SALTO

INCLUSION EDUCATION



IDEA 2.0:
Inclusion and
Diversity in
Erasmus+
Assessments
for KA2
Partnerships

A RESOURCE FOR ERASMUS+ ASSESSORS ON HOW TO RECOGNISE AND REWARD ORGANISATIONS THAT CONVINCINGLY ADDRESS INCLUSION AND DIVERSITY IN THEIR KA2 PARTNERSHIP PROPOSALS AND FINAL REPORTS

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SALTO INCLUSION EDUCATION

AGENCY FOR MOBILITY AND EU PROGRAMMES

Erasmus+
Enriching lives, opening minds.

EUROPEAN UNION



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1 PURPOSE AND FOCUS

This resource has been developed by SALTO Inclusion and Diversity (Education and Training) for experts undertaking the assessment of funding proposals and reports for selected Erasmus+ Key Action 2 (KA2) partnerships in the fields of **Adult Education, Higher Education, School Education** and **Vocational Education and Training**.

Throughout this resource, we use the term assessors to refer to internal and external experts involved in assessing Erasmus+ funding proposals and reports. The purpose of this resource is to help you, as an assessor, to recognise and reward organisations which effectively address inclusion and diversity in Small-Scale Partnerships, Cooperation Partnerships and European Partnerships for School Development.

In this resource, we consider the key principles of inclusion and diversity, building on information and guidance presented in the Erasmus+ Programme Guide, the **Guide for Experts on Quality Assessment,** the **Handbook on the Lump Sum Funding Model** [1] and the Implementation Guidelines: Erasmus+ and European Solidarity Corps Inclusion and Diversity Strategy (hereafter, **Strategy**). Input on assessment steps and processes was secured through collaboration and exchange with the CLEAR+ LTA, which targets the levelling-up of assessors and the development of common information and training resources.

Throughout the resource, we will ask questions and provide opportunities for reflection so that you can confirm your knowledge and understanding of the topic.



1 | The **Guide for Experts on Quality Assessment** and the **Handbook on the Lump Sum Funding Model** are released alongside specific Calls for Proposals.

2 UNDERSTANDING INCLUSION AND DIVERSITY

Inclusion and diversity are at the heart of Erasmus+, confirmed as one of four horizontal priorities for the 2021-2027 programme period, yet the programme also uses different terms or descriptors (e.g., equity and inclusion; social inclusion and integration).

The **Erasmus+ Programme Guide** confirms the programme's intention to promote equal opportunities and access, inclusion, diversity, and fairness across all its actions. It underlines the need for organisations to adopt an inclusive approach in designing their projects and activities, ensuring they are accessible to a diverse range of participants.

An accompanying Framework on Inclusion Measures (hereafter **Framework**) confirms the principle that Erasmus+ is accessible to all, leaving no one behind, regardless of the barriers faced, and contributing to more inclusive societies. The **Framework** lists four specific objectives, which centre on:

a. mainstreaming inclusion and diversity as a cross-cutting priority and guiding principle;

b. ensuring the offer of inclusive features and mechanisms within the Erasmus+ programme design and budget and ensuring a focus on inclusion and diversity at all stages of programme management;

c. establishing a common understanding of those who may be considered as persons with fewer opportunities and fostering a positive approach to diversity;

d. supporting beneficiary organisations in establishing more high-quality projects that address inclusion and diversity, and in designing and implementing projects in a more inclusive and diverse manner.

A dedicated **Strategy** underlines the importance of inclusion and diversity in bringing programmes within reach of people with fewer opportunities. The **Strategy** highlights the fact that societies are increasingly diverse in many respects - including cultures, abilities, social groups, sexualities, political opinions, identities and education, training and literacy levels - the result of which is a need to learn to navigate diversity and to create inclusive and cohesive societal systems and educational opportunities.

As part of promoting a common understanding of inclusion and diversity, the **Strategy** defines persons with fewer opportunities, in the context of the Erasmus+ and European Solidarity Corps (hereafter, **ESC**) programmes, as:

> **"persons who for economic, social, cultural, geographical or health reasons, due to their migrant background, or for reasons such as disability or educational difficulties or for any other reason, including a reason that could give rise to discrimination under Article 21 of the Charter of Fundamental Rights of the European Union, face obstacles that prevent them from having effective access to opportunities"**

TIME TO REFLECT 1: SPECIFIC STRATEGIES

WE HAVE ALREADY REFERENCED A NUMBER OF EU STRATEGIES AND FRAMEWORKS RELEVANT TO THE TOPIC OF INCLUSION AND DIVERSITY, BUT HOW DOES THIS FEATURE IN YOUR OWN COUNTRY AND LOCALITY? ARE SPECIFIC STRATEGIES IN PLACE TO FACILITATE THE ENGAGEMENT AND SUPPORT OF PERSONS WITH FEWER OPPORTUNITIES IN EDUCATION AND TRAINING? HOW DO THESE ALIGN WITH EU STRATEGIES AND FRAMEWORKS? THIS LEVEL OF KNOWLEDGE AND INSIGHT IS EQUALLY IMPORTANT WHEN REFLECTING ON ERASMUS+ KA2 PARTNERSHIP PLANS TO ENGAGE LOCAL USER AND BENEFICIARY AUDIENCES ACROSS DIFFERENT EUROPEAN COUNTRIES.

Potential Barriers to Accessibility and Outreach are then categorised, as per Table 1. This list of potential barriers is not exhaustive and is provided as a reference for those looking to increase accessibility and outreach. It is also recognised that barriers can be stand-alone or be a combination of multiple factors.



Table 1: Potential Barriers to Accessibility and Outreach

DISABILITIES

Includes physical, mental, intellectual or sensory impairments which might hinder full and effective participation in society on the same footing as others.

HEALTH PROBLEMS

Includes barriers that might result from health issues including severe illnesses, chronic diseases and/or other physical or mental health-related situations that prevent participation.

BARRIERS LINKED TO EDUCATION AND TRAINING SYSTEMS

Includes barriers which might emerge among those struggling to perform in education and training systems for one or more reasons, including early leavers from education and training, NEETs (people not in education, employment or training) and low-skilled adults. Although other factors can play a role, including personal circumstances, these barriers are mostly seen as a result of educational systems with structural limitations or that do not fully account for individual needs, including curricular structures that make learning mobility abroad difficult.

CULTURAL DIFFERENCES

Whilst cultural differences can present barriers for all people, they can particularly affect persons with fewer opportunities. For example, cultural differences may pose a greater barrier to learning for people with a migrant or refugee background, especially newly arrived migrants, as well as people belonging to a national or ethnic minority, sign language users, and/or people with difficulties in linguistic adaptation and cultural inclusion. Exposure to foreign languages and cultural differences during Erasmus+ programme activities might prevent potential participants from applying (entry barrier) and/or limit the benefits of participation.

SOCIAL BARRIERS

Social adjustment difficulties such as limited social competences, anti-social or high-risk behaviours, (former) offenders, (former) drug or alcohol abusers, or social marginalisation can represent a barrier to participation. Other social barriers can stem from family circumstances or histories, for instance, being the first in the family to access higher education; being a parent, single parent, caregiver, breadwinner, or orphan; or having lived (or currently living) in institutional care.

ECONOMIC BARRIERS

Economic disadvantages can also represent potential barriers, such as a low standard of living, low income, learners who need to work to support themselves, dependence on the social welfare system, long-term unemployment, financially precarious situations or poverty, or homelessness.

BARRIERS LINKED TO DISCRIMINATION

Barriers can result from discrimination linked to gender (gender identity, gender expression, etc.), age, ethnicity, religion, beliefs, sexual orientation, disability, or can be intersectional (i.e., a combination of one or more of the aforementioned barriers).

