



D4.2 METHODOLOGIES FOR MONITORING AND EVALUATION OF PROJECT PROCESSES - COLLABORATION AND PARTNERSHIP PROCESSES

Project acronym: OTTER

Project title: Outdoor Science Education for a Sustainable Future

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OTTER project

OTTER is a H2020 funded project that aims to **enhance the understanding of Education Outside the Classroom (EOC) methods and pedagogies** and how they can help **improve the acquisition of scientific knowledge and transferable skills in students, specifically in the field of environmental sustainability and the reduction of plastic waste**. It aims to increase interest in scientific topics among young people, while also contributing to the range of innovative educational projects and the increase of scientific citizenship within the EU.



OTTER aims to strengthen educational outside-the-classroom (EOC) **networks within Europe**, connecting experts from four different regions within the continent (**Finland, Hungary, Ireland and Spain**). The strengthening of these networks will be utilised to carry out a programme of EOC pilot schemes and analysis of the effect they have on the performance of participating students, including their levels of sophisticated consumption and scientific citizenship, to increase understanding of the effects of education outside the classroom on EU citizens. The pilot schemes will share a common theme revolving around issues of plastic waste and recycling in order to build upon recent momentum in tackling related global educational, social, and environmental issues and due to the close relationship between reducing plastic waste and the need for more sophisticated consumers.

Project Consortium



Geonardo Environmental Technologies
(**GEO**)



European Science Foundation (**ESF**)



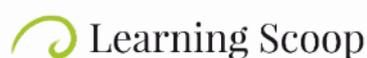
University of Groningen (**RUG**)



University of Limerick (**UL**)



Bridge Budapest (**BB**)



Learning Scoop - oppimisen osuuskunta (**LS**)



The Big Van Theory (**TBVT**)



Center for the Advancement of Research & Development in Educational Technology
(**CARDET**)

Executive Summary



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This project has received funding from the European Union's Horizon 2020 research and innovation programme under Grant Agreement No 101006482

1. Rationale

This is the second document of [WP4 Monitoring and Evaluation](#). We build on previous OTTER project deliverables ([D4.1 Monitoring and evaluation framework for the whole project](#), [D1.3 Gender Strategy](#), [D1.4. Data Management Plan](#), [D7.1. H Requirement n°1](#) and [D7.2. POPD Requirement No.4](#)) to detail how we will evaluate and monitor partnerships and collaborations in the consortium context, focusing on the four pilot countries (Hungary, Finland, Ireland, and Spain).

Specifically, we outline the methodological approaches and theoretical frameworks that the OTTER project will use to evaluate the partners' performance in terms of their respective roles, levels of engagement, and levels of collaboration, as well as the effectiveness and efficiency of the pilots.

We describe the approaches we will use to measure the knowledge and skills project partners have acquired throughout the project and their participation in the decision-making process. The quality of the project's deliverables and results will also be verified. Finally, the practices and processes of collaboration will be examined using various quantitative and qualitative methods, including tools such as questionnaires, interviews and focus groups.

The results of this evaluation will provide valuable insights into the strengths and weaknesses of the project and inform future efforts to improve similar projects and future partnerships related to education outside the classroom in European countries.

In synthesis, we describe tools and actions to

- Evaluate the performance of the pilots in terms of effectiveness and efficiency.
- Investigate the nature of collaborations across the partner countries.
- Evaluate the performance of the partners in terms of roles, engagement, and collaborations.
- Examine the knowledge and skills developed by the project partners.

Introduction



Partnerships and collaborations are crucial to succeeding in educational projects as they rely heavily on effective partnerships between schools, educational settings, and other stakeholders to bring new learning experiences to students. Therefore, measuring the success of these collaborations and partnerships is essential to ensure that they are aligned with curriculum goals and achieve the desired learning outcomes.

In addition, monitoring and evaluating collaboration and partnership processes can provide valuable insights into the strengths and weaknesses of these processes and help the OTTER team structure future accreditation guidelines and maximise their impact. This is particularly important in the European context, where the education system is characterised by rich cultural diversity and a multicultural approach to learning. In such an environment, it is essential to ensure that partnerships and collaborations are effective and produce equitable outcomes for all students and professionals. Thus, monitoring and evaluating collaboration and partnership processes can provide practical insights into how these processes impact communities and produce results aligned with curricular needs.

