Guidelines for assessment of applications for Erasmus accreditation in the fields of adult education, vocational education and training, and school education

This document presents the main principles to be followed by experts assessing applications for Erasmus accreditations in the fields of adult education, vocational education and training, and school education

General principles

The following guidance is additional to the overall assessment framework presented in the Erasmus+ Guide for experts on quality assessment. The main principles of that Guide remain applicable unless a different instruction is provided in these guidelines or in the Programme Guide.

The assessment scores will follow the standard pattern to indicate the level of quality:

Maximum score for a criterion	**Range of scores**			
	Very good	**Good**	**Fair**	**Weak**
40	34 - 40	28 - 33	20 - 27	0 - 19
30	26 - 30	21 - 25	15 - 20	0 - 14
20	17 - 20	14 - 16	10 - 13	0 - 9
10	9 - 10	7 - 8	5 - 6	0 - 4

At the level of overall assessment, the experts must pay particular attention to the following aspects specific to applications for Erasmus accreditation:

- **Long-term importance of the accreditation**: while the call for Erasmus accreditations does not allocate any funding, the approval of the accreditation allows successful applicants to access funding over a long period of time, and potentially for a large total sum. The quality of applications should be assessed accordingly, with special attention given to parts of the application that have long-term implications, such as the objectives of the Erasmus Plan.

- **Careful consideration of the overall quality threshold:** the minimum score for each award criterion is set at 50% of the points allocated to that criterion. However, to be considered for approval, an application must also score at least 70/100 points in total. In particular, the three sections of the application form covering the Erasmus Plan must show interconnectedness, coherence and synergy. Before concluding their assessment positively, experts must determine if the applicant has managed to demonstrate a clear and holistic vision for the development of their organisation, as opposed to only addressing the questions one by one.

- **Proportionality, contextualisation and non-discrimination:** in line with the award criteria, experts must assess each application and the proposed Erasmus Plan on its own merits, internal consistency and appropriateness for the applicant organisation.

As a matter of proportionality, experts assess applications based on the unique characteristics and context of each applicant, rather than making direct comparison of applications submitted by organisations with different profiles. A similar Erasmus Plan presented by two very different organisations should not necessarily yield the same score.

In particular, experts must not introduce criteria or interpretations that are not stated in the Programme Guide or in these guidelines. For example, the amount of previous experience in the programme, the organisation's size, duration of the Erasmus Plan, estimated number of participants and the number of objectives are aspects that should be considered with caution. Experts must pay attention not to apply an over-simplified 'more is better' bias: for example, more numerous objectives cannot automatically translate into a better score.

Rather, experts must take into account the organisation's context and the entire content of the application when considering any of the above-mentioned aspects. A good application will demonstrate self-awareness on part of the applicant, with a realistic outlook about their own capacity, resources and experience.

It is particularly important to prevent any discrimination against smaller organisations or those with lesser pre-existing capacity. By defining a few well-targeted objectives over the first two to three years of implementation, such organisations may propose plans with very high added value for their own development that can lead to gradual build-up of capacity and competences. Conversely, organisations with higher pre-existing experience and capacity must be able to demonstrate not just the simple existence of such experience and capacity, but their ability to use Programme funds to improve future activities and themselves as organisations.

- **Importance of application type:** applicants can apply as an individual organisation or as a mobility consortium coordinator. The type of application is stated in the first section of the application form. In case of consortia, the purpose of the consortium is further specified in the section 'Background'. Experts must keep in mind the type of the application throughout the assessment as it is a major element shaping the context for the proposed Erasmus Plan.

- **Recognising original, convincing and genuine proposals:** experts should consider the information presented in the application form critically to evaluate if it shows a real self-reflection on the part of the applicant, if it is rooted in reality of everyday educational work and if the links being established with European or national policy narratives are concrete and tangible.

- **Consequences of the evaluation score:** the evaluation score will be used in budget allocation formulas when the approved applicants apply for funding. Before finalising the assessment, experts therefore must make sure to carefully fine-tune the scoring to reflect the quality of the application as precisely as possible.

- **Dealing with insufficient, irrelevant or poorly structured information:** to assess the application correctly, experts will require contextual information that they must find in the application form. Applications may be scored lower if the provided answers contain insufficient information, if the included information is vague, poorly explained or not

relevant, or if an overwhelming amount of unstructured, inappropriately presented information is included (for example, by adding annexes without interpreting and explaining the relevance of their content).