GEOGRAPHICAL BARRIERS

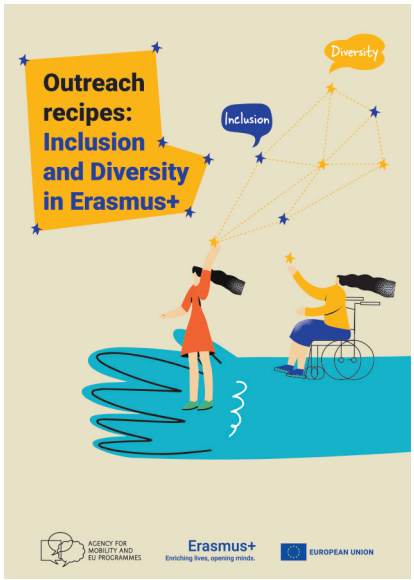
Living in remote or rural areas, small island communities, peripheral or outermost regions, urban suburbs, less-serviced areas (e.g., limited transport facilities), or less-developed regions and countries may also constitute a barrier to participation.



The [Roadmap Towards Active Engagement: Inclusion and Diversity in Erasmus+], released in 2024, stresses the importance of an inclusive approach in project design and considers how to actively involve persons with fewer opportunities at all project stages.

Recommendations and ideas are presented to inspire project leaders, including suggestions to:

- research needs, interests and barriers faced by persons with fewer opportunities and directly involve these audiences in needs assessment; create partnerships with networks and organisations that already support persons with fewer opportunities [BEFORE THE PROJECT BEGINS];
- enquire about reasons for non-participation to understand better and address possible barriers; introduce clear support systems and protocols so that difficulties can be easily identified and resolved; embed peer learning, consultation and feedback actions to facilitate open and honest feedback [DURING THE PROJECT LIFETIME];
- ensure that dissemination processes are participatory, open and accessible and that materials are accessible to all user and beneficiary audiences [IN THE CLOSING STAGES OF THE PROJECT OR AFTER IT ENDS].



Specific approaches are also outlined in [Outreach Recipes: Inclusion and Diversity in Erasmus+], published in 2025 by SALTO Inclusion and Diversity (Education and Training).

This resource underlines the importance of reaching out to persons with fewer opportunities in their own environments, through efforts and approaches that consider their specific information needs.

Highlighting educators as agents of change, the resource offers detailed guidance on starting with an individualised approach, with actions centred on the four stages of the outreach cycle: preparation, communication, safety, and empowerment.

The **Strategy** then considers diversity in the context of the Erasmus+ and ESC programmes, helping users and beneficiaries better understand it and ultimately defining it as a concept that embraces differences of all kinds.

"Some types of diversity are more obvious than others, such as ethnicity, religion, culture and language. But diversity expands beyond just these aspects. It also refers to different (dis)abilities, educational levels, social backgrounds, economic situations, health statuses, and places of origin. Erasmus+ aims to embrace and celebrate diversity so that difference becomes a positive source for learning, rather than the cause for negative competition and prejudice".



Inclusion and diversity can be viewed as closely connected and mutually reinforcing concepts. Diversity acknowledges a simple reality: our communities are made up of people with different backgrounds, experiences, perspectives and identities. Inclusion goes one step further. It is the deliberate practice of creating opportunities for everyone to participate, contribute and benefit. This means recognising that people face different barriers and may need different forms or levels of support to participate and benefit fairly and equally, reflecting the broader idea of equity. It involves recognising and responding to the needs of people facing barriers, exclusion, or disadvantage, ensuring their rights, dignity and potential are fully respected.

Additional inspiration can be found in the video link below, where the topic of inclusion and diversity is more fully explored from the SALTO perspective.

SALTO Inclusion and Diversity in Education and Training

Additionally, for KA2 projects that include mobility, the Inclusion and Diversity E-course for Assessors Evaluating KA1 Applications is a useful resource that can be accessed via Erasmus+ NAs.

TIME TO REFLECT 2: BARRIERS AND OBSTACLES

THINK ABOUT YOUR OWN FIELD OR PROFESSION (OR ONE THAT YOU HAVE WORKED IN PREVIOUSLY) AND THE AUDIENCES OF YOUNG PEOPLE AND ADULTS THAT YOU ENGAGED WITH. HOW MANY OF THESE INDIVIDUALS MIGHT BE CONSIDERED AS PERSONS WITH FEWER OPPORTUNITIES, ACCORDING TO THE DEFINITION PROVIDED? WHAT BARRIERS OR OBSTACLES WERE MOST EVIDENT OR IMPORTANT? HOW DOES THIS ALIGN WITH WHAT YOU HAVE SEEN IN THIS RESOURCE?

TIME TO REFLECT 3: TARGETED ACTIONS AND APPROACHES

THINK ABOUT YOUNG PEOPLE AND ADULTS THAT YOU HAVE WORKED WITH PREVIOUSLY, ESPECIALLY THOSE WITH FEWER OPPORTUNITIES. WHAT STEPS DID YOU TAKE TO REACH OUT TO THESE AUDIENCES TO FACILITATE THEIR ENGAGEMENT IN EDUCATION, TRAINING, EMPLOYMENT AND CIVIC LIFE? HOW DOES THIS TRANSLATE TO YOUR EXPECTATIONS FOR ERASMUS+? WHAT ACTIONS OR APPROACHES DO YOU LOOK FOR IN A KA2 PARTNERSHIP PROJECT?

CHECK YOUR UNDERSTANDING: SECTION 2

QUESTION 1: WHAT ARE THE FOUR HORIZONTAL PRIORITIES OF ERASMUS+?

A. LEARNING AND SKILLS RECOGNITION
B. ENVIRONMENT AND FIGHT AGAINST CLIMATE CHANGE
C. INCLUSION AND DIVERSITY
D. PARTICIPATION OF WOMEN AND GIRLS IN STEM
E. DIGITAL TRANSFORMATION
F. BASIC SKILLS AND KEY COMPETENCES
G. UPSKILLING AND RESKILLING
H. PARTICIPATION IN DEMOCRATIC LIFE, COMMON VALUES AND CIVIC ENGAGEMENT

QUESTION 2: WHICH STATEMENT BEST DESCRIBES THE RELATIONSHIP BETWEEN DIVERSITY AND INCLUSION?

A. DIVERSITY AND INCLUSION MEAN THE SAME THING
B. DIVERSITY REFERS TO DIFFERENCES BETWEEN PEOPLE, WHILE INCLUSION IS THE DELIBERATE PRACTICE OF ENSURING EVERYONE CAN PARTICIPATE AND BENEFIT EQUALLY
C. INCLUSION ONLY APPLIES TO PERSONS WITH DISABILITIES
D. DIVERSITY ONLY RELATES TO ETHNICITY AND CULTURE

QUESTION 3: ACCORDING TO THE ERASMUS+ INCLUSION AND DIVERSITY STRATEGY, WHICH OF THE FOLLOWING COULD CONTRIBUTE TO SOMEONE BEING CONSIDERED A PERSON WITH FEWER OPPORTUNITIES? (SELECT ALL THAT APPLY)

A. ECONOMIC DISADVANTAGE
B. DISABILITY
C. LIVING IN A REMOTE AREA
D. EDUCATIONAL DIFFICULTIES
E. MIGRANT BACKGROUND
F. LOW SKILLED
G. HEALTH ISSUES

QUESTION 4: POTENTIAL BARRIERS TO PARTICIPATION SHOULD ALWAYS BE CONSIDERED INDIVIDUALLY BECAUSE THEY RARELY OCCUR TOGETHER (TRUE OR FALSE)?

A. TRUE
B. FALSE

QUESTION 5: WHY IS IT IMPORTANT TO IDENTIFY BARRIERS BEFORE A PROJECT BEGINS?