In two previous studies we conducted in the context of OTTER (*D2.1 Literature review and compendium of successful practices* and *D5.1 Report on EOC accreditation in Europe*), we identified a variety of positive results, methodologies, initiatives, educational programmes, and spaces in which EOC has taken place in the European context. Given this diversity, the methods we present here are designed to provide a comprehensive understanding of the nature of collaborations, the quality of partnerships, the effectiveness of collaborative efforts, and support the development of inclusive and equitable educational experiences for all students.

This document is structured as follows:

- In the section **Background**, we return to the points made in **D4.1** and present the key terms and references we have considered for the development of tools for assessing and monitoring partnerships and collaborations.
- In the section **Targets & Tools**, we present the tools that will be used to measure the collaboration and partnership processes between the different stakeholders.
- In the **Actions** section, we return to principles presented in previous OTTER deliverables to clarify how the project process evaluation aligns with what we have indicated in the Gender Strategy, Ethics documentation and the Data Management Plan.
- Finally, in the **Final Considerations** section, we point out the paths of analysis, challenges, and their respective possible solutions for implementing this plan for process evaluation.

Background



2. Methodologies

As presented in *D4.1 Monitoring and evaluation framework*, the evaluation and monitoring of the OTTER project will be implemented using mixed methods. The choice of a mixed approach was deliberately made due to the possibility of triangulating data to increase the validity and reliability of the results, as well as the chances of overcoming the limitations arising from only one methodological approach or one data collection tool. Furthermore, in this way, it is possible to have more flexibility in the face of the multicultural contexts with which we are working, as well as have more comprehensive data for decision-making. In addition, having various tools can increase the involvement of stakeholders participating in the evaluation, as different parties may be more receptive to specific methodological approaches and tools.

To organise the evaluation and monitoring methodologies and tools related to the collaborations and partnerships, we draw on documents produced by the European Commission (e.g., European Commission, 2021), by government agencies that contribute to the implementation of educational projects (e.g., Allen et al., 2008) and of EU projects (e.g., Impacttool Partnerschappen Erasmus+, 2023) and by funded projects (e.g., ERA-LEARN 2020, Didham & Ofei-Manu, 2020). We also considered key theoretical references for defining indicators and actors (e.g., Lusthaus et al., 1999, Geoghegan et al., 2004, Wildridge et al., 2004, Better Evaluation, 2014, LEARN, 2015), for structuring tools and methods (e.g., Halliday et al., 2004, Sadashiva, 2012, Befani & O'Donnell, 2016), as well as for designing research instruments such as questionnaires and interview protocols (e.g., Couper et al., 2001, Creswell & Clark, 2006, De Vaus & De Vaus, 2013, Coburn & Penuel, 2016, Shah et al., 2018).

3. Key definitions

To ensure that those involved in the evaluation have a clear and shared understanding of what is intended to be measured, we present key terms associated with the indicators in this document. The shared language of these key terms may enable stakeholders to communicate effectively throughout the different stages of evaluation and monitoring, making it easier to reach a consensus on what has been achieved and what still needs to be accomplished. This effort is also based on the notion that clarifying evaluation goals can improve the focus and consequent effectiveness of the entire evaluation process. In this way, these definitions and operationalisations will be included in the instruments used in the project, with the necessary adjustments to the target audience's understanding.

3.1 Collaboration

Collaboration is the process of working together in a coordinated way, sharing information, ideas, resources, and responsibilities to achieve common goals related to OTTER and education outside the classroom. Collaboration here may imply a teamwork

approach based on open communication, mutual respect and relationship building among members involved in a task. Collaboration can occur for specific goals and tasks (e.g., elaborating a deliverable or designing an OTTER Outdoor Lab), having a flexible approach so that a collaborator can have a one-off or ongoing commitment according to needs and commitments agreed with the team.

3.2 Efficiency and Effectiveness

Effectiveness is the degree to which a specific result is achieved concerning predetermined outcomes. Given the broad objectives of the OTTER project, we will assess effectiveness in two ways.

- Firstly, in relation to the partnership and collaboration processes established during the pilots. In this sense, we are interested in identifying if the **pilot study** has generated collaborations between teachers and other stakeholders for the success of OTTER Labs.
- Second, considering that effectiveness is also associated with the idea of inducing change, we intend to evaluate possible changes that originated throughout the project regarding knowledge of EOC practices and the planning of activities using **OTTER Labs**.

