth analysis of volunteers' tasks and their involvement with the target group of the organisation and local community, as well as to find out how the EVS project was perceived by members of the local community and the volunteers. Individual in-depth interviews with the volunteers and group in-depth interviews with representatives of organisations and of their target groups were conducted.

The third research phase was carried out after the volunteer's departure (November 2015). The aim was to see the situation in the organisation and in the local community after the volunteer had left and to grasp what changes in the organisation and the community had taken place because of EVS and the presence of volunteers. Another aim was to learn of the challenges and success stories of implementing EVS as well as of the benefits of EVS for the organisation and local community. Individual and group in-depth interviews with the representatives of organisations and of their target groups were carried out. In addition, the volunteers filled in an online questionnaire after returning home.

## Main findings of the research

Firstly, the research showed that foreign volunteers influence hosting organisations and their workers. The volunteers not only support them in their everyday tasks but also contribute to their professional development. Host organisation workers learn how to function in a multicultural and multilingual environment and how to plan and delegate tasks (often for the first time in their career), as well as develop foreign language skills. The workers also underlined that thanks to the presence of EVS volunteers they had a chance to take a different perspective on the work and mission of their organisation. Moreover, the presence of EVS volunteers, in most of the cases, contributed to improving the image and capacity of the hosting organisations.

Secondly, the EVS volunteers have a significant impact of the target groups of the hosting organisations. They are present in their lives for almost a year, bringing their culture and language closer to people who otherwise would have little chance to spend time with a foreigner. The representatives of the target groups (young people, people with disabilities, the unemployed) many times reported that the presence of the EVS volunteer changed their perception of certain issues and had a positive influence on them.

One worker of a host organisation said:

*"The most important was mutual understanding between us and volunteers. At the beginning we were thinking that we don't need international volunteers, because we heard various opinions about foreign people and it will be just extra work for us. But now we are very happy that we hosted EVS volunteers, they did more than we expected, they didn't do something very big, but what they did – they helped us to break the stereotypes."*

Thirdly, in some cases EVS volunteers had a visible influence on the inhabitants of the towns and villages where the EVS project took place. They were, very often, the only foreigners in town, and their presence was visible from the very beginning of their work. The local communities became used to seeing and communicating with a foreigner on a daily basis (for example at the shop, local café or in neighbourly relations). At the beginning of the research communities shared many stereotypical attitudes towards foreigners. Communities which for the first time hosted an EVS volunteer from abroad had the very first, real and authentic experience working with a foreigner that broke such stereotypes. Locals started to be interested in other cultures, trying not to judge but instead – to understand.

At the beginning of the research one of the informants said:

*“Well, we are interested in the religion... People are interested in different religions, how they are praying, what are their traditions, why they are not eating pork if we are eating, so why their religion is not allowing them, how many wives do they have. We want to get to know.”*

At the end of the research the same informant stated:

*“Well, you know, foreigner or Lithuanian for me has become the same, there are no differences. If you are communicating with them normally like you would communicate with Lithuanians, like you would communicate with any human, then they are communicating normally as well. There is no difference. Just people have experienced that they are also humans.”*

→ **“The other” – a volunteer from abroad – leads the community to reflect and learn**

The research has shown that people communicating with EVS volunteers started to be more open to “other” people, to “other” or different attitudes. The volunteers helped to decrease the distance between the community and its “other” members: as they did not have any prejudices or opinions about the locals, they tried to connect and communicate with all community members, including those who experience social exclusion.

One of the representatives of a community said:

*“Not only with young people, with everybody volunteers were communicating, they knew even all drunk people, everybody were friends to them. They don’t judge people, they show respect to everybody, to old people, to drunk people, they respect all humans.”*

The volunteer thus became an example of tolerance and acceptance that the locals could learn from. Hence, in some cases communities have changed under the influence of EVS volunteers – they have become slightly more open and able to trust “others”.