A. TO IMPROVE REPORTING REQUIREMENTS
B. TO ENSURE THAT PLANNED ACTIVITIES AND SUPPORT MEASURES ARE DESIGNED TO MEET THE SPECIFIC NEEDS OF BENEFICIARIES
C. TO REDUCE PROJECT COSTS
D. TO SATISFY ERASMUS+ NA REQUIREMENTS ONLY

QUESTION 6 (SCENARIO): AN ORGANISATION PLANS AN ERASMUS+ PROJECT FOR UNEMPLOYED ADULTS LIVING IN RURAL AREAS. PARTNERS DESIGN ALL ACTIVITIES WITHOUT CONSULTING POTENTIAL PARTICIPANTS BECAUSE THEY ALREADY UNDERSTAND THE NEEDS OF THE TARGET GROUP. WHICH IMPORTANT PRINCIPLE HAS BEEN OVERLOOKED?

QUESTION 7 (SCENARIO): A PROJECT RECRUITS PARTICIPANTS FROM A WIDE VARIETY OF BACKGROUNDS BUT PROVIDES EXACTLY THE SAME INFORMATION, SUPPORT AND COMMUNICATION TO EVERYONE. DOES THIS DEMONSTRATE INCLUSION OR DIVERSITY (OR BOTH, OR NEITHER), AND WHY DO YOU THINK THIS?

ANSWERS ARE PROVIDED AT THE END OF THIS RESOURCE

3 RECOGNISING INCLUSION AND DIVERSITY IN KA2 FUNDING PROPOSALS

As an assessor, you play a key role in recognising inclusion and diversity in Erasmus+. While there are many issues to address, you should also assess **Erasmus+ funding proposals** through an inclusion lens.

Many proposals make an overarching commitment to inclusion and diversity. Yet, not all offer the insight and detail needed to show what they will actually do to acknowledge and respond to diversity and actively embed inclusion measures. Assessors must know what to look for to recognise and reward applicants who effectively address inclusion and diversity in their Erasmus+ funding proposals for KA2 partnerships.

In the table below, we reflect on three key actions (KA210, KA220 and KA240) that Erasmus+ National Agencies (NAs) are directly responsible for within Erasmus+ KA2 Partnerships, and for which you might be invited to assess.

SMALL-SCALE PARTNERSHIPS (KA210)	COOPERATION PARTNERSHIPS (KA220)
These partnerships aim to widen access for small-scale actors and less experienced organisations, promoting a more inclusive Erasmus+. In this respect, it is important to respect the principle of proportionality, ensuring planned actions align with targeted aims, while recognising these are smaller projects with limited funding and often more modest ambitions.	These partnerships are often larger, with higher funding levels, and target transformation and change at individual, organisational, and/or sectoral levels, including improved quality of work and practices and strengthened capacity to work transnationally. Proportionality is important to consider, depending on overall goals and ambitions and the requested lump sum amount.
EUROPEAN PARTNERSHIPS FOR SCHOOL DEVELOPMENT (KA240)	
These partnerships target strategic innovation, improved quality of learning and teaching and capacity building to enhance cooperation in school education. Partnerships bring together schools, authorities and other key stakeholders, including those responsible for initial and continuing teacher education. Actions focus on exchanging and transferring effective practices, developing innovative approaches, and strengthening cross-border cooperation and mobility. With lump-sum funding of €400,000, the focus is on measurable, transferable, and sustainable results and impact.	

In KA210 and KA220 funding proposals, applicants are required to select at least one horizontal and/or sectoral priority that is relevant to the targeted actions and objectives. In these cases, projects that select the inclusion and diversity priority should be considered highly relevant. In KA240 funding proposals, there is a predetermined focus on encouraging better cross-border cooperation and mobility between schools across Europe, with no requirement for additional priorities to be selected.

In all three cases (KA210, KA220 and KA240), applicants must take into account the horizontal aspects of the Erasmus+ programme (inclusion and diversity; digital transformation; environment and the fight against climate change; participation in democratic life, common values and civic engagement) when preparing their funding proposal.

As an assessor, **consider how and to what extent inclusion and diversity feature in the overall project design**. Is it clear WHY (if at all) inclusion and diversity have been targeted or prioritised? Is it clear WHAT obstacles or barriers exist and HOW these are to be addressed through the targeted actions and outputs? Does the proposal provide sufficient insight into WHO the key beneficiary audiences are, and does it specifically include young people and/or adults who are under-represented or have fewer opportunities? Is it clear HOW these audiences will be directly accessed, engaged, and supported during project delivery, and what overall purpose and potential impact it has?

Insights presented below relate to the four quality assessment criteria and should help you to fully consider aspects relating to inclusion and diversity when assessing funding proposals for KA210, KA220 and KA240. In some cases, references to inclusion and diversity are explicit; in others, they are more implicit.

Relevance

Important Sub-criteria [and funding actions]

- the proposal is relevant to the Action's objectives and priorities; in addition, the proposal will be considered highly relevant if it addresses the priority "inclusion and diversity" [KA210, KA220].
- the proposal is relevant to the respect and promotion of shared EU values, such as respect for human dignity, freedom, democracy, equality, the rule of law, and respect for human rights, as well as fighting any form of discrimination [KA210, KA220, KA240].
- the proposal is based on a genuine and adequate needs analysis [KA220].
- the proposal is innovative [KA220].

What to Consider as an Assessor

- how convincingly the project addresses inclusion and diversity, where selected as a priority, and how well this aligns with project objectives, innovation goals, listed target groups, and plans for their engagement.
- whether the planned activities align with EU values and are designed in a non-discriminatory manner.
- whether persons with fewer opportunities are included among the targeted beneficiaries (not compulsory) and how convincingly their needs are defined, alongside possible barriers to participation.
- whether the innovation targets are realistic, taking into account the needs of key beneficiaries, including persons with fewer opportunities and those who educate, train, and support them.



Quality of Project Design and Implementation

Important Sub-criteria [and funding actions]

- the project objectives are clearly defined, realistic, and address the needs and goals of the participating organisations and their target groups [KA210, KA220].
- the proposed methodology is clear, adequate and feasible: the work plan is clear, complete and effective; the project is cost-effective and allocates appropriate resources to each activity… [KA210, KA220, KA240].
- the activities are designed in an accessible and inclusive way… [KA210, KA220, KA240].
- the quality of practical arrangements, management and support modalities in learning, teaching and training activities [KA220].

What to Consider as an Assessor

- how clearly the proposal integrates inclusion and diversity into the targeted methodology and results.
- whether the efforts to build knowledge-skills-capacity-awareness in support of inclusion and diversity are clear, credible and achievable, being responsive to the needs of key user and beneficiary audiences, including persons with fewer opportunities, with clear plans for their engagement.
- whether the actions centred on the development and testing of tools, platforms, frameworks, and resources are clear, credible and achievable, being responsive to the needs of key user and beneficiary audiences, including persons with fewer opportunities, and with clear plans for their engagement.
- whether the planned tasks and budgets have been considered through the lens of inclusion, to ensure the full and equal participation of persons with fewer opportunities, highlighting specific actions centred on supportive and supported engagement.

Quality of the Partnership and Cooperation Arrangements

Important Sub-criteria [and funding actions]

- the project involves an appropriate mix of participating organisations in terms of profile… [KA210, KA220].
- the size and scope of the partnership are appropriate to achieve the planned project results [KA240].
- the project involves newcomers and less experienced organisations to the Action [KA210, KA220].
- the proposal includes effective mechanisms for coordination and communication… [KA210, KA220, KA240].

What to Consider as an Assessor

- whether the required capacity and expertise exist to allow for the effective identification, engagement and support of users and beneficiaries with fewer opportunities.
- the extent to which newcomers and less-experienced organisations are involved in the partnership (especially pertinent for KA210, which has confirmed ambitions for reducing entry barriers to the Erasmus+ Programme for organisations with smaller organisational capacity).