Regarding **efficiency**, we are adopting the definition that considers the optimisation of resources. Thus, we will evaluate the OTTER Labs concerning the optimisation of resources by teachers and stakeholders involved in the pilots. We are interested to know if using the **OTTER Labs methodology** is effective from a planning and implementation point of view.

3.3 Engagement

The idea of engagement is being used in different ways in the project. Such distinction is essential as it will be used in the tools dedicated to the various stakeholders in the project.

- In the context of the **consortium team**, engagement refers to the commitment and dedication of team members towards the project goals and objectives. This includes their willingness to take ownership of tasks, proactively address issues, and contribute to decision-making and problem-solving processes. High levels of team engagement can lead to improved project performance and a more positive project outcome.
- Regarding **other stakeholders**, engagement refers to involvement, interest, or interaction with OTTER activities. It refers to active participation and involvement in completing a task, such as participating in the **OTTER Hubs**, the **OTTER Outdoors Labs** and the project's dissemination activities. It can also encompass collaboration, communication, and a shared sense of responsibility for project

outcomes when there is a partnership (considering the definition we present below), that is, when the interaction between the stakeholder and the members of the consortium is not only punctual (e.g., participation in an event).

Considering the definitions we have presented, engagement can be measured self-reflexively.

3.4 Hierarchy

Hierarchical relations can affect the collaboration and partnership between the parties involved in a project. Therefore, we want to assess the project stakeholders' perception of the role of hierarchy in building effective working relationships. Thus, the idea of hierarchy will be used in the evaluation instruments as the relationship of power or authority that may exist between different people, institutions, or groups. In the case of OTTER, we want to identify whether this hierarchy is vertical (e.g., decision-making and coordination are performed by one group) or horizontal (e.g., decision-making and coordination are shared or alternate).

3.5 Partnership

In the OTTER context, we are considering partnership as a long-term collaborative relationship with the aim of working together on a project that brings mutual benefits for all involved. Such a partnership implies an equitable division of responsibilities, resources and decision-making among the consortium members based on mutual trust and cooperation. This definition is being used in the context of OTTER evaluation to assess the level of cooperation and equity among consortium members. A partnership can be evaluated in terms of how well consortium members share resources and responsibilities and make decisions together to achieve common project objectives. Thus, partnership differs from collaboration as a long-term relationship, as it involves a broader, more substantial commitment and an equitable division of labour to be jointly undertaken.

3.6 Performance

We are considering performance as the measure of a stakeholder's contribution to the overall success of the collaboration or partnership, including their level of engagement, communication, collaboration, and ability to work as a team. In addition, it is associated with measuring how well a stakeholder performs the role or function assigned to them in a collaboration or partnership concerning the goals and expectations set – in the case of OTTER, the goals and expectations are associated with the success of the OTTER Labs pilots.

3.7 Stakeholder

A stakeholder is a term used to refer to any person or group that may be affected or affect the project directly or indirectly. In order to ensure that the needs and expectations of OTTER stakeholders are taken into account and that their contributions are valued, we are working with stakeholder mapping, which indicates the different profiles with which we are engaging. OTTER stakeholders include consortium members, external advisory board, teachers, students, EOC practitioners, informal and non-formal education professionals, parents/student families, education professionals, companies, NGOs, governments, and others. Given this diversity and scope, the evaluation of OTTER must consider the perspectives and needs of the stakeholders involved to ensure that the project objectives are achieved effectively and sustainably, benefiting as many stakeholders as possible.

Targets & Tools



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In this section, we present the tools (questionnaires and focus group questions) that will be used to measure the collaboration and partnership processes between the different stakeholders. The following table provides an overview of the tools.

Table 1: Overview of the tools.