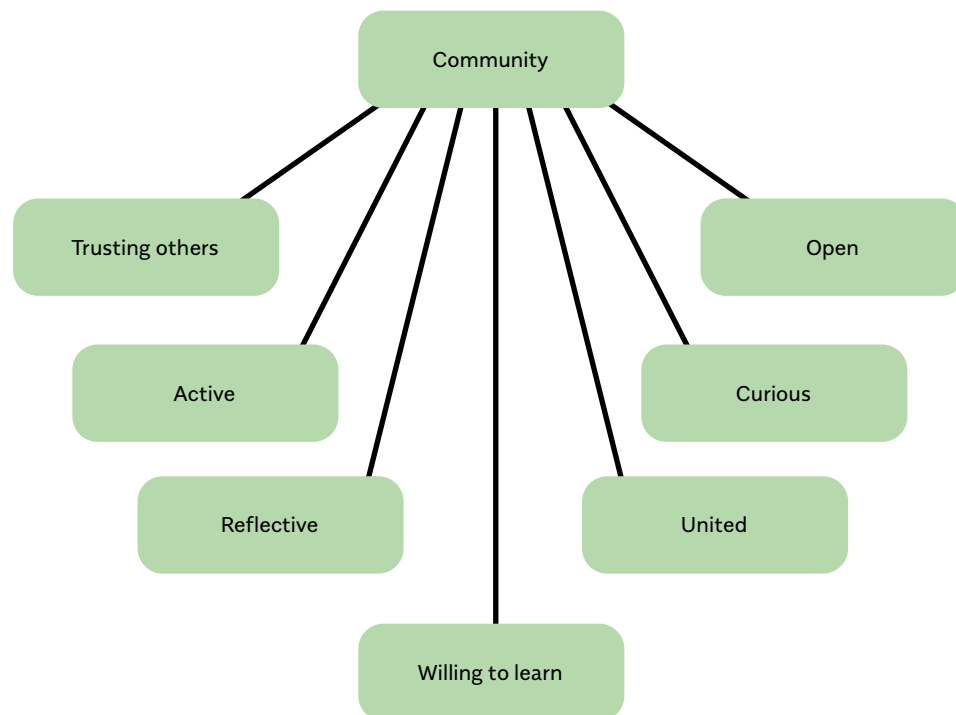
A volunteer shared: *“Talking about people of the park, and I am talking not only professional level, but human level, maybe to leave them more open, staying a lot of time together, talking of many things, you know also like immigration, politics, Greece situation, migrants and, I don’t know, gays, rights, all these kind of things and sometimes they can be very closed some of them, maybe my point of view can put the doubts in them when we argue, so I think this could be good for them as it is good for me to see their point of view.”*

The research has also shown that EVS helps to unite community members in common activities. Locals have become more active, taking part in various activities, organised around EVS volunteers. Community members take care of the volunteers and volunteers have become a tool for bringing members of the community together. EVS volunteers have encouraged communities to start cooperation with local organisations. This research insight revealed that we could look at the EVS program as a tool which unites local communities.

In some cases, EVS was one of the factors that provoked reflection – representatives of both the hosting organisations and the local communities started to reflect on and sometimes even question themselves, identify their weaknesses and, in consequence, deal with them. Participating in the EVS program encourages communities and organisations to raise questions, to doubt and rethink the attitudes and working principles of an organisation or community.

According to the research data it was visible that some of the communities increased their social capital. Members of communities started to be more active by participating in various events. They started to trust each other and “others” much more, started to be more curious, willing to learn and reflect on the experience.

Figure 1: Characteristics of the community



What is interesting, foreign volunteers have a lower perception of their influence on the local communities they worked in than the representatives of hosting organisations. This may be due to the fact that volunteers are present in the local community only for a limited period of time and hence are unable to recognise the changes in the local environment. The representatives of the

hosting organisations, who know their communities much better than the volunteers, are much more objective when it comes to assessment of the influence that international volunteering exerts on local communities and in most cases their assessment of volunteers' influence was much higher. Thinking about people who work with foreign volunteers, the research shows that it is important to give feedback to volunteers about their influence and changes they bring about at the place where they volunteer; this might give them a sense of the larger importance of volunteering and motivate them to do more for the locals.

### → **The perception of volunteering by the hosting organisation**

In general, two approaches of the hosting organisations could be observed: some hosting organisations treated volunteers as guests and tried not to entrust them with any serious tasks. These organisations seemed to be less aware of the importance of volunteers' learning process. Other organisations, however, put the volunteers' learning process in the centre of the project and treated them equally to regular employees – in this case volunteers felt well integrated into the hosting organisations' team and identified with their tasks more.

Paradoxically, these two completely different attitudes have one thing in common: in both the volunteer is the most important point of the international volunteering project, although for different reasons. The organisations characterised by the “guest syndrome” want the volunteer to feel good and comfortable, whereas the other organisations want the volunteer to learn as much as possible.

### → **Factors that helped volunteers to integrate into the community**

Common activities and experiences, friendly relationships with youth, the role of leaders and ex-volunteers as well as volunteers' willingness to communicate are the main factors that encourage volunteer integration into the community and the life of an organisation.

The research data has shown that personal features of the volunteers are very important while thinking of their integration. Those foreign volunteers who were communicative, willing to understand and adapt were generally more satisfied with their projects and felt well integrated into the local community and the hosting organisation. Furthermore, those volunteers who established good relationships with young people claimed that young people were like the doors to the broader community.