Impact

Important Sub-criteria [and funding actions]

- the project has the potential to positively impact its participants and participating organisations, as well as their wider communities [KA210, KA220].
- the proposal clearly identifies improvements in the practices, policies, and procedures of school authorities and schools that will result from the project [KA240].
- the proposal includes concrete, effective steps to share the project results within the participating organisations, with other organisations, and with the public... [KA210, KA220, KA240].

What to Consider as an Assessor

- the adequacy and sufficiency of the targeted actions, both during and beyond the project lifetime, to achieve positive impact on users and beneficiaries with fewer opportunities.
- how the levels and forms of engagement among users and beneficiaries with fewer opportunities might be specifically measured and reported.
- the adequacy of dissemination measures and resources to reach all identified user and beneficiary audiences, including efforts to ensure accessibility in outputs and wider outreach measures.

TIME TO REFLECT 4: GENERIC OR GENUINE EFFORTS

IMAGINE THAT YOU ARE ASSESSING MULTIPLE PROPOSALS IN A WEEK. HOW WOULD YOU DIFFERENTIATE ACROSS THE DIFFERENT PROPOSALS? WHAT SIGNS WOULD INDICATE THAT INCLUSION AND DIVERSITY HAVE BEEN GENUINELY EMBEDDED WITHIN A PROPOSAL RATHER THAN BEING ADDED AS A GENERIC OR STANDARD TEXT? WHAT ASPECTS WOULD ENCOURAGE YOU TO BE MORE POSITIVE IN YOUR ASSESSMENT OF INCLUSION AND DIVERSITY?



CHECK YOUR UNDERSTANDING: SECTION 3

QUESTION 1: PROJECTS ONLY NEED TO CONSIDER INCLUSION AND DIVERSITY IF THEY HAVE SELECTED THIS AS A HORIZONTAL PROGRAMME PRIORITY (TRUE OR FALSE)?

A. TRUE
B. FALSE

QUESTION 2: WHY IS IT IMPORTANT FOR ASSESSORS TO LOOK BEYOND GENERAL STATEMENTS ABOUT INCLUSION AND DIVERSITY?

A. BECAUSE ALL PROJECTS MUST INCLUDE PARTICIPANTS WITH FEWER OPPORTUNITIES
B. BECAUSE APPLICANTS SHOULD DEMONSTRATE HOW INCLUSION AND DIVERSITY HAVE BEEN CONSIDERED IN PROJECT DESIGN
C. BECAUSE INCLUSION AND DIVERSITY CANNOT BE ADDRESSED GENERALLY
D. BECAUSE INCLUSION AND DIVERSITY REQUIRE SPECIFIC ACCESSIBILITY AND ENGAGEMENT MEASURES AND INDICATORS.

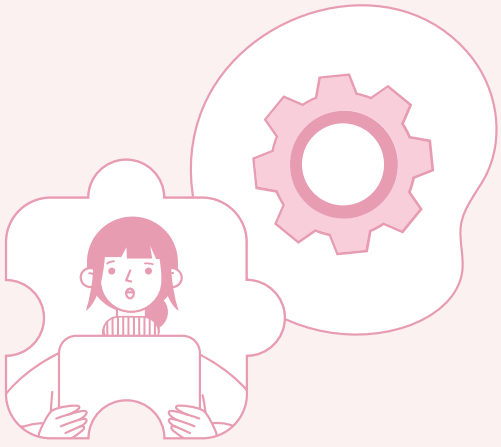
QUESTION 3: A KA220 PROPOSAL INCLUDES YOUNG PEOPLE WITH FEWER OPPORTUNITIES AS DIRECT BENEFICIARIES BUT DOES NOT FORESEE SPECIFIC SUPPORT MEASURES AND/OR ADDITIONAL RESOURCES TO SUPPORT THEIR PARTICIPATION. UNDER WHICH QUALITY ASSESSMENT CRITERION WOULD YOU ADDRESS THIS?

A. RELEVANCE
B. QUALITY OF PROJECT DESIGN AND IMPLEMENTATION
C. QUALITY OF THE PARTNERSHIP AND COOPERATION ARRANGEMENTS
D. IMPACT

QUESTION 4 (SCENARIO): A PARTNERSHIP PROPOSES INNOVATIVE DIGITAL LEARNING RESOURCES BUT HAS NOT CONSIDERED WHETHER LEARNERS WITH FEWER OPPORTUNITIES AND/OR THOSE WITH LIMITED DIGITAL ACCESS WILL BE ABLE TO ACCESS AND ENGAGE WITH THESE RESOURCES EQUALLY AND EFFECTIVELY. WHICH GAPS OR INADEQUACIES SHOULD YOU BE CONCERNED WITH AS AN ASSESSOR?

QUESTION 5 (SCENARIO): WHICH OF THE FOUR ERASMUS+ QUALITY CRITERIA PROVIDES THE BEST OPPORTUNITY FOR ASSESSING INCLUSION AND DIVERSITY IN A KA2 PARTNERSHIP PROJECT? EXPLAIN YOUR REASONING.

ANSWERS ARE PROVIDED AT THE END OF THIS RESOURCE



4 RECOGNISING INCLUSION AND DIVERSITY IN KA2 PROJECT DELIVERY AND REPORTING

As an assessor, you play an important role in recognising and distinguishing inclusion and diversity efforts in **Erasmus+ project delivery, often communicated in interim, progress or final reports**.

Periodic or progress reports provide an opportunity for mid-term assessment, reflecting on the nature and effectiveness of project management activities, the breadth and form of partner input, quality assurance and evaluation measures, and the level of advancement or achievement in delivering the planned actions and deliverables. In most cases, periodic or progress reports are assessed internally by Erasmus+ NA staff.

Final reports are an important means of determining successful project delivery, with internal and external assessors invited to undertake quality assessments and provide comments and scores that Erasmus+ NAs use to calculate the project's final eligible lump sum, while linking the results to the funding beneficiary. This resource focuses on final report assessments and how to recognise and **reward partnerships that effectively address inclusion and diversity in project delivery**.

While there are many issues to address during final report assessment, it is important that you consider project delivery and reporting through the lens of inclusion. Indeed, since 2023, final report templates have included a specific question on "what steps were taken (if any) to address the horizontal aspects of project implementation", including "inclusion and diversity". Moreover, beneficiaries are asked to comment specifically on how their project contributes to achievement of the original objectives and priorities, which is especially important where "inclusion and diversity" has been selected as a named priority at the point of application (KA210, KA220).

In all cases, final report assessment should focus on the extent to which the project was implemented in line with the approved grant application (as per Annex 2 of the beneficiary agreement), referencing inclusion and diversity where positive actions and achievements merit recognition or where there has been a significant change or deviation from that which was originally planned.

As detailed below, the three partnership actions use different quality assessment models.



Final Reports for Small-Scale Partnerships (KA210)

For KA210, partnerships are judged against the same criteria used at the point of application (relevance; quality of project design and implementation; quality of the partnership and cooperation arrangements; impact), relying on a single quality assessment and focusing on activities implemented and results achieved, according to the final report submitted by the beneficiary. In all cases, projects must score at least 60 points for the agreed lump sum to be paid in full, with percentage-based reductions applied to projects scoring lower than this.

Comments can be included under the different assessment criteria; for example, mention successful (or less successful) alignment with the horizontal priority for inclusion and diversity, where confirmed as a priority at the point of application, or assess specific aspects of inclusion and diversity evident during project delivery.

EXAMPLE:

Where the original proposal for a Small-Scale Partnership spoke of an inclusion and diversity strategy being developed to guide project delivery, you might comment during final report assessment on how this helped in the delivery of certain objectives and in efforts to engage specific target audiences (Relevance), how effectively this commitment was converted to action (Quality of Project Design), how this facilitated partner cooperation (Quality of the Partnership and Cooperation Arrangements) and/or how this positively impacted user or beneficiary audiences at different levels (Impact).