The maximum length of replies in the application form is deliberately limited, so applicants must demonstrate their ability to select the most pertinent information and present it effectively. Applicants may include annexes with their application; however, these annexes must comply with the instructions provided in the application form. Specifically, as a matter of equal treatment of all applicants, annexes cannot be used to provide longer answers to the same questions as contained in the application form. If the experts conclude that this is the main purpose of an annex, the annex in question shall be disregarded.

Relevance (10 points)

Relevance **Maximum 10 points**	The extent to which: ▪ the applicant's profile, experience, activities and target population of learners are relevant for the field of the application, the objectives of Erasmus accreditations, and the type of application (individual organisation or a consortium coordinator) ▪ the proposal is relevant for 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 sort of discrimination ▪ in addition, for organisations applying to become accredited consortium coordinators: – the profile of the planned consortium members is relevant for the purpose and objectives of the consortium as defined in the application, for the field of the application and the objectives of Erasmus accreditations – the creation of the consortium brings a clear added value for its members in terms of the objectives of Erasmus accreditations

The purpose of the relevance criterion is to make sure that the award of the accreditation to the applicant organisation actually contributes to the achievement of the general and field-specific objectives of the Call. For this purpose, the experts shall consider primarily the information in the section 'Background' and analyse to what extent the organisation is rooted in the field of education where it is applying.

When assessing the ability of the organisation to contribute to the objectives of the Call, the experts must carefully take into account the profiles of learners the applicant organisation is working with. This aspect is particularly important in the field of adult education given the diversity of potential target groups and the specific objectives for the field.

Experts should also consider if the chosen type of application (individual organisation or a consortium) is optimal for the organisation to contribute to the achievement of the objectives of the Call, given the profile of the organisation itself.

In case of a mobility consortium, the experts should carefully consider the profile of the planned member organisations, the dynamic of their current and future relationship with the coordinator, and the added value of the consortium for the member organisations. In line with the Call objectives and the Erasmus quality standards, the relationship between the accredited

coordinator organisation and the potential members must be based on a cooperative, non-profit basis. In case of doubt, experts may seek advice of the National Agency about the eligibility of described potential member organisations.

The expert should assess that the accreditation objectives align with the EU values. The following factors could be taken into consideration during the assessment:

- Examine whether the proposal references and integrates EU values into its objectives, methodologies, and expected outcomes. A clear articulation that the project supports and advances these values would be an additional strength;

- Ensure that the objectives are designed with a non-discriminatory approach to benefit a diverse range of participants and avoid any form of discrimination based on gender, ethnicity, disability, or any other relevant criterion;

- Consider the presence of educational components that aim to enhance participants' understanding and appreciation of EU values.

The 10-point maximum score for the relevance criterion means that experts must be strict in their assessment of this criterion. Even if the other parts of the assessment show that the proposed Erasmus Plan is technically well-written and logically sound, experts must remain aware of the long-term importance of the accreditation. Consequently, applications whose relevance for the field and the Call is questionable may not reach the quality threshold (50% of the points) for the relevance criterion.

Erasmus Plan: Objectives (40 points)

Erasmus Plan: Objectives **Maximum 40 points**	The extent to which: ▪ the proposed Erasmus Plan is in line with the objectives of Erasmus accreditations ▪ the proposed Erasmus Plan objectives address the needs of the applicant, its staff and learners in a clear and concrete way – for consortium coordinators, this criterion applies to the entire planned consortium and requires the Erasmus Plan objectives to be coherent with the purpose of the consortium as defined in the application ▪ the proposed Erasmus Plan objectives and their timing are realistic and sufficiently ambitious to achieve a positive impact for the organisation (or the consortium) ▪ the proposed measures for tracking and evaluating the progress of the Erasmus Plan objectives are appropriate and concrete ▪ if the applicant has attached strategic documents to their application: there is a clear explanation of the link between the proposed Erasmus Plan and included documents

This award criterion carries the largest part of the assessment with 40 out of 100 points. The large number of points reflects the complexity of the criterion and the wide variation in quality that experts may encounter. Experts should make full use of the 40 points scale to fine-tune their assessment and differentiate applications according to their level of quality.

As defined in the award criteria, the Erasmus Plan objectives need to achieve a balance between being realistic and at the same time ambitious enough to achieve impact. This

element is strongly linked with the concept of proportionality, as explained under 'General principles'. Therefore, this award criterion should be assessed by taking into account the context described in the entire application, not only the content of the section 'Erasmus Plan: Objectives'.

