

Balancing Life in EUROPE

transnational evaluation report



Transnational Evaluation. Oct 2007
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Summary	3
TCA Balancing Life in Europe	4
Transnational partners	4
THREE PERSPECTIVES	4
Objectives	5
Products planned	5
REPORTS	5
WEBSITE	6
REPORTS TRANSNATIONAL COOPERATION AND EVALUATION	6
Evaluation	6
INDICATORS	6
Method	7
Working methods of the TCA	9
STEERING DOCUMENT FOR THE TCA	9
TRANSNATIONAL STEERING GROUP	10
STUDIES	10
MODELS	11
STUDY TRIPS	12
THEMATIC SEMINARS	13
INDIVIDUAL EXCHANGES	13
WEBSITE	13
EVALUATION	14
TOOLS THAT WERE NOT USED – BUT COULD HAVE BEEN	14
Transnational work in Balancing Life in Europe	15
List of appendices	16
1 Evaluation seminar Sept 27 2007	
2 Models – transnational discussion, report	
3 Monitoring plan	
4. Evaluation at transnational meetings – guidelines	
5 Questionnaires	



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Summary

TCA Balancing Life in Europe has been co-operating around the issue *balance between working life and family life 2005 - 2007*.

This report is an external evaluation of the transnational co-operation process. The purpose of this evaluation has been to take a learning perspective to the transnational processes. The evaluator has taken part in steering committee meetings, discussed the process with the national co-ordinators and arranged arenas for joint reflection.

- What can we learn from this transnational co-operation between partners from different parts of Europe, representing quite different national contexts of the issue addressed for joint work? What happened when partners from south Europe (Spain), central Europe (Czechia) and northern Europe (Sweden) discussed working life and family life – representing so different national cultural and societal aspects?
- This report also treats the very forms for co-operation. What methods did this TCA use? Were they fruitful? Can they be developed? What methods did this TCA not use, and why? Generally: what are the practical conditions for transnational co-operation within the Equal programme?

Equal programme has provided the three partners and their national DPs an arena for transnational exchange and joint development. The general conclusion of this report is that the Equal arena used in practice has structural limitations, which leads to that efforts and commitment of the project workers don't give optimal results. This TCA has reached important results; they have compared their realities and spread transnational experiences within their national networks. They have reached their product objectives (i.e. seminars, study trips, website, best practice models). The summative part of this evaluation confirms that the TCA efforts have provided the results that were addressed.

But the formative part of this evaluation describes how this committed TCA has met obstacles for co-operation within the social funds in their work (such as rigid economical frames, different national programme time schedules and demands, more time used for co-operation procedures than for co-operation objectives, language obstacles). These problems are not new. They have been pointed out regularly in DP evaluations, TCA evaluations and programme evaluations. These inbuilt obstacles affect the individual TCAs and DPs in negative ways, but cannot be solved at TCA level. It is this evaluator's opinion that most aspects of these obstacles could meet stronger support within the programme frames.

So, the learning from this TCA co-operation process would to a great extent be for programme planners: how can we improve practical conditions for transnational co-operation? In this report the evaluator points out areas for stronger programme support to transnational co-operation.

Malmö, Sweden, October 2007

Kicki Stridh, Internationell kompetens AB

TCA Balancing Life in Europe

Some facts and frames

This evaluation report focuses on the working process of TCA Balancing Life in Europe. The joint work is reported in the final report from the TCA, with descriptions of activities and of their outcomes.

To make the analyses of this report comprehensible, here are some short background facts about this TCA: the who and the what.

Transnational partners

The focus for co-operation in TCA Balancing Life in Europe (BLiE) has been balance between working life and family life.

The transnational co-operation of this TCA was formed by three national development partnerships, (DPs), representing regions in southern, central and northern Europe: Spain (Andalucia), Czechia (Vycosina) and Sweden (Värmland).

Spain

Concilia-LO: Experiencias de conciliación en lo local

Responsible: JUNTA DE ANDALUCÍA

DP Identification: ES-ES20040462

Czech Republic

Title: MOPPS

Responsible for MOPPS: Český svaz žen (Czech Women's Union]

Responsible for TCA/TNP: Český helsinský výbor (Czech Helsinki Committee)

DP Identification: CZ-67

Sweden

Title: VÄRMLANDS ARBETSLIVSFORUM

Responsible: Karlstads Universitet

DP Identification: SE-85

In the following the abbreviation BLiE will be used for the TCA cooperation, and partners often addressed as simply Spain, Czechia and Sweden.