Final Reports for Cooperation Partnerships (KA220)

For KA220, partnerships are judged using a different quality assessment model that focuses on Work Packages (WP) defined at the point of application. In all cases, at least two assessors are engaged, with a final consolidation process bringing the comments and scores of the assessors together in a single quality assessment. Final report and assessment questions are structured by WP. WP1 reflects on partner engagement, cooperation and overall project delivery, and requires detailed comments from the assessors but no score. Subsequent work packages assess the quality and extent of delivery of the planned actions and deliverables, each requiring detailed comments and a score out of 100. Final scores are automatically calculated, taking into account each WP's budget ratio and the consolidated assessment scores. In all cases, projects must score at least 70 points (for each WP and for the project as a whole) to receive the agreed lump sum in full, with percentage-based reductions applied (at the WP or project level) when lower scores are awarded.

Alignment with horizontal priorities, and efforts to address inclusion and diversity in any aspect of the project, should be addressed predominantly under WP1, reflecting holistically on implementation consistency compared to the original vision and commitment. You may also reference this in other WPs where it features strongly in the targeted activities and outputs, but focus more on the nature, level, and quality of delivery compared with what was originally planned.

EXAMPLE:

Where the original proposal for a Cooperation Partnership spoke of developing and testing accessible training programmes and promoting greater inclusion and diversity in male-dominated industries, you might comment under WP1 as to whether this horizontal priority was effectively addressed, whilst also commenting under other WPs in relation to how effectively the planned activities, outputs and outcomes were achieved, including efforts to engage and support persons with fewer opportunities.

Final Reports for European Partnerships for School Development (KA240)

For KA240, as a relatively new funding action, final report assessment will follow the same model as KA220, with at least two assessors engaged in a final quality review and with projects required to score at least 70 points (for each WP and for the project as a whole) for the agreed lump sum to be paid in full.

TIME TO REFLECT 5: TARGETED RECOMMENDATIONS

IF YOU WERE ADVISING AN EXISTING PARTNERSHIP COORDINATOR PRIOR TO SUBMISSION OF THEIR FINAL REPORT, WHAT THREE RECOMMENDATIONS WOULD YOU GIVE TO HELP THEM EFFECTIVELY DEMONSTRATE HOW INCLUSION AND DIVERSITY WERE SUCCESSFULLY INTEGRATED INTO OVERALL PROJECT DELIVERY?



CHECK YOUR UNDERSTANDING: SECTION 4

QUESTION 1: WHICH STATEMENT BEST DESCRIBES THE PURPOSE OF FINAL REPORT ASSESSMENT?

A. TO HELP IN SELECTING FUTURE ERASMUS+ APPLICATIONS
B. TO DETERMINE THE EXTENT TO WHICH THE PROJECT WAS IMPLEMENTED IN LINE WITH THE APPROVED GRANT APPLICATION
C. TO MONITOR OUTPUT DELIVERY
D. TO ASSESS THE FINANCIAL MANAGEMENT OF THE PROJECT

QUESTION 2: WHY IS IT IMPORTANT TO COMPARE THE FINAL REPORT WITH THE ORIGINAL GRANT APPLICATION WHEN ASSESSING INCLUSION AND DIVERSITY?

A. TO CONFIRM THAT THE PROJECT SPENT ALL OF ITS LUMP SUM BUDGET ON INCLUSION-RELATED ACTIVITIES
B. TO ENSURE THAT EVERY PROJECT ENGAGED THE SAME NUMBER OF PARTICIPANTS WITH FEWER OPPORTUNITIES
C. TO DETERMINE THE EXTENT TO WHICH THE ORIGINAL COMMITMENTS RELATING TO INCLUSION AND DIVERSITY WERE SUCCESSFULLY DELIVERED
D. TO VERIFY THAT ALL PROJECT ACTIVITIES REMAINED EXACTLY THE SAME AS PLANNED, REGARDLESS OF CHANGING CIRCUMSTANCES

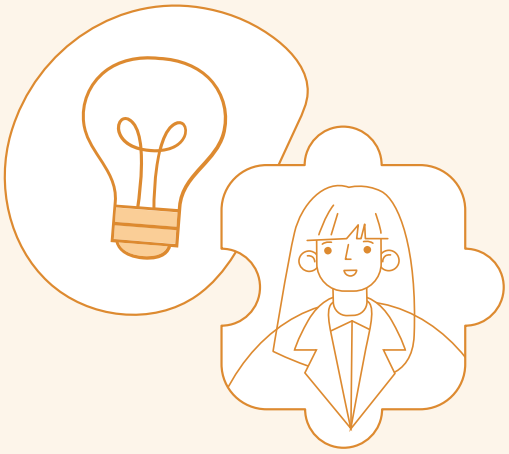
QUESTION 3: WHERE MIGHT COMMENTS ON INCLUSION AND DIVERSITY BE INCLUDED DURING QUALITY ASSESSMENT OF A FINAL REPORT FOR A COOPERATION PARTNERSHIP (KA220)?

A. WP1 FOR PROJECT MANAGEMENT
B. ANY WORK PACKAGE WHERE INCLUSION AND DIVERSITY FEATURE STRONGLY
C. COMMENTS FOR THE NATIONAL AGENCY
D. ALL OF THE ABOVE

QUESTION 4 (SCENARIO): A PARTNERSHIP SELECTED INCLUSION AND DIVERSITY AS THE MAIN PRIORITY IN THE ORIGINAL FUNDING PROPOSAL BUT ONLY A BRIEF STATEMENT IS PRESENTED IN THE FINAL REPORT, WITH LITTLE EVIDENCE OF TARGETED ACTIONS OR SUPPORT MEASURES. HOW MIGHT THIS INFLUENCE YOUR ASSESSMENT?

QUESTION 5 (SCENARIO): A FINAL REPORT FOR A KA220 PARTNERSHIP STATES THAT IT EXCEEDED ALL PLANNED OUTPUTS BUT MAKES NO REFERENCE TO ENGAGING PERSONS WITH FEWER OPPORTUNITIES, DESPITE THIS BEING A MAJOR FEATURE OF THE APPROVED PARTNERSHIP PROJECT. WHAT ISSUES SHOULD AN ASSESSOR CONSIDER IN THIS SCENARIO?

ANSWERS ARE PROVIDED AT THE END OF THIS RESOURCE



5 REWARDING INCLUSION AND DIVERSITY

Discussing actual scores has limited value, as scoring thresholds and ranges vary across partnership actions, and **different scoring models** are used to assess **funding proposals** and **final reports**. What KA2 partnership actions have in common is the definitions used to determine whether an application is very good, good, fair, or weak. These definitions can also help apply the inclusion and diversity lens during assessment.

VERY GOOD
Addresses all relevant aspects of the criterion in question convincingly and successfully. The answer provides all the information and evidence needed, with no concerns or areas of weakness.

GOOD
Addresses the criterion well, but it could be slightly improved. The answer provides clear information on all or nearly all of the required evidence.

FAIR
Broadly addresses the criterion, but there are some weaknesses. The answer provides some relevant information, but several areas lack detail or are unclear.

WEAK
Fails to address the criterion or cannot be judged due to missing or incomplete information. The answer does not address the question asked, or gives very little relevant information.

For example, can a funding proposal or final report be considered very good if it does not convincingly or successfully address all relevant aspects of inclusion and diversity in the overall project vision, final technical report, or project narrative? In all cases, consider how well inclusion and diversity are addressed, based on the clarity, relevance, and extent of information provided in the funding proposal or final report (for final reports, you may also need to consider any associated evidence provided).

In actions where a range of scores is provided, as shown in the table below, **the level at which inclusion and diversity is addressed can help determine a score, giving more weight to partnerships that convincingly and effectively address this important topic**.