Tool and format	Objectives	Targets	When will it be administered?
Tool A: Online questionnaire evaluating collaboration and partnerships <i>[4 close-ended questions, 4 open-ended questions, 3 Likert-type questions]</i>	(i) To map the nature of collaborations and partnerships. (ii) To identify possible (collaborations and partnerships) indicators that could be incorporated into accreditation processes	All stakeholders	Teachers/Educators: Right after the pilots Other stakeholders: At the end of the project
Tool B: Online questionnaire evaluating performance <i>[12 Likert-type questions]</i>	To measure the knowledge and skills targets have acquired throughout the project	(i) Teachers attending the OTTER-Labs and/or from the pilot schools. (ii) Educators in partnerships with pilot schools.	Before and right after the pilots.
Tool C: Focus group/Interview <i>[11 to 14 discussion questions]</i>	(i) To map the nature of collaborations and partnerships. (ii) To help identify possible indicators that could be incorporated into future accreditation processes. (iii) To measure the knowledge and skills partners have acquired throughout the project. (iv) To measure the effectiveness of collaborations and partnerships between teachers/ schools, and out-of-school educational settings.	All stakeholders	After the pilots
Tool D: Online questionnaire evaluating the deliverables <i>[8 close-ended questions + 2 open-ended questions]</i>	To measure the quality of the project's deliverables and results by considering the processes of collaboration and partnerships.	Consortium partners and advisory board	In the middle and towards the end of the project.

4. Tool A

This questionnaire will be delivered online according to the key points in the table below. In addition, the highlighted words in each question will be defined according to what we outlined in the previous section of this document.

● Sample

PART 1 – In this section, we want to know a little bit about you and your connection to the OTTER project

1. What is your role in the OTTER project? Choose the best option that describes your role in the OTTER project.

[Close-ended] *Consortium partner. Teacher. Teachers' trainer. EOC practitioner. Outdoor leader. Media creator. Scientist/Researcher. Policymaker. Student parent/Family. External advisory board. Another stakeholder (Please describe)*

2. What is your gender?

[Close-ended] *Woman. Man. Nonbinary. Other. Do not want to disclose.*

3. How do you evaluate your level of engagement with the OTTER project so far?

[Likert scale] *1 (No engagement) (...) → 10 (Full engagement)*

PART 2 – In this section, we want to identify the nature of partnerships and collaborations between individuals with different roles in the OTTER project occur.

4a. Indicate the stakeholders you have contacted over the course of the project to date.

[Close-ended] *Consortium partner. Teacher. Teachers' trainer. EOC practitioner. Outdoor leader. Media creator. Scientist/Researcher. Policymaker. Student parent/Family. External advisory board. Another stakeholder (Please describe)*

4b. Please rank your interaction with stakeholders according to whom you had the most contact.

[Close-ended] *Consortium partner. Teacher. Teachers' trainer. EOC practitioner. Outdoor leader. Media creator. Scientist/Researcher. Policymaker. Student parent/Family. External advisory board. Another stakeholder (Please describe)*

5. We ask you to repeat items 5a and 5b presented below for each type of project stakeholder you have interacted with. For example, if you interacted with consortium partners and EOC practitioners as a teacher, you should answer questions 5a and 5b for consortium partners and then answer for EOC practitioners later.

5a. What is your evaluation of the [collaboration](#) between you and <first stakeholder based on a list of options>?

[Likert scale] 1 (No collaboration) (...) → 10 (Full collaboration)

+ I have not interacted with this stakeholder yet.

5b. What is your evaluation of the communication between you and <second stakeholder based on a list of options>?

[Likert scale] 1 (No communication) (...) → 10 (Full communication)

+ I have not interacted with this stakeholder yet.

6. How do you see the current [hierarchy](#) of the OTTER project?

[Close-ended] <Ranking the list of stakeholders, being able to include several at the same level>

PART 3 – In this last section, we want to identify the nature of the relationships.

7. Make a drawing/sketch/model that illustrates your current view of [partnership](#) in the context of the OTTER project.

[Open-ended] <Drawing space>

8. What challenges do you identify in the [collaboration](#) and [partnership](#) processes happening in the OTTER project?

[Open-ended] <Writing space>

9. What can be done to improve [partnerships](#) and [collaborations](#) in the OTTER project?

[Open-ended] <Writing space>

10. Please feel free to use this space to suggest improvements to this form or to make general comments about the project.

[Open-ended] <Writing space>

5.Tool B

This self-reflective questionnaire will be delivered online. Teachers participating in the pilot schools and those with contact with OTTER Labs through the online platform will also be eligible to answer it. Besides being disseminated among the pilots, it will be spread among members of the Hubs and those who connect to the learning platform.