Three perspectives

From the beginning, through the co-operation process and in the exchange totally, this TCA work has involved a constellation of most different perspectives to concepts and ideas around women's situation, women's working life and women's family life. Three different traditions from three different geographical areas¹:

1. Southern Europe, which is taking the first steps in the establishment of a social system which takes into consideration the situation of people

¹ Description of areas from Transnational co-operation document Balancing Life in Europe

(especially women) with problems to access the job market in equal conditions;

2. Scandinavia, with a long path of political and social involvement in this matter, translated into the public funding of resources for work/life balance, as well as a wide regulatory framework on the subject;
3. Central Europe - which contributes different realities and new ways of working in this matter, related to the settled participation of women in employment and production fields.

Objectives

The common objectives for the three DPs²:

The TNP will thus establish a working partnership of varied institutions (NGOs, municipalities, academic and research institutions, employers, associations ...) with the common aim to:

- exchange and share experiences and best practice
- analyse and challenge current practices
- promote learning and innovation
- raise the awareness of the decision makers about the issue of work/life balance.
- empower people to improve their own lives.

The benefits will be for both women and men alike through finding innovative and flexible forms of employment, support and counselling.

We will work together with municipalities, local agents, employers, policy makers and public opinion makers to create a better living and working situation for all those experiencing disadvantage in order to promote diversity.

Products planned

The plans for TCA listed products that were foreseen to come out of the joint work³:

Reports

Reports and guides resulting from the “Studies” activity. These reports will be about three thematic areas of study:

- Family oriented services.
- Models of “empowerment” (the process of training people to be aware of their own circumstances and make use of the structures and devices that can help them to improve their lives).
- Citizen’s participation mechanisms in favour of work/life balance.

These reports will be published in English as well as in the national languages of the three DPs.

² Objectives from Transnational co-operation document Balancing Life in Europe

³ Description of results from Transnational co-operation document Balancing Life in Europe

Products resulting from both “Study trips” and “Thematic seminars”, in the form of reports which should include aspects such as general approach, working programme, lectures, related materials and conclusions synthesis.

Website

Transnational website: Apart from its operative role throughout the project, this website will lodge the products and results derived from the project, making easier their access and use by any person or institution interested. Besides that, a web-based platform to be used by the partners for internal management purposes, will be also provided.

Reports Transnational cooperation and Evaluation

Transnational cooperation report: It will include a brief description of the working strategy adopted by the associated DPs, an assessment of the experience as well as a presentation of the different results and products originated in the transnational project, permitting to place them in an adequate strategic, territorial and conceptual context.

Evaluation report: The external evaluation aims at constantly improving the quality of the transnational work by giving a continuous feed-back to the three DPs. A final summary report with results from the evaluation and future recommendations will also be produced.

Evaluation

The transnational evaluation of Equal TCA *Balancing Life in Europe* was designed as a formative process evaluation to also contain a summative evaluation. That is evaluation as a support to project improvement and learning. “Formative” indicates that the purpose of the evaluation is to improve the process; its counterpart would be “summative” evaluation.

- The *summative* aspect treats how well the objectives have been reached.
- The *formative* aspect has been aimed supporting the process, implementing structured continuous evaluation, and feedback to the TCA partners.

The main focus has been on formative evaluation aiming at support for the transnational partnership to continuously improve the quality of the project. The main interest lies in illuminating how the co-operation and networking is developing in the transnational work and the regional working groups. This focus is described in the Guidelines for Equal as:

“A periodic assessment of the relevance, performance, efficiency and impact of a project in the context of stated objectives. It is undertaken as an independent objective examination, with a view to drawing lessons that may be more widely applicable.”⁴

Indicators

The Equal programme identifies the areas that shall be evaluated:

⁴ EQUAL, Partnership Development Toolkit, European Commission, Sept 2005

- **Relevance** – did the objectives deal with the problems that were supposed to be addressed, and were they appropriate to the physical and policy environment within which the TCA operated?
- **Effectiveness** – did the project planning and logic work, was the design feasible and did the DP have sufficient capabilities to manage the innovative initiative? Did activities achieve outputs and did outputs achieve TCA Result? Did the project contribute to the expected Impact or are there good indications that it will? Did the TCA succeed in learning lessons from action?
- **Sustainability** – did the application of the learning by mainstream organisations happen and did this result in a flow of benefits to the disadvantaged?
- **Efficiency** – did the TCA provide the units at the budgeted cost and how does this compare with similar DPs?
- **Management, Appraisal and Monitoring** – through the audit trail of the project documents the evaluation should try to assess the level of appropriateness of the organisation and management of the TCA.