Maximum Score	Very Good	Good	Fair	Weak
35	30-35	24-29	18-23	0-17
30	26-30	21-25	15-20	0-14
25	22-25	18-21	13-17	0-12
20	17-20	14-16	10-13	0-9
15	14-15	11-13	8-10	0-7

TIME TO REFLECT 6: REWARDING INCLUSION

ASSESSORS ARE OFTEN REMINDED OF THE NEED TO CONSIDER PROPOSALS AS HIGHLY RELEVANT IF THEY ADDRESS THE PRIORITY FOR "INCLUSION AND DIVERSITY" BUT IS THIS SOMETHING THAT YOU CONTEMPLATE FULLY WHEN AWARDING YOUR SCORES? HOW MUCH WEIGHT DO YOU PERSONALLY GIVE TO THIS ASPECT WHEN AWARDING SCORES, AND WHAT EVIDENCE WOULD CONVINCE YOU THAT A PROPOSAL GENUINELY DESERVES RECOGNITION FOR ITS INCLUSION AND DIVERSITY MEASURES?

In addition to rewarding applicants who effectively address inclusion and diversity in their funding proposal or final report, there is also an opportunity to build capacity by providing **constructive feedback** on the adequacy and extent of inclusion and diversity measures. However, follow your National Agency's guidance, as some agencies prefer not to include direct recommendations.

Below are examples of semi-constructive comments that might appear in an assessment of an Erasmus+ Key Action 2 funding proposal or final report.

For example, semi-constructive assessment comments relating to a funding proposal might include:

- whilst there are positive ambitions to engage learners with fewer opportunities, it is not clearly stated who will be targeted for engagement, what barriers to participation currently exist and what means of tackling or addressing these barriers are being proposed;
- whilst targeting the participation of learners with fewer opportunities, specific engagement targets have not been defined at the point of application;
- ambitions for engaging learners with fewer opportunities are encouraging yet limited insight is given into how this complements wider project development goals;
- whilst there are credible plans for supporting learners with fewer opportunities, the nature of this additional support is not fully or convincingly outlined;
- whilst having clear ambitions for learning recognition for those taking part in pilot testing actions, insufficient detail is given into support measures that might be introduced to ensure that all participants are equally able to meet documentation and evidencing requirements;
- whilst having clear intentions to engage mentors to provide online support to learners with additional needs, insufficient insight is given into how mentors are to be selected, and how they will be prepared for this role.



Alternatively, assessment comments relating to a final project report might include:

- whilst the proposal confirmed positive ambitions for engaging and supporting learners with fewer opportunities or additional needs, the final report provides limited detail on how these audiences were identified and engaged, with insufficient insight into initial barriers and how they were addressed or overcome;
- whilst targeting the participation of learners with fewer opportunities, actual levels of engagement are not clearly defined, including efforts to compare this with figures for wider learner engagement;
- whilst sufficient data is presented on levels of engagement among learners with fewer opportunities, limited insight is given into how this complements overall development goals and impact ambitions;
- whilst encouraging to hear that additional measures were put in place to support learners with fewer opportunities or additional needs, the nature of this additional support is not fully detailed or explained;
- whilst having clear ambitions for learning recognition for those taking part in pilot testing actions, comparative data on levels of achievement among participants with fewer opportunities or additional needs are not clearly evidenced or detailed;
- efforts to engage mentors to provide online support to learners with additional needs are welcomed and encouraging, yet with limited insight given into how mentors were selected and prepared for this role.

In summary, whilst not every institution will be fully proficient in all aspects of inclusion and diversity, it is your role as an assessor to differentiate between those that address this well or very well – which would feature in the assessment bands of good or very good - and those who demonstrate clear room for improvement. Of course, assessors need to set proportional expectations, considering the size, scale, and past experience of the applicant or beneficiary, and recognising efforts to embed inclusion and diversity even in the smallest projects.

We anticipate this resource will provide a solid baseline for addressing inclusion and diversity in Erasmus+ KA2 partnerships and help assessors more effectively recognise and reward organisations that successfully address inclusion and diversity in their funding proposal or final project report.

TIME TO REFLECT 7: CHANGE AND IMPROVEMENT

EVEN THE MOST EXPERIENCED ASSESSORS CAN BENEFIT FROM GUIDANCE OR TRAINING, ESPECIALLY ON TOPICS AS COMPLEX OR WIDE-REACHING AS INCLUSION AND DIVERSITY. HAVING WORKED THROUGH THIS RESOURCE ON HOW TO RECOGNISE AND REWARD INCLUSION AND DIVERSITY, WHAT CHANGES WILL YOU MAKE TO YOUR OWN ASSESSMENT PRACTICE TO ENSURE THAT INCLUSION AND DIVERSITY ARE CONSISTENTLY RECOGNISED AND APPROPRIATELY REWARDED IN KA2 PARTNERSHIP PROPOSALS AND FINAL REPORTS?



CHECK YOUR UNDERSTANDING: SECTION 5

QUESTION 1: WHICH SCORING BAND WOULD BE BEST SUITED TO A FINAL REPORT THAT ADDRESSES ALL RELEVANT ASPECTS CONVINCINGLY, PROVIDES ALL NECESSARY EVIDENCE AND RAISES NO CONCERNS?

A. WEAK
B. FAIR
C. GOOD
D. VERY GOOD

QUESTION 2: WHY IS IT IMPORTANT FOR ASSESSORS TO BE PROPORTIONAL WHEN JUDGING INCLUSION AND DIVERSITY?

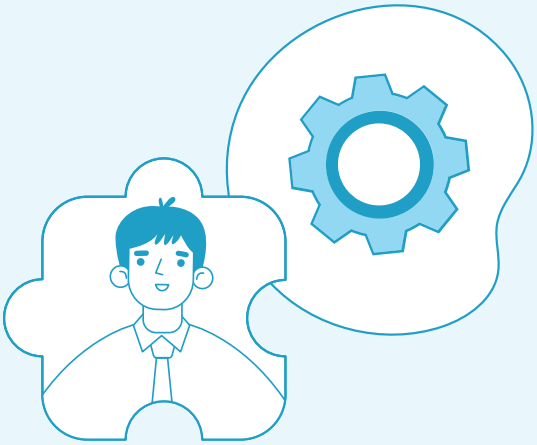
A. BECAUSE ALL ERASMUS+ PROJECTS SHOULD DEMONSTRATE THE SAME EFFORT TO ADDRESS INCLUSION AND DIVERSITY, REGARDLESS OF THEIR SIZE OR FUNDING
B. BECAUSE EXPECTATIONS SHOULD REFLECT THE SIZE, SCALE, FUNDING LEVEL AND EXPERIENCE OF THE APPLICANT OR BENEFICIARY, WHILST STILL RECOGNISING GENUINE EFFORTS TO EMBED INCLUSION AND DIVERSITY
C. BECAUSE INCLUSION AND DIVERSITY SHOULD ONLY BE CONSIDERED IN LARGE-SCALE COOPERATION PROJECTS
D. BECAUSE SMALLER ORGANISATIONS ARE NOT EXPECTED TO ADDRESS INCLUSION AND DIVERSITY

QUESTION 3: WHICH OF THE FOLLOWING BEST REPRESENTS A SEMI-CONSTRUCTIVE ASSESSMENT COMMENT?

A. THE APPLICANT SHOULD REWRITE THE SECTION ON INCLUSION AND DIVERSITY, PROVIDING GREATER CLARITY AND DETAIL
B. THE PROPOSAL IS POOR
C. WHILST AMBITIONS FOR ENGAGING LEARNERS WITH FEWER OPPORTUNITIES ARE ENCOURAGING, LIMITED DETAIL IS PROVIDED ON HOW BARRIERS WILL BE IDENTIFIED AND ADDRESSED
D. MORE WORK IS REQUIRED

QUESTION 4 (SCENARIO): A FINAL REPORT PRESENTS COMPREHENSIVE PARTICIPATION STATISTICS BUT PROVIDES VERY LITTLE EVIDENCE OF HOW LEARNERS WITH FEWER OPPORTUNITIES WERE IDENTIFIED, SUPPORTED OR BENEFITTED FROM THE PROJECT. WHAT ASPECTS WOULD YOU COMMENT ON DURING YOUR ASSESSMENT?