Each objective must be clear and concrete enough to be implementable and traceable. Experts must pay particular attention to how the applicant proposes to track and evaluate the progress of each objective, making sure that it will be possible for the organisation itself and for the National Agency to follow-up on these commitments in the future.

If the accreditation is approved, the Erasmus Plan objectives will serve as a crucial component of evaluation criteria for projects implemented under the accreditation. Therefore, experts must make sure that the approved Erasmus Plan and its objectives are fit for this purpose. If the application contains any objectives that are severely lacking in clarity, are impossible to track and evaluate, or are clearly irrelevant for the Call or the field of application, then the expert must assess the proposal to be below the minimum threshold for this award criterion.

Erasmus Plan: Activities (20 points)

Erasmus Plan: Activities **Maximum 20 points**	The extent to which: ▪ the proposed number of participants in mobility activities is proportional to the applicant organisation's size and experience – for consortium coordinators, the planned size of the consortium will be taken into account ▪ the proposed number of participants in mobility activities is realistic and appropriate for the objectives set in the Erasmus Plan ▪ the profiles of planned participants are relevant to the field of the application, the proposed Erasmus Plan, and the objectives of Erasmus accreditations ▪ where relevant and if the applicant is planning to organise mobility activities for learners: involvement of participants with fewer opportunities

Proposed mobility activities represent the means to achieve the objectives proposed as part of the Erasmus Plan. Therefore, the main aspect of assessing this award criterion is to compare the proposed number of participants with information presented in other parts of the form: with the size and profile of the organisation, with the Erasmus Plan objectives, and with the management arrangements. Similarly, the experts need to evaluate the extent to which the participants' profiles are appropriate to achieve the objectives of the Erasmus Plan.

As explained under 'General principles', the assessment must be well-contextualised and there is therefore no automatic advantage in proposing lower or higher estimated number of participants. The most appropriate proposal will depend on the content of the application itself. Since the numbers of participants are broad estimations, experts should not look for minute differences in possible level of participation, but should focus on detecting any systemic issues, particularly when it comes to significantly exaggerated numbers of participants.

The experts should also consider trends in the estimated number of yearly mobility activities over time. The time dimension is especially important for organisations with less experience in the Programme that may require a learning period at the start of implementation.

In the field of school education, the experts should pay close attention to applications by organisations that are not education providers. Such organisations may not apply for activities of learners unless they are applying as a mobility consortium coordinator. If the applicant makes a mistake of including such activities, the experts shall indicate them for removal from the Erasmus Plan.

Erasmus Plan: Management (30 points)

Erasmus Plan: Management **Maximum 30 points**	The extent to which: ▪ the applicant has proposed concrete ways of contributing to the basic principles of the Erasmus accreditation described in the Erasmus quality standards ▪ the applicant has proposed a clear and complete allocation of tasks in line with the Erasmus quality standards ▪ the applicant has allocated appropriate resources to manage the Programme activities in accordance with the Erasmus quality standards ▪ there is appropriate involvement at the level of organisation's management ▪ appropriate measures have been defined to ensure continuity of programme activities in case of changes in the staff or management of the applicant organisation ▪ the applicant has proposed concrete and logical steps to integrate the results of their mobility activities in the organisation's regular work – for consortium coordinators, this criterion applies to the entire planned consortium

Together with Relevance, the award criterion on Management underlines the horizontal principles and quality requirements of Erasmus+. The main purpose of this criterion is to determine if and how applicants have taken into account the Erasmus quality standards in preparation of their application and if they have put in place resource planning that will allow them to achieve their Erasmus Plan objectives while respecting those standards.

The key quality to look for in the application is the inclusion of concrete measures that have a realistic chance of being operationalised if the accreditation is approved. The applicant should also show awareness of the obligations they are taking up and willingness to commit to those obligations, to the extent this is possible in their planning timeframe.

Experts should pay particular attention to proportional assessment, as different organisations will have different levels of resources to commit. As with other aspects of the application, the experts must not make their judgment based on the absolute level of the committed resources, but need to take into account the applicant's objectives and the estimated number of mobility participants.

Experts should also evaluate the reliability of the commitments made by the applicant, based on the reasoning in the application form and the level of involvement of the organisation's leadership.

Experts recommendations

Experts can recommend improvements to the Erasmus Plan. These recommendations will be reviewed by the National Agency and communicated to the applicant. In case the application is approved, the accredited organisation will have the responsibility to decide how to best implement such recommendations during implementation.