The role of the external evaluator has been to design and implement a model for evaluation and to support structured reflections among the project stakeholders in the transnational partnership. The task for the external evaluator has been to add expertise to enhance the project processes towards objective fulfilment.

This is a task that is separated from the different national DP evaluations, and also from the TCA's own process description.

Method

Generally, the evaluator has supported the partnership to establish relevant indicators for quantitative and qualitative evaluation, and has developed suitable methods for TCA's self-evaluation: models and checklists.

Indicators to follow the project processes have been produced, covering different aspects of objective fulfilments; financial, physical output, outcome and impact⁵.

This material has been systemised and reflected upon by the partners, and these analyses have provided sources for the external evaluation report. The evaluator has gathered information to provide material for the steering group for its analyses of the malfunctions, difficulties and deviations with regards to the initial working plan (contents, deadlines, budget, results, etc.), proposing, in every case, the measures to correct them and the most suitable improvements.

The transnational meetings of the steering committee have constituted a central part of the evaluation. Checklists for a structured evaluation have been introduced as a basis for supervised reflections during the meetings. These reflections were supposed to initiate changes in the project action, on the basis of experiences within the project. The analyses can lead to new learning, as tacit knowledge become explicit, as well as to idea development.

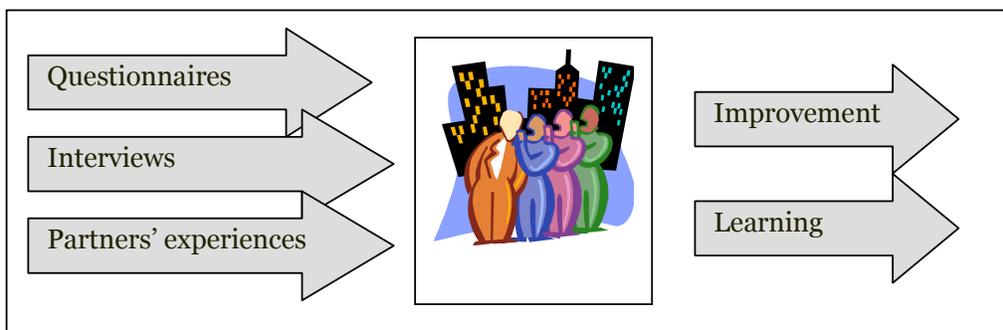
The continuous internal evaluation has been carried out in the form of self-assessment, aiming at constantly improving the quality of the project,

⁵ Documentation, see appendix Evaluation at transnational meetings – guidelines

illuminating how the co-operation and networking is developing in the transnational work and in the national working groups.

The evaluator has been gathering information from different methods:

- participation in project activities
- contact with the national evaluators and co-ordinators
- studies of project documents
- web based questionnaires
- interviews



The external evaluator designs, gathers and structures material

The steering committee reflects and evaluates

The aim is project improvement and learning

Participation in TCA meetings

The external evaluator has participated in selected activities within the project transnational framework; steering committee proceedings, thematic conferences and study trips in order to evaluate the progress and results of the project. At these meetings the evaluator has contributed with structured reports based upon the gathered input so far.

Contact with the national evaluators and co-ordinators

The evaluator has had continuous contacts with key persons of the TCA. These contacts aim at getting an overview of the project processes, as seen from those key-actors position.

Studies of project documents

One of the most important sources for the evaluator has been the continuous documentation of the project activities. The TCA documentation has been the main source for following up of how the activities are carried out.

Web based questionnaires

The evaluator has developed standardised questionnaires distributed by email to participants of the meetings, study trips and seminars⁶. The national co-ordinators have been responsible for producing participant lists with email addresses and to send them to the evaluator immediately after each such activity. The questionnaire answers have been structured to reports. The material with evaluator's comments has been sent out to the steering committee and has been presented at SC meetings.

⁶ See appendices for *Overview of questionnaire*

Interviews

To get a deeper understanding of identified interesting areas of the project processes, the evaluator has interviewed persons involved in the project activities. The national model contribution has in this way been commented upon by representatives for the other two national projects.