ANSWERS ARE PROVIDED AT THE END OF THIS RESOURCE



6 CHECK YOUR UNDERSTANDING: ANSWERS

CHECK YOUR UNDERSTANDING: ANSWERS FOR SECTION 2

QUESTION 1: WHAT ARE THE FOUR HORIZONTAL PRIORITIES OF ERASMUS+?
ANSWER: B, C, E AND H ARE THE FOUR HORIZONTAL PRIORITIES FOR ERASMUS+

QUESTION 2: WHICH STATEMENT BEST DESCRIBES THE RELATIONSHIP BETWEEN DIVERSITY AND INCLUSION?
ANSWER: B (DIVERSITY REFERS TO DIFFERENCES BETWEEN PEOPLE, WHILE INCLUSION IS THE DELIBERATE PRACTICE OF ENSURING EVERYONE CAN PARTICIPATE AND BENEFIT EQUALLY)

QUESTION 3: ACCORDING TO THE ERASMUS+ INCLUSION AND DIVERSITY STRATEGY, WHICH OF THE FOLLOWING COULD CONTRIBUTE TO SOMEONE BEING CONSIDERED A PERSON WITH FEWER OPPORTUNITIES? (SELECT ALL THAT APPLY)
ANSWER: ALL OF THE LISTED OPTIONS ARE CORRECT; ALL SHOULD BE SELECTED

QUESTION 4: POTENTIAL BARRIERS TO PARTICIPATION SHOULD ALWAYS BE CONSIDERED INDIVIDUALLY BECAUSE THEY RARELY OCCUR TOGETHER (TRUE OR FALSE)?
ANSWER: B (FALSE: THE FRAMEWORK RECOGNISES THAT BARRIERS MAY OCCUR INDIVIDUALLY OR IN COMBINATION)

QUESTION 5: WHY IS IT IMPORTANT TO IDENTIFY BARRIERS BEFORE A PROJECT BEGINS?
ANSWER: B (TO ENSURE THAT PLANNED ACTIVITIES AND SUPPORT MEASURES ARE DESIGNED TO MEET THE SPECIFIC NEEDS OF BENEFICIARIES)

QUESTION 6 (SCENARIO): AN ORGANISATION PLANS AN ERASMUS+ PROJECT FOR UNEMPLOYED ADULTS LIVING IN RURAL AREAS. PARTNERS DESIGN ALL ACTIVITIES WITHOUT CONSULTING POTENTIAL PARTICIPANTS BECAUSE THEY ALREADY UNDERSTAND THE NEEDS OF THE TARGET GROUP. WHICH IMPORTANT PRINCIPLE HAS BEEN OVERLOOKED?

SUGGESTED ANSWER: DIRECT CONSULTATION AND/OR INVOLVEMENT OF PERSONS WITH FEWER OPPORTUNITIES (IN THIS CASE, UNEMPLOYED ADULTS LIVING IN RURAL AREAS) IN NEEDS ASSESSMENT AND PROJECT DESIGN.

QUESTION 7 (SCENARIO): A PROJECT RECRUITS PARTICIPANTS FROM A WIDE VARIETY OF BACKGROUNDS BUT PROVIDES EXACTLY THE SAME INFORMATION, SUPPORT AND COMMUNICATION TO EVERYONE. DOES THIS DEMONSTRATE INCLUSION OR DIVERSITY (OR BOTH, OR NEITHER) AND WHY DO YOU THINK THIS?

SUGGESTED ANSWER: IT DEMONSTRATES DIVERSITY, BUT NOT NECESSARILY INCLUSION, BECAUSE INCLUSION REQUIRES ADAPTING ACTIVITIES AND SUPPORT MEASURES SO THAT EVERYONE CAN PARTICIPATE EQUALLY, EQUITABLY, AND EFFECTIVELY.

IF YOU FOUND THESE QUESTIONS DIFFICULT, WE INVITE YOU TO REVISIT SECTION 2, WHERE RELEVANT INSIGHTS AND EXPLANATIONS ARE GIVEN ON INCLUSION AND DIVERSITY IN ERASMUS+.

CHECK YOUR UNDERSTANDING: ANSWERS FOR SECTION 3

QUESTION 1: PROJECTS ONLY NEED TO CONSIDER INCLUSION AND DIVERSITY IF THEY HAVE SELECTED THIS AS A HORIZONTAL PROGRAMME PRIORITY (TRUE OR FALSE)?

ANSWER: FALSE (ALL KA210, KA220 AND KA240 PROPOSALS SHOULD CONSIDER THE HORIZONTAL PRIORITIES OF ERASMUS+, INCLUDING INCLUSION AND DIVERSITY, IRRESPECTIVE OF WHETHER THIS IS SELECTED AS A DIRECT PRIORITY FOR THE PROJECT)

QUESTION 2: WHY IS IT IMPORTANT FOR ASSESSORS TO LOOK BEYOND GENERAL STATEMENTS ABOUT INCLUSION?

ANSWER: B (BECAUSE APPLICANTS SHOULD DEMONSTRATE HOW INCLUSION AND DIVERSITY HAVE BEEN CONSIDERED IN PROJECT DESIGN)

QUESTION 3: A KA220 PROPOSAL INCLUDES YOUNG PEOPLE WITH FEWER OPPORTUNITIES AS DIRECT BENEFICIARIES BUT DOES NOT FORESEE SPECIFIC SUPPORT MEASURES AND/OR ADDITIONAL RESOURCES TO SUPPORT THEIR PARTICIPATION. UNDER WHICH QUALITY ASSESSMENT CRITERION WOULD YOU ADDRESS THIS?

ANSWER: MOSTLY B, BUT IT MIGHT ALSO BE IMPORTANT TO CONSIDER UNDER IMPACT.

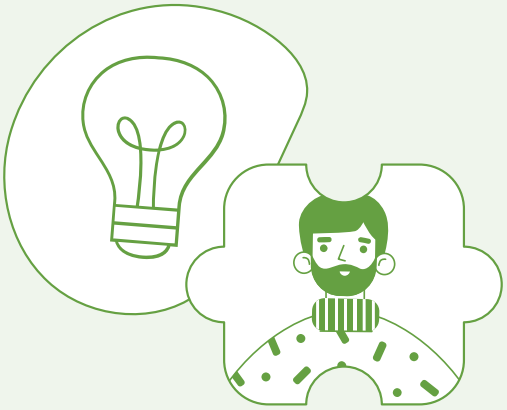
QUESTION 4 (SCENARIO): A PARTNERSHIP PROPOSES INNOVATIVE DIGITAL LEARNING RESOURCES BUT HAS NOT CONSIDERED WHETHER LEARNERS WITH FEWER OPPORTUNITIES AND/OR THOSE WITH LIMITED DIGITAL ACCESS WILL BE ABLE TO ACCESS AND ENGAGE WITH THESE RESOURCES EQUALLY AND EFFECTIVELY. WHICH GAPS OR INADEQUACIES SHOULD YOU BE CONCERNED WITH AS AN ASSESSOR?

SUGGESTED ANSWER: ACCESSIBILITY; INCLUSIVE PROJECT DESIGN; EQUALITY OF PARTICIPATION; WHETHER IMPACT CAN REALISTICALLY BE ACHIEVED FOR ALL BENEFICIARIES

QUESTION 5 (SCENARIO): WHICH OF THE FOUR ERASMUS+ QUALITY CRITERIA PROVIDES THE BEST OPPORTUNITY FOR ASSESSING INCLUSION AND DIVERSITY IN A KA2 PARTNERSHIP PROJECT? EXPLAIN YOUR REASONING.