After volunteers got to know some of the local people (mostly youth) with their help they began to befriend other representatives of the local community. A snowball effect could be observed – volunteers, with time, gained more and more local contacts, not necessarily related to their work at the hosting organisation. Moreover, common activities with local people helped volunteers to feel like locals. This means that common experience is crucial to acquire a sense of belonging. One more important factor that helped volunteers to integrate was the role of the head of organisation and that of ex-volunteers. The head of the hosting organisation is like a role model for other workers, showing them how to help volunteers to feel welcome and integrated. Ex-volunteers (if present at the hosting organisation) can play a crucial role in a volunteer's adaptation process and are credible mentors should a crisis in the volunteer's motivation occur.

# The Index of Higher Education–Business Engagement as a mechanism for monitoring university–business relations

## – pragmatic research grounds and methodological approach

By Paweł Poszytek, PhD, Magdalena Jelonek, PhD and Mateusz Jeżowski

### Abstract

In a world driven by innovation the cooperation between academia and business is a prerequisite to sustainable economic growth, employment and prosperity. Even though the examples of university–business cooperation can be easily identified, the phenomenon and its complexity has not yet been fully described and analysed.

The Index of Higher Education–Business Engagement (HEBE Index), based on a set of precise indicators, constitutes a framework for a comparative analysis which can provide a detailed picture showing to what extent individual universities in different countries cooperate with industry and business. As a tool for monitoring the level of adherence of national policies and practices to European and globally accepted and acknowledged recommendations and solutions, the index seeks to capture the attention of leaders in government and can be used as a benchmarking tool for universities and business.

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### Introduction and research rationale

Knowledge-based economies are highly dependent on the production, distribution and use of knowledge and information, which build and shape the fundamentals of the contemporary, globalised world. In consequence, universities more than ever before carry out key functions in (knowledge-based) economy, including knowledge production, transmission and transfer. Also more than ever before universities worldwide are asked and expected to be “useful” to the degree that it seems that the

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### KEYWORDS

UNIVERSITY–BUSINESS COOPERATION, INNOVATIONS, KNOWLEDGE-BASED ECONOMY, HIGHER EDUCATION, INDEX, RESEARCH, INDICATOR.



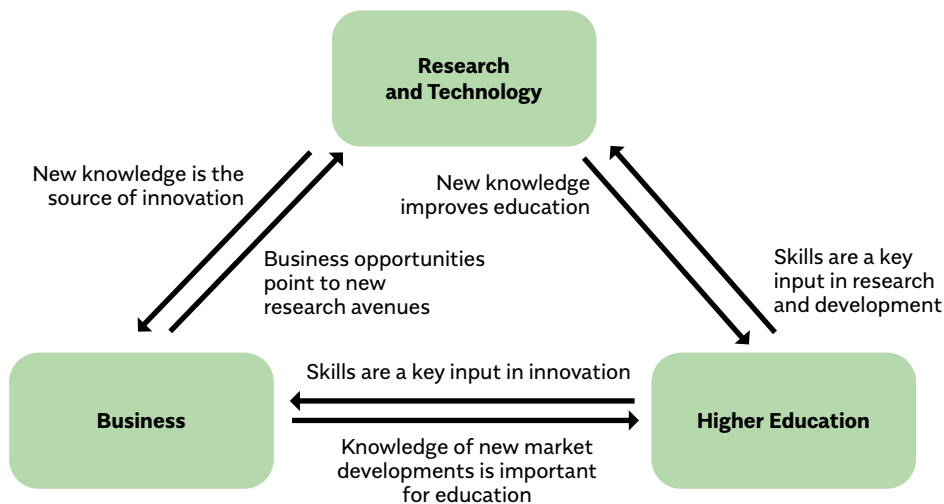
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implicit contract between universities and society is being rewritten<sup>1</sup>. Hence, universities are progressively perceived not only as a source of knowledgeable students and graduates or profitable ideas but also as direct contributors to economic development, for example through the establishment of spin-off and spin-out companies or the exploitation of technology licensing agreements<sup>2</sup>.

Taking into consideration the above, the question of university–business cooperation and relations is nowadays on the agenda of both governments and international organisations. The European Union also acknowledges the importance of the issue. In line with recommendations from The Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions regarding activities aimed at supporting economic growth and employment, in order to ensure stable, sustainable growth in a knowledge-based economy it is crucial to fulfil the aims of the “knowledge triangle” – to link higher education, scientific research and business<sup>3</sup>. The interactions between higher education, business and research within this knowledge triangle are illustrated in the figure below:

Figure 1: The knowledge triangle<sup>4</sup>.