• Sample

Evaluate each of the following dimensions in a self-reflective way on a scale of 1 to 10 (1 being the lowest and 10 the highest).

Regarding your **knowledge** about **education outside the classroom (EOC)**, please rate each statement below

A. I believe my level of **understanding** of EOC concepts and goals is
(Low) 1 – 2 – 3 – 4 – 5 – 6 – 7 – 8 – 9 –10 (High) – Not applicable

B. I believe my level of **knowledge** of EOC pedagogical approaches is
(Low) 1 – 2 – 3 – 4 – 5 – 6 – 7 – 8 – 9 –10 (High) – Not applicable

C. I believe my level of **awareness** of EOC good practices
(Low) 1 – 2 – 3 – 4 – 5 – 6 – 7 – 8 – 9 –10 (High) – Not applicable

Regarding your **skills** to develop **curriculum activities incorporating EOC**, please rate each statement below

A. I believe my **ability to design and develop** EOC activities and lessons is
(Low) 1 – 2 – 3 – 4 – 5 – 6 – 7 – 8 – 9 –10 (High) – Not applicable

B. I believe my **understanding** of curriculum alignment and integration is
(Low) 1 – 2 – 3 – 4 – 5 – 6 – 7 – 8 – 9 –10 (High) – Not applicable

C. I believe my **ability to assess and evaluate** EOC activities and lessons is
(Low) 1 – 2 – 3 – 4 – 5 – 6 – 7 – 8 – 9 –10 (High) – Not applicable

Regarding your **skills to implement EOC activities**, please rate each statement below

A. I believe my **ability to implement** EOC activities and lessons effectively in schools is

(Low) 1 – 2 – 3 – 4 – 5 – 6 – 7 – 8 – 9 –10 (High) – Not applicable

B. I believe my **ability to adapt** EOC activities and lessons to different learning environments is

(Low) 1 – 2 – 3 – 4 – 5 – 6 – 7 – 8 – 9 –10 (High) – Not applicable

C. I believe my **ability to effectively manage resources** for EOC activities and lessons is

(Low) 1 – 2 – 3 – 4 – 5 – 6 – 7 – 8 – 9 –10 (High) – Not applicable

Regarding your **skills related to collaborations and partnerships to implement EOC activities**, please rate each statement below

A. I believe my **ability to establish and maintain partnerships** with schools, museums, parks, research centres, and historical sites is

(Low) 1 – 2 – 3 – 4 – 5 – 6 – 7 – 8 – 9 –10 (High) – Not applicable

B. I believe my **ability to negotiate and resolve conflicts** in those partnerships is

(Low) 1 – 2 – 3 – 4 – 5 – 6 – 7 – 8 – 9 –10 (High) – Not applicable

C. I believe my **ability to communicate** effectively with partners is

(Low) 1 – 2 – 3 – 4 – 5 – 6 – 7 – 8 – 9 –10 (High) – Not applicable

6. Tool C

Focus groups/Interview will be conducted after the questionnaire application. They will be conducted in the local language. The consortium partners will receive training before collecting this data to support data collection. The interviews may be completed virtually or in person.

• Sample

Sample questions for the focus group/interview with **teachers**

1. In your view, what were the main objectives of the OTTER project?
2. Can you, in a few words, explain what the nature of your engagement with the project has been?

3. What were the main challenges you encountered during the activities you conducted as part of the OTTER project?
4. In the questionnaire you answered we asked you about how the collaboration between you and other people who participated in the project worked. Could you comment on your answer?
5. How did you and other project stakeholders communicate and exchange ideas during the project?
6. What were the main strategies used to ensure collaboration between you and other project stakeholders?
7. How were decisions made related to the implementation of EOC in your school, and what was the role of different stakeholders in these decisions?
8. How were you prepared to work outside the classroom, and what were the main skills and competencies required for this?
9. How was the effectiveness of the activities you conducted during the project evaluated, and what was the role of the different stakeholders in this evaluation?
10. What were the main results achieved through your participation in the project, and how should these be shared with the educational community?
11. How has the experience of collaborating on the project impacted your work?
12. How did the collaboration between teachers/schools and out-of-school educational settings impact the students' achievement and engagement during the EOC activities?
13. What suggestions do you have for improving the impact of collaboration between teachers/schools and out-of-school educational settings on student achievement and engagement (e.g., sharing of objectives/goals and resources, improving communication, training, etc.)?
14. What were the lessons learned from the project, and how can these be applied to other education projects outside the classroom?