Evaluation of the models developed

Within the TCA Balancing Life in Europe, the end result has been models developed on the basis of experiences from the national partners. The evaluation has mirrored the criteria for modelisation, scheduled from Equal programme objectives, criteria inbuilt in the project process:

- Experiences being developed currently
- Complementarity (added value)
- Empowerment (active participation of beneficiaries)
- Innovation (new ideas and approaches)
- Equal opportunities (gender perspective and equal opportunities for vulnerable groups)
- Integrated approach and concentration (use of existent resources and effect on the discrimination situations and target groups)
- Transference (to general policies and other contexts)

These aspects have been built into the modelisation process, and have been an issue for dialogues in the TCA.

Reflections on the models

The process of developing best practice models was maintained through the transnational secretariat. Each of the national partners gathered material, experiences that were modelised to a form developed within the TCA. The processes were made through a method where models were chosen and formed step by step by the TCA.

In this process the evaluator has taken an active part by supporting a dialogue on the extent of local and situational characteristics of the models⁷. This aspect upon modelisation was brought up within the TCA at the first steering committee meeting. The task for the evaluator has been to gather the views from the partners upon the models produced, “comments” to the models.

Working methods of the TCA

This part of the report goes through the working methods of the TCA and comments upon them, taking departure from the process evaluation.

Steering document for the TCA

The steering committee started up with a *steering document* for the TCA, to enable an overview of managing and responsibility in this joint work. This document has been changed during the process in respect to time-schedule – the process has sometimes taken longer to fulfil.

The responsibility was divided between partners. Spain took on responsibility for co-ordination, information, communication, documentation and for designing a joint logotype. Czechia took on responsibility for the website,

⁷ Documentation, see appendix *Models, transnational discussion*

including information on activities and dissemination. Sweden took on responsibility for process evaluation and self-assessment.

The transnational language was decided upon: English.

- Partners have been satisfied with this work division.
- Even though a joint working language was decided upon in the partnership, there have been obstacles, as lacking language skills in the partner organisations have occurred in respect to all the responsibilities above. That means that some material was produced in the national language (ex models), the building up of Czechia's website was difficult to follow, and part of evaluation methods (web questionnaire) were unsuitable.

Transnational steering group

The TCA was formed by the three national partners, and there has been six meetings spread evenly during the project period: September 2005, February 2006, May 2006, October 2006, May 2007 and September 2007.

- The working climate in this group has been good and constructive.
- The multicultural dialogue has been one of the most rewarding single factors as the partners see it. There has been many comments on that this dialogue has been a learning dialogue, providing reflections on the joint work.

The work has been fruitful, but there are some points to be made on this multicultural work situation:

- The multicultural dialogue has the inbuilt problems of language. At most meetings at least one of the persons did not master the common co-operation language. This is a common condition in transnational co-operations, and it can be stressed that TCAs could consider how to deal with this problem.
- There has been communication within the steering group at the steering committee meetings, but also between meetings – then mostly on email distributed to all persons in the steering group. The great extent of mails has been commented upon as negative and also other aspects of internal communication (which is further elaborated on in discussion headline).
- When different organisational cultures meet for joint work, there are differences in how to proceed in practice. The main content of steering committee meetings was allocated to information and procedures, and less to open dialogues around the work objectives and work results. Form above content.

Studies

Three areas of study were established, and were co-ordinated by the three partners, each one issue. Czechia studied *Services for the family*, Sweden *Models of empowerment* and Spain *Citizens' participation in favour of work/family balance*. The transnational secretary (Spain) co-ordinated the whole process. The aim of the studies was to identify and analyse innovative experiences in the field of work/family balance, implemented in the three regions.

The areas were linked to modelisation of best practises, where each partner took on responsibility for the modelisation in “their” field.

- This model worked out well, and one success factor was that each country choose an expert (from the DP) to carry out this work.

Models

The result of this TCA aimed for and achieved was identification of best practices within the three target areas (Service for families, Citizens’ participation, Empowerment), distributed between the partners. The procedure of identifying, writing up, choosing and disseminate modelised best practises was more complicated that it looked at first.

- All partners wrote up cases/models, but to the background of the different understandings of the function of the models, there is not a common ground for each country’s choice of best practices.
- Generally, the underlying assumptions, objectives and logic of models was not discussed at a deeper level in the TCA. This led to several confusions, and a heavier work than first estimated. The time schedule was too narrow, and the elaborated scheme for modelisation was adapted and simplified during the process.
- “Innovation” and “innovative elements” was not discussed at a deeper level. This resulted in one partner writing about models developed in this Equal DP work, and another partner writing about models that were developed earlier – models where the innovative content had shown itself as sustainable.
- Another obstacle was the timing of the modelisation process. The national DPs and their development work had different time schedules, which resulted in that comparison and experience exchange around the national work was difficult.