<sup>1</sup> Metcalfe, J.S. (2009). University and business relations: connecting the knowledge economy. Working Paper No 395. Cambridge: Centre for Business research, University of Cambridge.

<sup>2</sup> Ibid.

<sup>3</sup> Council Conclusions on the Knowledge Triangle – 20 October 2009. Quote after: Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions; Supporting growth and jobs – an agenda for the modernisation of Europe’s higher education systems.

<sup>4</sup> Source: Catalysing Innovation in the Knowledge Triangle. Practices from the EIT Knowledge and innovation Communities. Budapest: European Institute of Innovation and Technology, 2012.

The Communication also states that the contribution of higher education to the creation of new jobs and boosting economic growth as well as the international attractiveness of education can be enhanced by the close and effective linking of education, research and business – the three vertices of the “knowledge triangle”. Moreover, recent emphasis on open innovation has resulted in increased knowledge flow and has contributed to the emergence of new types of collaboration between educational institutions, research organisations and businesses. The European Commission concludes, however, that the capacity of higher education institutions to effectively integrate research results and innovative practices into their educational offer, and to exploit the potential for marketable products and services, remains weak<sup>5</sup>.

The Communication also identifies four key policy issues for Member States and higher education institutions, namely:

- stimulating the development of entrepreneurial, creative and innovation skills in all disciplines and across all three education cycles, and promoting innovation in higher education by enhancing the interactivity of the environment and improving the knowledge transfer infrastructure;
- improving the knowledge transfer infrastructure of higher education institutions and increasing their capacity to engage in start-ups and spin-offs;
- encouraging partnership and cooperation with business as a core activity of higher education institutions through a reward system, incentives for multidisciplinary and cross-organisational cooperation, and through the reduction of regulatory and administrative barriers to partnerships between institutions and other public and private actors;
- promoting the systematic involvement of higher education institutions in the creation of integrated local and regional development plans and focusing regional support on the cooperation between higher education and business, with a view to creating regional centres of excellence and specialisation.

In order to support the creation of links and ties between higher education and business the European Union has set up a number of initiatives, one of them being Knowledge Alliances within the Erasmus+ programme. Knowledge Alliances are transnational and result-driven partnerships between higher education institutions and companies which can work together on projects that promote creativity, innovation and entrepreneurship by developing new multidisciplinary approaches to teaching and learning across all subject areas.

This paper aims at presenting the rationale and methodology of the Higher Education–Business Engagement Index (the HEBE Index), built upon and developing further the already existing monitoring systems. The authors put forward the proposed set of indicators and areas of university–business interactions and explore challenging issues regarding validity of the research and difficulties with the creation of complex indices.

<sup>5</sup> Council Conclusions on the Knowledge Triangle – 20 October 2009. Quote after: Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions; Supporting growth and jobs – an agenda for the modernisation of Europe’s higher education systems.



## University–business cooperation – the road so far

The phenomenon of university–business cooperation has been tackled and several monitoring systems have been established. A literature review provides several examples of typologies of areas in which business and education cooperate. The typologies that have proven to be the broadest, the most universal and, therefore, particularly useful to the authors in the constructing of the model of the Higher Education–Business Engagement Index are presented in Figure 2.

Figure 2: Typologies of areas of science–business cooperation<sup>9</sup>.

Typology	Areas of cooperation identified
<b>M. SANTORO'S<sup>6</sup> TYPOLOGY</b>	<ul style="list-style-type: none"> <li>→ University research supported by industry (grants, donations, scholarships, donations in kind, etc.);</li> <li>→ Joint research (consultations, research contracting, etc.);</li> <li>→ Knowledge transfer (personnel exchange, formal and informal interactions, co-design of study programmes, co-authorship of publications, personnel recruitment through universities, university and business consortia, etc.);</li> <li>→ Technology transfer (licences and patents).</li> </ul>
<b>W. POLT'S<sup>7</sup> TYPOLOGY</b>	<ul style="list-style-type: none"> <li>→ Research collaboration;</li> <li>→ Research contracting and technological consultancy;</li> <li>→ Personnel mobility;</li> <li>→ Collaboration on the education of students;</li> <li>→ Vocational training contracted by industry;</li> <li>→ Selling/bestowing intellectual property rights;</li> <li>→ Spin-offs;</li> <li>→ Informal contacts and networking.</li> </ul>
<b>EUROPEAN CLASSIFICATION<sup>8</sup></b>	<ul style="list-style-type: none"> <li>→ R&amp;D collaboration;</li> <li>→ Personnel mobility;</li> <li>→ Student mobility;</li> <li>→ Commercialisation of R&amp;D results;</li> <li>→ Improved educational offer and provision of educational services;</li> <li>→ Lifelong learning (LLL);</li> <li>→ Entrepreneurship;</li> <li>→ Joint control.</li> </ul>

<sup>6</sup> Santoro, M. (2000). Success breeds success: the linkage between relationship intensity and tangible outcomes in industry–university collaborative ventures. *The Journal of High Technology Management Research*, Vol. 11, No. 2, 255–273.