SUGGESTED ANSWER: THERE IS NO SINGLE CORRECT ANSWER, PROVIDED YOU HAVE SOLID REASONING AND JUSTIFICATION.

IF YOU FOUND THESE QUESTIONS DIFFICULT, WE INVITE YOU TO REVISIT SECTION 3, WHERE RELEVANT INSIGHTS AND EXPLANATIONS ARE GIVEN ON RECOGNISING INCLUSION AND DIVERSITY IN KA2 FUNDING PROPOSALS.



CHECK YOUR UNDERSTANDING: ANSWERS FOR SECTION 4

QUESTION 1: WHICH STATEMENT BEST DESCRIBES THE PURPOSE OF FINAL REPORT ASSESSMENT?
ANSWER: MOSTLY B (INCLUDING SOME REFLECTION ON OUTPUT DELIVERY AND FINANCIAL MANAGEMENT)

QUESTION 2: WHY IS IT IMPORTANT TO COMPARE THE FINAL REPORT WITH THE ORIGINAL GRANT APPLICATION WHEN ASSESSING INCLUSION AND DIVERSITY?
ANSWER: C (TO DETERMINE THE EXTENT TO WHICH THE ORIGINAL COMMITMENTS RELATING TO INCLUSION AND DIVERSITY WERE SUCCESSFULLY DELIVERED, WITH ANY SIGNIFICANT DEVIATIONS CONVINCINGLY JUSTIFIED)

QUESTION 3: WHERE MIGHT COMMENTS ON INCLUSION AND DIVERSITY BE INCLUDED DURING QUALITY ASSESSMENT OF A FINAL REPORT FOR A COOPERATION PARTNERSHIP (KA220)?
ANSWER: ALL OF THE ABOVE.

QUESTION 4 (SCENARIO): A PARTNERSHIP SELECTED INCLUSION AND DIVERSITY AS THE MAIN PRIORITY IN THE ORIGINAL FUNDING PROPOSAL BUT ONLY A BRIEF STATEMENT IS PRESENTED IN THE FINAL REPORT, WITH LITTLE EVIDENCE OF TARGETED ACTIONS OR SUPPORT MEASURES. HOW MIGHT THIS INFLUENCE YOUR ASSESSMENT?

SUGGESTED ANSWER: THE LACK OF INSIGHT AND EVIDENCE ON INCLUSION AND DIVERSITY ACTIVITIES SHOULD BE REFLECTED IN YOUR ASSESSMENT, BUT IT IS ALWAYS IMPORTANT TO COMPARE "PLANNED VERSUS ACTUAL" TASKS, ACTIVITIES, AND DELIVERABLES AGAINST THE PROPOSED ASSESSMENT MODEL FOR YOUR KA2 PARTNERSHIP ACTION.

QUESTION 5 (SCENARIO): A FINAL REPORT FOR A KA220 PARTNERSHIP STATES THAT IT EXCEEDED ALL PLANNED OUTPUTS BUT MAKES NO REFERENCE TO ENGAGING PERSONS WITH FEWER OPPORTUNITIES, DESPITE THIS BEING A MAJOR FEATURE OF THE APPROVED PARTNERSHIP PROJECT. WHAT ISSUES SHOULD AN ASSESSOR CONSIDER IN THIS SCENARIO?

SUGGESTED ANSWER: CONSISTENCY WITH THE APPROVED APPLICATION (WORK PACKAGES, TASKS, DELIVERABLES, PARTICIPATION LEVELS, ETC.); WHETHER INCLUSION AND DIVERSITY COMMITMENTS WERE DELIVERED AND WHETHER ANY CHANGES OR DEVIATIONS ARE CONVINCINGLY EXPLAINED OR JUSTIFIED; WHETHER EVIDENCE IS PROVIDED TO SUPPORT CLAIMS MADE IN THE FINAL REPORT.

IF YOU FOUND THESE QUESTIONS DIFFICULT, WE INVITE YOU TO REVISIT SECTION 4, WHERE RELEVANT INSIGHTS AND EXPLANATIONS ARE GIVEN ON RECOGNISING INCLUSION AND DIVERSITY IN KA2 PROJECT DELIVERY AND REPORTING.

CHECK YOUR UNDERSTANDING: ANSWERS FOR SECTION 5

QUESTION 1: WHICH SCORING BAND WOULD BE BEST SUITED TO A FINAL REPORT THAT ADDRESSES ALL RELEVANT ASPECTS CONVINCINGLY, PROVIDES ALL NECESSARY EVIDENCE AND RAISES NO CONCERNS?
ANSWER: D (VERY GOOD)

QUESTION 2: WHY IS IT IMPORTANT FOR ASSESSORS TO BE PROPORTIONAL WHEN JUDGING INCLUSION AND DIVERSITY?
ANSWER: B (BECAUSE EXPECTATIONS SHOULD REFLECT THE SIZE, SCALE, FUNDING LEVEL AND EXPERIENCE OF THE APPLICANT OR BENEFICIARY, WHILST STILL RECOGNISING GENUINE EFFORTS TO EMBED INCLUSION AND DIVERSITY)

QUESTION 3: WHICH OF THE FOLLOWING BEST REPRESENTS A SEMI-CONSTRUCTIVE ASSESSMENT COMMENT?
ANSWER: C (WHILST AMBITIONS FOR ENGAGING LEARNERS WITH FEWER OPPORTUNITIES ARE ENCOURAGING, LIMITED DETAIL IS PROVIDED ON HOW BARRIERS WILL BE IDENTIFIED AND ADDRESSED)

QUESTION 4 (SCENARIO): A FINAL REPORT PRESENTS COMPREHENSIVE PARTICIPATION STATISTICS BUT PROVIDES LITTLE EVIDENCE OF HOW LEARNERS WITH FEWER OPPORTUNITIES WERE IDENTIFIED, SUPPORTED, OR BENEFITED FROM THE PROJECT. WHAT ASPECTS WOULD YOU COMMENT ON DURING YOUR ASSESSMENT?

SUGGESTED ANSWER: IN ALL CASES, IT IS IMPORTANT TO CONSIDER HOW PROJECT DELIVERY ALIGNS WITH COMMITMENTS MADE IN THE ORIGINAL FUNDING PROPOSAL. YOU MIGHT ALSO NEED TO CONSIDER WHETHER THE FINAL REPORT: CLEARLY AND EFFECTIVELY IDENTIFIES OR DISTINGUISHES PARTICIPANTS WITH FEWER OPPORTUNITIES; EXPLAINS THE BARRIERS THAT PARTICIPANTS FACED AND INDIVIDUALS OR GROUPS OF PARTICIPANTS WERE IDENTIFIED FOR POSSIBLE ENGAGEMENT; DESCRIBES SPECIFIC SUPPORT MEASURES THAT WERE INTRODUCED TO FACILITATE THEIR PARTICIPATION; DEMONSTRATES THE EFFECTIVENESS OR IMPACT OF THE SUPPORT MEASURES THAT WERE INTRODUCED. IN THIS CASE, WHILST PARTICIPATION DATA IS WELL REPORTED, EVIDENCE RELATING TO INCLUSION AND DIVERSITY ASPECTS IS NOT COMPLETE, AND THIS NEEDS TO BE MENTIONED IN YOUR ASSESSMENT.

IF YOU FOUND THESE QUESTIONS DIFFICULT, WE INVITE YOU TO REVISIT SECTION 5, WHERE RELEVANT INSIGHTS AND EXPLANATIONS ARE GIVEN ON REWARDING INCLUSION AND DIVERSITY WHEN SCORING YOUR ASSESSMENTS.





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