Dialogue on national contexts

When the transnational secretary introduced the outlines for modelisation in the steering committee, there was a discussion in the TCA upon the idea of cleaning a best practice from the context content to make models that were supposed to be generalised. Departing from this discussion the evaluator took an active part in modelisation by supporting a dialogue on the context around the models, an arena to discuss the extent of local and situational characteristics of the models chosen. The task for the evaluator has been to gather the views from the partners upon the models produced, “comments” to the models.

- To what content are those models dependable upon the local/circumstantial conditions?
- How does the context (national, societal, cultural ...) influence the different models?

Are those models transferable in a realistic sense to other contexts? If so, what in the models is transferable?⁸

Generally, it would have been very interesting to have had much more time to structured reflections upon the models, their design and their content. Most of the national activities on balancing life were for example directed to women (a

⁸ Documentation, see appendix *Models, transnational discussion*

couple of the Swedish were also targeting men, though). This is an interesting fact that could have been discussed from the view of different national traditions and systems, and of the issue of balancing in itself – an issue for women, for families, for men, for organisations and society – or all of them?

There are several other aspects within the models from three different European areas that would be rewarding to go deeper into. The TCA has fulfilled the objectives of gathering the models, and still, it feels a bit unsatisfying just to leave those keystones to understanding behind.

Study trips

Three study trips were carried out, one per country. Each partner organised a study trip in their country in which the rest of partners takes part. The topics of these visits were agreed upon in the Steering Committee, and each partner carried out the planning.

The idea of study trips has been to make it possible to involve more participants to the transnational exchange, and partners took the opportunity to gather participants for travels abroad and as a hosting partner to demonstrate project activities and involving partner organisations.

- The value of exchange on a grass-root level has also been much appreciated by all people involved. The negative comments are mainly on too little time provided for visits. The opportunity to learn from other approaches and gather new experiences has been appreciated by participants. This moment has improved new knowledge, both to visitors and visited.
- The planning of study visits is complicated. On one hand national co-ordinators report that it has been difficult to recruit visitors from the national DP partner organisations. On the other hand, there has been limitations that made it impossible to receive visitors to the extent of wishes.
- A big obstacle has been in the different budgets for travels, and for different national policies on planning/budgeting/accounting. When the co-ordinators have been obliged to make all the planning in advance to a rigid schedule, there has been little opportunities to be flexible and let the process and joint learning make changes into the travel schedule.
- The economy around study visits is also obstructed by the heavy surrounding costs: transportation and accommodation are normally both difficult to plan and to realise.
- The transnational setting embeds another problem: visitors and visited often have communication problems, as they don't share a common language. This has been another issue mentioned in the evaluations: "there was too little time to discuss, and there were no translation". Some of these difficulties could be overcome by translation, but budgets in this TCA has not made such arrangements possible.
- Generally, one learning issue is that the study visits could give more value with better preparation. Both visitors and visited could be better prepared before the visits.

Thematic seminars

Activities in this project open to the public has been thematic seminars, arranged in all countries. The topics for the thematic seminars have been around the three issues Services to the family, Empowerment and Citizens' participation.

- The thematic seminars have taken departure from the dissemination forms of the academical society. The agenda has been speakers, and the involvement of "policy speeches" have been high. This could be of value, as some have pointed out in evaluations: the seminars have had the function of internal marketing of the DP work nationally/regionally/locally. The form is a recognised one for exchange of experience and knowledge.
- The general problems with this form, also in this case, is that it can be felt less comfortable for practitioners. And of course: the language problem, with the need for translations.

Individual exchanges

As an added value, not within the original design of the agenda, there has been exchange on an individual level. Contacts with people and organisations have been built up in the joint work, which fact has provided opportunities for individuals to design their own exchange of experiences with colleagues abroad.

In this case there has been an interest in linking further on topics like building and organising production and consumers co-operatives, women's resource centra, equal opportunity work and network for men. All these links were made at the transnational seminars and study visits.

- The individual exchanges have been an interesting development from the transnational activities, practical and rewarding for individuals and organisations. Not least interesting is that those connections and networkings could well be long-lasting liaisons, and can be the basis for future co-operation around specific issues.
- The problems in this case is mainly that as this development is an added value, it can be difficult to perform these kind of individual exchanges. They are not in the original budget. This is also an example of how budgets could gain by providing possibilities for flexibility and changes along the process.