<sup>7</sup> Polt, W., Rammer, C., Gassler, H., Schibany, A., & Scharfing, D. (2001). Benchmarking Industry–Science Relations: The Role of Framework Conditions. *Science and Public Policy*, Vol. 28, No. 4, 247–258.

<sup>8</sup> Davey, T. et al. (2013). *The State of University–Business Cooperation in Poland*. Science-to-Business Marketing Research Centre.

<sup>9</sup> Jelonek, M., Strycharz, J., Strzebońska, A., Szczucka, A., & Jeżowski, M. (2017). *Ekspertyza dotycząca przeglądu wskaźników współpracy nauka–biznes*. Krakow.

According to the report “The State of University–Business Cooperation in Europe” (referred to as the “European classification” in Figure 2), prepared by the Science-to-Business Marketing Research Centre and commissioned by the European Commission, the cooperation between universities and business circles in the European Union is developing, but still remains at a relatively low level<sup>10</sup>. Most of the academic community is involved in a small share of the work with businesses, and higher education institutions are involved in such collaborations relatively rarely. About 40% of university employees who took part in “The State of University–Business Cooperation in Europe” study have “never” participated in joint ventures with companies, 20% “rarely” cooperate, but only 40% “sometimes” or “often” work with entrepreneurs. At the same time, as many as 92% of the respondents representing universities were to some extent involved in cooperation with the business environment at an institutional level.

Even though several systems monitoring university–business relations have been put in place, only one of them is ready to be fed with data and allows for international comparisons. The authors of the present paper therefore claim that there is still a need for creating a framework for a complex comparative analysis which can provide a detailed picture showing to what extent individual universities in different countries cooperate with business.

## The index of higher education–business engagement

Accordingly, the authors of the present paper propose to establish the Index of Higher Education–Business Engagement (HEBE Index)<sup>11</sup> to understand, describe and analyse the processes underlying the phenomenon of university–business cooperation. The HEBE Index described below will serve as a measuring tool to analyse the state of university–business cooperation in Poland, however, given its universal character, it will also allow for international comparisons.

The HEBE Index aims in particular to: (1) illustrate the current state of university–business relations and highlight good practice examples in order to enable informed policy choices, and (2) inspire a new policy focus among decision makers by demonstrating the importance of university–business cooperation in stable and prosperous societies<sup>12</sup>. Accordingly, on a more practical level the objectives of the HEBE Index are to ensure the following:

- better understanding of good practices of university–business cooperation, including the identification of drivers of and obstacles to university–business cooperation;
- enhanced cooperation and commitment to improving policies and practices;
- increased awareness of recommendations and how countries perform against them;
- creation of a sustainable benchmarking tool to evaluate policies and practices.

In brief, the construction of the HEBE Index reflects in some part the Knowledge Triangle described in the first section of the present paper. It primarily names and describes the key areas of university–business interactions (taking into consideration also the legal aspect of this cooperation as well as the

<sup>10</sup> The State of University–Business Cooperation in Europe, European Commission, 2011.

<sup>11</sup> Poszytek, P. (2016). Mierzenie zakresu i jakości współpracy pomiędzy uczelniami a biznesem [Measuring the scope and quality of university–business cooperation]. *Współpraca nauki z gospodarką i administracją dla rozwoju innowacyjności*, Vol. 3, No. 1, 37–47.

<sup>12</sup> Ibid.

influence of the decision makers on the process), attributing to each of the areas a set of concrete, performance-measuring indicators. The general model is represented in Figure 2 and the key areas of cooperation as well as examples of indicators for each of them in Figure 3 below.

Figure 3: The model of the Index of Higher Education–Business Engagement<sup>13</sup>.