Sample questions for the focus group/interview with **EOC practitioners**

1. How would you define the concept of education outside the classroom? What is your experience with the EOC?
2. What were the project's main objectives, and how do you think it impacted your practice?
3. In the questionnaire you answered we asked you about how the collaboration between you and other people who participated in the project worked. Could you comment on your answer?
4. What were the main challenges you and other team members encountered in interacting with other stakeholders during the project collaboration?
5. How did you and your team communicate and exchange ideas with other professionals involved in OTTER during the project?
6. What were the main strategies to ensure collaboration between you and the stakeholders involved in the project?

7. How were decisions made regarding your role in the project, and what were the different stakeholders' roles in these decisions?
8. How were you prepared to participate in the OTTER project, and what were the main skills and competencies you needed to do so?
9. How did you contribute to work on the educational content that was explored during the OTTER Lab?
10. How did you deal with the differences in the level of knowledge and skills of the project participants?
11. What lessons were learned about collaboration in education projects outside the classroom? How can these lessons be applied in other contexts?
12. How did collaboration between teachers/schools and out-of-school educational settings impact the students' achievement and engagement during the EOC activities?
13. What suggestions do you have for improving the impact of collaboration between teachers/schools and out-of-school educational settings on student achievement and engagement (e.g., sharing of objectives/goals and resources, improving communication, training, etc.)?

Sample questions for the focus group/interview with **other stakeholders**

1. How would you define the concept of education outside the classroom? What is your experience with the EOC?
2. What were the project's main objectives, and how do you think it impacted your practice?
3. What were the main challenges you and other team members encountered in interacting with other stakeholders during the project collaboration?
4. How did you and your team communicate and exchange ideas with other professionals involved in OTTER during the project?
5. What were the main strategies to ensure collaboration between you and the stakeholders involved in the project?
6. How were decisions made regarding your role in the project, and what were the different stakeholders' roles in these decisions?
7. How were you prepared to participate in the OTTER project, and what were the main skills and competencies you needed to do so?
8. How did you deal with the differences in the level of knowledge and skills of the project participants?
9. How has the experience of collaborating on the project impacted your work?
10. What were the main results achieved through your participation in the project, and how should these be shared?
11. What lessons were learned about collaboration in education projects outside the classroom? How can these lessons be applied in other contexts?

7. Tool D

This questionnaire evaluates the process of deliverables elaborations based on partnership and collaboration. Assessing the criteria presented in the tool comprehensively evaluates how well stakeholders work together to achieve project goals and deliver high-quality educational outcomes. Each team member in the consortium will answer it individually and virtually.

● Sample

Regarding **communication**, choose the option that best describes your experience working in the OTTER project consortium.

3- All consortium partners clearly and effectively communicated with one another, regularly sharing information and ideas, and taking the time to understand each other's perspectives.

2- Communication between consortium partners was generally good, but there were some instances where information could have been more effectively shared or understood.

1- Communication could have been more transparent and complete, and there were significant misunderstandings or conflicts among consortium partners.

Regarding **flexibility**, choose the option that best describes your experience working in the OTTER project consortium.

3- All consortium partners were willing to be flexible in their approaches and to consider different ideas or solutions. As a result, they could adapt to changing circumstances and needs.

2- Most consortium partners were willing to be flexible and adapt, but there were some instances where they were reluctant to change their plans or approaches.

1- Many consortium partners were inflexible and resistant to changing their plans or approaches, creating significant collaboration challenges.

Regarding **responsiveness**, choose the option that best describes your experience working in the OTTER project consortium.

3- Consortium partners were responsive to each other's needs and concerns and took timely action to address any issues that arose.

2- Consortium partners were generally responsive, but there were some delays or gaps in addressing issues or concerns.

1- Consortium partners were often unresponsive, which led to significant delays or unresolved issues.

Regarding **teamwork**, choose the option that best describes your experience working in the OTTER project consortium.

3- Consortium partners worked together effectively as a team, actively collaborating and supporting one another to achieve project goals.

2- Most consortium partners worked well together, but there were some instances where they worked independently or did not support each other as effectively.

1- Many consortium partners worked independently and did not collaborate or support one another, which created significant challenges in achieving project goals.