Website

A concrete result of the TCA work is the web site for the dissemination of the project results and outputs and its activities: www.balancinglife.eu

Decisions on the context, structure, aesthetics and contents of the website were agreed upon by the three partners in the first Steering Committee meeting. The coordination of building up, maintaining and updating the website has been the responsibility for the Czech partner. For internal management purposes, the Czech DP also should have provided a web-based platform to be used for the partners communication.

- The building and construction of the web-site took longer time than counted for in the original plans. Now, as the project ends, there are still content issues to be recognised.

- The platform for communication has not functioned.
- These web-site problems are common for transnational partnership: when the site is built, the programme period ends. There is also the problem with project funded web-sites what happens when funding stops: who shall be responsible for hosting and updating. In this case the Czech partner has taken on these tasks.
- General comments on IT-technology for dissemination and communication could be that this could clearly be a field for programme support. What if the Equal programme built and implemented web-site formats to the TCAs? It is, after all, possible to make a general construction to start with, and for the TCAs to adapt and design further as the work goes on. If the TCA has a functioning web-site with communication tools inbuilt from the beginning, it would save a lot of efforts – in my opinion (and experience).

Evaluation

The Swedish DP was responsible for the coordination of external evaluation, understood as a process of control and monitoring of the project and its activities, and took on an expert to perform the conduct of this moment. The content of this work is described in other places in this report, and here could be added that the original plans were completed with seminars organised by the evaluator to reflect on the models as means for transnational learning.

- The transparent organising and documentation by the DP partners and the transnational secretary have supported the monitoring and following-up of the transnational activities. There has been no problems in following the development work of this TCA.
- The general problem concerning the external evaluation has been to launch working methods for process evaluation, where systematic and continuous reflections by the stakeholders, mainly the steering committee, are important and necessary ingredients. The steering committee meetings have provided little room for such reflections, which means that external support to deeper understanding and developing of the common objectives have not been as deep as could be wished for. So there has been a need for developing other and completing situations for joint reflections.
- One of the specific methods used, was clearly not adapted to the needs of this TCA: the web-based questionnaires used by the evaluator was difficult to handle. It was developed as a three-language tool (English, Spanish, Czech), but it was not an optimal method to gather information as the answers also had to be translated.
- The main value added by external evaluation as a support to the TCA work has been the room for further reflections on the models.

Tools that were not used – but could have been

This discussion aims at adding to the headlines before by asking the question of what possible methods that were not used. What methods – or adaptations/changes of methods used – did this TCA not use? Are there other methods that could be considered in future transnational work?

- Methods such as **LFA – Logical Framework Approach**⁹ applied at the start of the work. Planning the work by methods that take departure from the abstract transnational objectives, and provide goals and operational parameters enhance practical co-operation work, learning and development of knowledge.
- **Dialogue seminars on exchange and cultural communication.** This TCA has used quite little time for structured learning sessions around transnational perspectives and learning. Sessions that provide possibilities for diverse exchange, dialogues that can take their time, thoughts that could be formulated and reflected upon – that kind of activities should be rewarding in several aspects of transnational work.
- **General knowledge input** on social systems in regions/nations. Transnational learning can be richer and deeper by adding context to seminar, visits and other exchange activities. These also gain by extended time for reflection and discussion. It is often better to concentrate on one model/visit etc, than to grasp for quantity – the cost of quantity is superficiality.
- **IT-tools for communication.** This TCA planned for communication on the website, which was not achieved, but would have provided easier exchange. There are communication tools (Skype, msn) for exchange during work that were not used, but could be of value. Those tools would be implemented at start to be of full value.

Transnational work in Balancing Life in Europe

TCA Balancing Life in Europe has resulted in

- Maintaining of knowledge and experiences in the field of working life and family life.
- Analyses of knowledge and experiences, in theory and practice, developed in three countries around this issue
- Testing and experimenting on different approaches to activities that aims at developing a better balance between working life and family life
- Experiences of obstacles and possibilities in transnational co-operation

and

- Analyses of obstacles, success factors, resources and development needs to achieve better balance of working life and family life
- A basis for further development of theory and practical approaches to balance between working life and family life

⁹ Management tool described for example in Wikipedia:
http://en.wikipedia.org/wiki/Logical_framework_approach

List of appendices

1 Evaluation seminar Sept 27 2007

2 Models – transnational discussion, report

3 Monitoring plan

4. Evaluation at transnational meetings – guidelines

5 Questionnaires

Overview questions

Karlstad Sept 07

Seville May 07

Chechia March 07

Karlstad May 06

Seville Feb 06