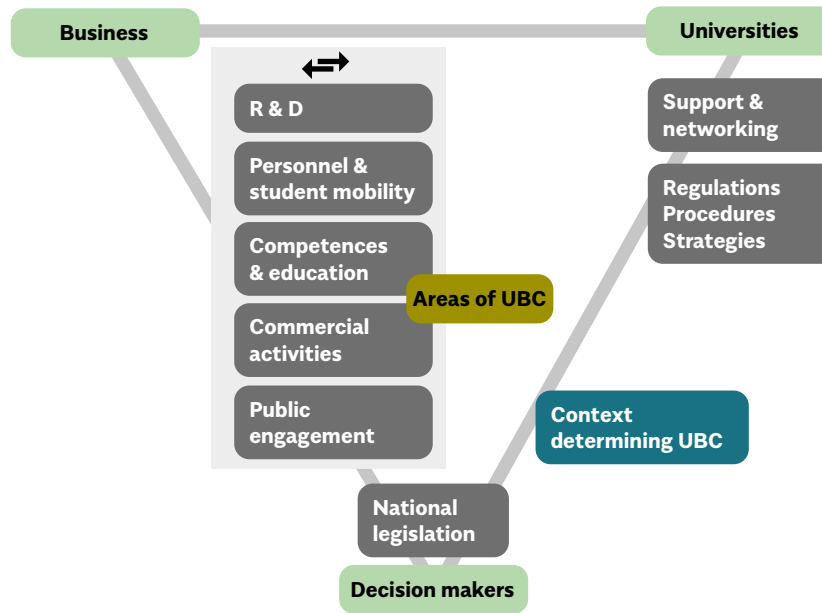


Figure 4: Examples of Indicators used in the Index of Higher Education–Business Engagement<sup>14</sup>.

<b>Joint R&amp;D</b>	R&D projects revenue Number of R&D contracts Number of staff dedicated to joint R&D activities
<b>Personnel mobility</b>	Number of university staff working for business Number of business staff working in academia
<b>Student mobility</b>	Number of students in job placements/internships Number of scholarships funded by business
<b>Competences &amp; education</b>	Number of students in joint study programmes Number of graduates who found employment in their field of study
<b>Commercial activities</b>	Number of licences and patents Number of spin-offs and start-ups and their revenue
<b>Public engagement</b>	Number of joint non-profit activities in the field of health, safety, environmental protection, sports, etc.

<sup>13</sup> Jelonek, M., Strycharz, J., Strzebońska, A., & Szczucka, A. (2017). Ekspertyza dotycząca katalogu wskaźników opisujących współpracę na linii nauka–biznes. Krakow.

<sup>14</sup> Ibid.

Challenging issues and quality assurance measures must be taken into consideration given the complexity of the HEBE Index. The composite indicators by their nature:

- can summarise complex or multidimensional issues in view of supporting decision makers;
- are easier to interpret than trying to find a trend in many separate indicators;
- facilitate the task of ranking countries on complex issues in a benchmarking exercise;
- can assess countries' progress on complex issues over time;
- reduce the size of a set of indicators or include more information within the existing size limit;
- place issues of country performance and progress at the centre of the policy arena;
- facilitate communication with the general public (i.e. citizens, media, etc.) and promote accountability<sup>15</sup>.

Despite these advantages, Nardo et al. also list several problematic issues connected with the use of composite indicators such as: risk of creating misleading policy messages and simplistic policy conclusions, disguising serious failings and leading to inappropriate policies, misuse and political influence<sup>16</sup>. In order to avoid these threats, Nardo et al. propose a set of measures to be considered while constructing indices to guarantee high quality and reliability of the research, namely: the theoretical framework chosen, data selection, multivariate analysis, missing data, normalization of data, weighting and aggregation, robustness and sensitivity, and links to other variables.

Consequently the HEBE Index is based upon a theoretically formulated construct – the design of the checklists referring to legislation, recommendations, documents, etc. as well as the formulation of questionnaires involved not only a team of researchers in the field but also policymakers and officials from the relevant countries and institutions.

As far as data selection is concerned, the following prerequisites underlie the construction of the HEBE Index: (1) the Index questions were designed to deliver rateable data for each domain; (2) rateable data will be weighted; (3) the Index is robust enough for repeated measurement over time in a longitudinal analysis. As far as missing data is concerned, the pilot phase (already in the implementation process) will show to what extent this factor is going to pose a problem to the validity of the research, however the authors are aware that providing data for over 180 indicators might pose problems.

Normalization of data is manifested by creating a country profile in the form of a spider graph. Although it allows for the ranking of countries, which is the simplest normalization technique, above all it enables us to see the distance of a given country from a common reference point provided by the monitoring systems and typologies presented in Figure 2. It also makes it possible to see the distance from the best score and from the average. Weighting and aggregation will be the subject of thorough analysis on the part of the panel of international experts involved. The final weighting procedure for individual answers for subsequent questions is going to be developed in the light of the experience from the pilot phase of the project.