If you would like to add any comments about your experience in the consortium so far regarding **communication, flexibility, responsiveness and teamwork**, please use the space below.

Regarding **accountability**, choose the option that best describes your experience working in the OTTER project consortium.

3- Consortium partners were accountable for their actions and deliverables, and they took responsibility for addressing any problems or shortcomings.

2- Most consortium partners were accountable, but there were some instances where they were unwilling to take responsibility or did not follow through on their commitments.

1- Many consortium partners were not accountable and failed to meet their commitments or take responsibility for addressing problems.

Regarding **decision-making**, choose the option that best describes your experience working in the OTTER project consortium.

3- Consortium partners collaborate to make decisions, incorporate different perspectives, and agree on courses of action.

2- Most consortium partners collaborate on decision-making but sometimes fail to incorporate different perspectives.

1- Decisions are made without consortium partners' input or perspectives, or some consortium partners are unwilling to compromise or collaborate.

Regarding **problem-solving**, choose the option that best describes your experience working in the OTTER project consortium.

3- Consortium partners anticipate and address problems, communicate potential issues, and collaborate to find solutions.

2- Most consortium partners proactively address problems but may not consistently communicate potential issues or collaborate to find solutions.

1- Problems are not proactively addressed, communicated, or ignored, or consortium partners are unwilling to collaborate to find solutions.

Regarding **conflict resolution**, choose the option that best describes your experience working in the OTTER project consortium.

3- Consortium partners resolve conflicts effectively through open communication, active listening, and mutual respect.

2- Most consortium partners resolve conflicts effectively but may not consistently practice open communication, active listening, or mutual respect.

1- Conflicts are not resolved effectively, consortium partners may avoid or escalate conflicts, or there is a lack of respect for diverse perspectives.

If you would like to add any comments about your experience in the consortium so far regarding **accountability, decision-making, problem-solving and conflict resolution** please use the space below.

Actions



8. Ethics and DMP

As announced in [D7.1 \(Humans\)](#) and [D7.2 \(POPD\)](#), the OTTER project evaluations will recruit participants according to the principles of privacy and freedom. This means that we will collect only data relevant to the project, ensure confidentiality in using personal data, and that participation in research and evaluation activities will be voluntary.

Participants will also be informed about the project and the implications of participating in the evaluation and research stage. Furthermore, all participants will be provided with the informed consent form in language suitable for the audience. Finally, these practices will be ensured by the internal ethics committee of the project at all stages of the evaluation of partnerships and collaborations. The project follows EU standards regarding external ethical approvals, as indicated in D7.1 and D7.2. Additionally, it has received ethics approval from the University of Groningen (CETO #85494053) and the University of Limerick.

The collection, processing, preparation, analysis, and publication of the data resulting from these evaluations will also follow the principles and actions indicated in [D1.4 Data Management Plan](#).

9. Gender Strategy

In accordance with [D4.1](#), all OTTER evaluations will follow the principles of practice set out in [D1.3 Gender Strategy](#). We explain how we are following these principles in the table below.

Principle	How is it present in the actions described and derived from this deliverable?
<i>[1] Gender is a cross-cutting theme across all dimensions of the project</i>	We are considering this principle as one of the guiding principles of WP4.
<i>[3] All research conducted throughout the project is gender-sensitive (...)</i>	Gender relevance is present in the data collection instruments, as this will also be considered in the data analysis stage.
<i>[4] (...) assessment activities (...) developed and conducted throughout the project are gender-sensitive, paying attention to the involvement and engagement of a range of genders and providing equal opportunities for all</i>	The application of our partnership and collaboration assessment tools will be conducted in such a way as to give voice to as many project participants as possible, aiming for a diversity of voices.

The impact of collaborations and partnerships on individuals with different gender identities and to identify potential biases and inequalities (e.g., differences in access to resources, labour division, power

dynamics, and gender stereotypes) will also be captured. For this purpose, we intend to work with the other work packages to engage as many participants as possible in this project stage.



Final Considerations



10. Challenges and solutions

In research, **participant fatigue** is a common issue that can negatively impact the quality of data collected. Participants may become disengaged or exhausted, resulting in less detailed or superficial responses. In our study, where we aim to evaluate collaborations and partnerships in the OTTER Lab context qualitatively, one potential solution is to use focus groups and interviews. Fostering lively discussions and encouraging participants to share their perspectives and opinions in focus groups, for example, can help maintain their interest and energy levels, leading to higher-quality data. Additionally, focus groups can enable participants to interact with each other, generating unique ideas and insights that might not arise in one-on-one interviews.