As concerns robustness and sensitivity, individual indicators and parameters must undergo thorough scrutiny. For example, this means mapping all individual parameters onto the matrix of all possible formal documents, recommendations, white papers, etc. to check if all aspects of the phenomenon in question are represented and manifested in the questionnaire.

<sup>15</sup> Nardo, M. et al. (2005). Handbook on Constructing Composite Indicators: Methodology and User Guide. OECD Statistics Working Papers, Vol. 3. OECD Publishing.

<sup>16</sup> Ibid.

As mentioned above, the decisions on the visualization of the Index have been made taking into consideration political sensitiveness and the fact that some of the countries and organisations do not accept a ranking approach in showing the data. Yet efforts are being made so that the way the Index is visualised could foster international debate and exchange of good practices, which in practice imposes some form of ranking, and at the same time would be acceptable for those who do not want to be ranked. Accordingly, the mapping of individual countries' results onto each other for comparison will only be possible through specially developed engines and applications on the project webpage, which in turn would allow users to access relevant publically available information.

The possibility of decomposing the Index and going back to the detailed data does not pose a problem in the HEBE Index study. This is guaranteed by two main factors: (1) each domain consists of sub-components; (2) the analysis of country performance is extended by accompanying country essays/reports, which provide a contextual analysis.

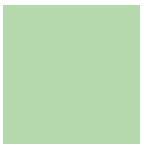
The primary recipients of the Index will be decision makers, higher education institutions' managerial and technology transfer staff as well as representatives of the business community understood in a very broad sense. The decision makers will gain a tool describing and analysing university–business relations which may in the long run inspire new policy solutions facilitating their cooperation. The representatives of higher education institutions will gain an analytical framework of the engagement of their university with the business community and will be able to compare their performance against other universities. Finally, the business community will gain a reliable and detailed description of their relations with academia, accompanied by a list of good practice examples.

It is worth mentioning that the feasibility of such an undertaking may be questioned due to its extremely high level of complexity and multidimensionality caused not only by the fact that different sorts of parameters are measured with the same tool but also by the fact that sometimes totally different national contexts have to be taken into consideration with the use of one standard model framework. This scepticism may also result from concerns that an indicator such as the HEBE Index comprises research areas of a different nature, which in consequence leads to different validity issues and the fact that the level of validity of the tool may differ from domain to domain. However, these are issues which permanently accompany constructions of composite indicators – that is their nature and their embedded characteristic. It must be noted that the level of validity of the research will grow even higher over its future cycles. Periodic repetition of the research and data collection as well as insights from national, European and global debates will help to refine and fine-tune the research tool.

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# Seminar programme

## Day 1 – October 25, 2017

**18:00**.....Ice-breaking meeting and dinner

## Day 2 – October 26, 2017

**8:30-9:00** .....Registration

**9:00-9:10**.....Welcome address by Paweł Poszytek, Director General, Foundation for the Development of the Education System (FRSE), Polish E+ National Agency

**9:10-9:40** .....Sebastien Combeaud, European Commission, DG Education and Culture Keynote speech  
Objectives, opportunities and limitations: the experience of the mid-term evaluation of Erasmus+.

**9:40-10:00**.....Introduction to the seminar Özgehan Şenyuva, Pool of European Youth Researchers of the Youth Partnership

**10:00-10:15** .....Coffee break

**10:15-11:25** .....Session 1 EMPLOYABILITY, ENTREPRENEURSHIP AND CAREER PATHS

Chair: Agnieszka Rybińska, FRSE, Polish E+ National Agency

→ Arnaud de Champris, Cabinet E.C.s., The national observatory of impact Erasmus+: what is common measurement of impact for multi-stakeholders mobility policies?

→ Sari Turunen-Zwinger, Finnish National Agency for Education (Finish E+ National Agency), New competences for SMEs – lowering companies' threshold for recruiting international talents.

→ Joanna Dąbrowska-Resiak, FRSE, Polish E+ National Agency, Tracer study of mobility participants: students in higher education – methodology and the results of pilot study.

→ Michał Pachocki, FRSE, Polish E+ National Agency, Impact of VET student mobility in Poland. Career paths of project participants.

**11:25-12:40** .....Group work/discussion

**12:40-14:00** .....Lunch

**14:00-15:10** .....Session 2 INSTITUTIONAL DEVELOPMENT

Chair: Michał Pachocki, FRSE, Polish E+ National Agency

→ Paulo Morgado, University of Lisbon, Mapping of higher education networks developed with Erasmus support.