It's important to note that conducting **gender-sensitive** research can be challenging, mainly when facilitators are of only one gender. In such cases, participants might feel uncomfortable discussing intimate or sensitive gender-related issues. By creating a supportive and comfortable space, focus groups and interviews can enable participants to engage more meaningfully in gender-sensitive discussions. Additionally, having multiple participants of the same gender in a focus group can further enhance the level of comfort and support within the group.

Conducting focus groups and interviews can be challenging, especially if the research team needs to become more familiar with the methodology. In addition, participants may feel intimidated or insecure about sharing their opinions, and facilitators may require additional training to ensure the focus group/interview is productive. Our **training/workshop** will provide facilitators with the necessary tools to navigate any potential issues. This includes explaining the focus group/interview protocol, role-playing exercises to familiarise participants with group dynamics, techniques for handling sensitive situations, and approaches to ensure participants feel at ease throughout the process (see the sample training programme in Appendix 1).

It's also crucial to prepare facilitators to establish a trusting and empathetic relationship with focus group/interview participants, mainly when collecting gender-sensitive data. This can be achieved through training in communication skills, such as active listening and empathy, as well as interviewing techniques. Facilitators should also adopt a culturally sensitive and gender-aware approach, considering participants' cultural norms and beliefs. This might involve using gender-neutral language and being mindful of specific cultural practices. By providing facilitators with comprehensive training, we aim to ensure they are well-prepared to elicit valuable and meaningful information from participants.

Lastly, accurately **translating** research tools can be challenging, given linguistic and cultural differences. To ensure the validity of our findings, we will use the principles set out in ITC (2017) and implement *back translation*. This process involves translating the final version of the research tools back into the original language to ensure accuracy and consistency. We will also establish a translation committee comprising consortium members to minimise the effects of cultural and linguistic differences on participants' responses.

11. Next steps and expected results

Evaluating and monitoring partnerships and collaborations is critical to ensure the effectiveness of the OTTER outcomes. In this sense, preparing a detailed plan is crucial to establishing the indicators used. However, it is essential to note that this plan should always be open to adjustment, especially after the implementation of the pilots. This is because when the pilots are put into practice, additional issues may be identified, and it may require adjustments in the indicators used or even the creation of new indicators. Thus, this document should be seen as a living document, which can and should be adjusted according to the reality of the pilots. This **flexibility** is also essential to capture the reality of the pilots more accurately. As each partnership and collaboration has particularities, some indicators may be adjusted. However, such flexibility does not mean it will constantly change without justification. Potential changes to this plan will be made based on evidence and a broad understanding of the reality of the pilots.

Additionally, evaluating partnerships and collaborations is an essential step towards creating **accreditation** framework guidelines. The results obtained in this step will allow the identification of strengths and weaknesses of the partnerships established for the success of OTTER Labs, as well as areas for improvement. Based on this information, it will also be possible to consider criteria for improving collaboration between the formal and non-formal sectors. By establishing clear standards to assess the quality of these partnerships and collaborations, we will have more evidence to help foster a culture of cooperation and dialogue between sectors, allowing for optimising EOC activities' results.

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13. Appendix 1

Example of a 2h-training session on focus groups/interviews to be provided to the consortium partners.

Introduction (5 min)

- Welcome
- Workshop objectives and structure

Background, preparation and planning (30 min)

- Focus group/interviews definitions and characteristics
- Advantages and limitations
- Types of questions and approaches
- Participant selection and recruitment
- Schedule and Logistics

Conducting a focus group/interview (30 min)

- Focus Group/Interview conduct techniques
- Opening and introduction to the focus group/interview
- Developing the questions and discussion
- Wrapping up the focus group/interview
- Instructions for collecting gender-sensitive data
- Strategies for ensuring empathy during data collection

Practice Activities (40 min)

- Role play: simulated focus group/interview facilitation
- Case study analysis: Analysis and discussion of focus group/interview examples

Conclusion (15min)

- Review of main points covered
- Discussion of questions and concerns
- Closing and acknowledgements



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