→ Siru Korkala, Finnish National Agency for Education (Finish E+ National Agency), Exploring the institutional level effects of staff mobility in VET.

→ Kevin Robinson, Ecorys (UK E+ National Agency), Measuring impact: the role of the Impact+ Exercise in changing professional and organisational practice in measuring impact.

→ Magdalena Jelonek, Jagiellonian University, Mateusz Jeżowski, FRSE, Polish E+ National Agency, The index of higher education engagement with the business community.

**15:10-16:15** .....Group work/discussion

**16:45** .....Exploring Warsaw



**Day 3 – October 27, 2017****9:00-10:30** .....Session 3 TRANSNATIONAL COOPERATION

Chair: Joanna Dąbrowska-Resiak, FRSE, Polish E+ National Agency

1. Liutauras Ivoška, Education Exchanges Support Foundation (Lithuanian E+ National Agency), Transnational mobility of staff – impact on Lithuanian schools.
2. Michał Pachocki, FRSE, Polish E+ National Agency, Transnational mobility of staff – impact on Polish schools.
3. Lorenza Venturi, Indire (Italian E+ National Agency), Survey on the impact of the Erasmus+ programme – outcomes.
4. Nicolai Netz, German Centre for Higher Education Research and Science Studies, Determinants and career effects of studying abroad.
5. Alix de Saint-Albin, Pluricité, Impact minded European cooperation: education and training partnerships diversity analysed.

**10:30-10:45** .....Coffee break**10:45-11:30** .....Group work/discussion**11:30-12:40** .....Session 4 SOCIAL AND INTERCULTURAL DIMENSIONS OF LEARNING OUTCOMES

Chair: Mateusz Jeżowski, FRSE, Polish E+ National Agency

1. Helmut Fennes, Institute of Educational Science, University of Innsbruck, Research-based analysis and monitoring of the Erasmus+ Youth programme.
2. Irma Garam, Finnish National Agency for Education (Finish E+ National Agency), Global Mindedness Survey: Does international mobility change students' attitudes and the way students engage with difference?
3. Sandra Zaidova, Pool of Trainers of Lithuanian National Agency, The impact of European Voluntary Service on local communities in Poland, Lithuania and Hungary.
4. Marco Brüeckner, German Academic Exchange Service DAAD (German E+ National Agency), NA DAAD Study 2017/2018: Impact of Erasmus+ with regard to the Paris Declaration 2015.

**12:40-13:15** .....Group work/discussion**13:15-13:30** .....Closing remarks

Özgehan Şenyuva, Pool of European Youth Researchers of the Youth Partnership  
Tadeusz Wojciechowski, FRSE, Polish E+ National Agency

**13:30** .....Lunch

## Poster presentations

No	Poster title	Submitted by
1.	Evaluation of Scholarship and Training Fund Projects	Foundation for the Development of the Education System Polish National Agency of Erasmus+ Programme
2.	Competence development in European Voluntary Service projects with regard to skills needed on the labour market	Foundation for the Development of the Education System Polish National Agency of Erasmus+ Programme
3.	The Index of Higher Education Engagement with the Business Community	Foundation for the Development of the Education System Polish National Agency of Erasmus+ Programme
4.	Evaluation of the SCIEX Scholarship Fund in Poland	Foundation for the Development of the Education System Polish National Agency of Erasmus+ Programme
5.	Tracer study of mobility participants: students in higher education	Foundation for the Development of the Education System Polish National Agency of Erasmus+ Programme
6.	Survey of graduates: career paths of vocational mobility participants	Foundation for the Development of the Education System Polish National Agency of Erasmus+ Programme
7.	Mobility projects for school education staff – impact and sustainability	Foundation for the Development of the Education System Polish National Agency of Erasmus+ Programme
8.	Statystyki dotyczące Programów UE realizowanych przez FRSE	Foundation for the Development of the Education System Polish National Agency of Erasmus+ Programme
9.	Eurydice – sieć informacji o systemach edukacji w Europie	Foundation for the Development of the Education System Polish National Agency of Erasmus+ Programme
10.	New Competence for SMEs	Finnish National Agency for Education EDUFI (former CIMO)

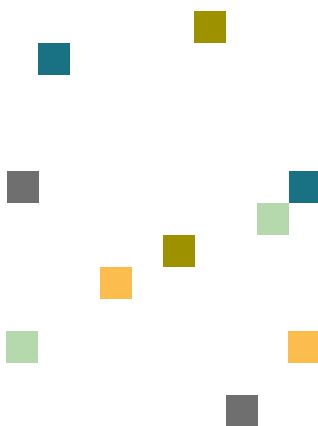


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