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FAMT&L
Formative Assessment in Mathematics for Teaching and Learning

Work Package 1 – Project Management

Deliverable D1.6 – Sustainability Plan

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Executive summary

This document outlines the methods and instruments which might continue beyond the project's life, including the impact and continued initiatives to achieve educational agency change. The use of project results and intellectual property issues; feasibility of continuing network activities, including budgetary considerations and further work which needs to be done in the field, including ideas for possible future collaborations/projects

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1. Introduction

This deliverable is about planning sustainability. One of the core aims of the FAMT&L project is the development of a sustainable plan and this deliverable will therefore identify the cornerstones for sustainability and design a road map for its consolidation.

This deliverable is one of the two “planning deliverables” that has been outlined in the application text. Together with D6.2: Evaluation reports & peer reviews, it was written to help the development of constructive forward thinking in the project.

Nevertheless the two deliverables have a different focus:

D1.6. The plan will identify all issues which might continue beyond the project's life, considering both the budgetary aspects and the needs of future work and development.

D6.2 InHolland will report on the progress made during the lifetime of the project towards a sustainable impact. The subcontracted auditor/evaluator will provide external and independent advice on the project's progress.

In particular this deliverable will identify the resources inside and outside the current consortium and reflect on how these could be geared towards higher outcomes.

2. End goal

“At the end of the project we will have created a training course on formative assessment in math in order to enhance learning and teaching.”

The “raison d’être” of the consortium is its contribution to enhancing learning and teaching in math, through well-developed tools and methods for formative assessment. Hence, differently from other projects and researches, we focus on how formative assessment can be productively used in teaching mathematics (and not on how to find “better ways to explain mathematics”).

The structure of such a course should be given by a web repository, where videos, notes, examples (both of advised practices and of “bad ones”) and other materials, will be stored. Of course such a repository should remain in service well after the end of the project, and possibly continue to accumulate material and extend its dissemination function.

3. Needs

Based on what is written above and on principles at the basis of any logic of intervention, we could say that the consortium should **consciously** use “**resources**” to obtain “**results**” that contribute to reach certain “**goals**”.

3.1. Operational strategy

How the goals should be achieved, is outlined in the **operational strategy** of a permanent or temporary organization. There are many different ways of reaching goals, some more effective than others. The operational strategy should identify short and midterm goals and expected results and **activities** to reach them. Having such a strategy will give the network self consciousness, governance, operational strength, a higher credibility and increase its effectiveness.

Recommendation 1: The project consortium should write an operational strategy by M24.

3.2. Governance

One of the main assets of the *FAMT&L* project is its strong relationship with the several national groups that are at its cradle. They should therefore reflect on how to give stable governance to the network once the project is over, and also extend it to other groups in Europe. The leadership of the project consortium, assumed by the Bologna node, is functional for the project; after the end date of the project itself will be the host of the repository and should have mainly a coordinating role.

Of course other forms of governance are imaginable. It is also thinkable that the network remains informal after the 3 years' period of that any decision about its identity is postponed.

Recommendation 2: The consortium should try to decide by M24 the future configuration of the FAMT&L project and prepare for configuring future governance after M36.

3.3. Resources

In order to obtain results the network should commit resources. These resources can be of different nature:

- Human resources
- Financial resources
- Intangible resources, such as intellectual property, knowledge, but also leadership, reputation, credibility, etc.

3.3.1. Human resources

Human resources committed to the project could be paid or unpaid work of network members or external consultants. What will start as a network based on the voluntary contribution of the members and the work of people in some postdoc positions, payed by the project's funds, might, in time, develop towards forms of dedicated and centrally directed employment (this is an issue that has to be considered by the end of the project).

Various models are thinkable, from the umbrella organizations dedicating staff time to keep the network going, to project financing that will allow the network to perform certain activities.

3.3.2. Financial resources

Generally speaking the following sources of income could be identified:

- Fees for services

Fee for services are probably an interesting form of financing the activities of the project as there is a direct link between the resources committed and income. Fees for institutions that will make use of the repository material (or part of it which will not be made directly accessible) could help to finance the project future activities, as workshops, statistics work, production of other material for the repository itself. The obvious question is who should pay the fees: schools, teaching agencies, individual users.

- Income related to projects

The project members, due to their different nature and geographical spread have interesting opportunities to develop European projects, especially in the area of lifelong learning. Where the members act within the framework of the network and decide to

enhance the network as an opportunity for mainstreaming their results, project income could become an important source of funding.

- Donations and sponsorship

Donations are interesting source of funding that can be activated since the network has a clear “non for profit” profile and a high level mission focused on the development of formative assessment. Editors (also through collaboration work) and public institutions could be a target for donations and sponsorship.

- Structural funding through the partners' institutions

When results are clear and the added value of the project is demonstrated, structural funding could be sought with the participating universities or with foundations having similar goals. Obtaining structural funding is long term goal.

- Funding based on collaboration with other activities and projects of the members

The FAMT&L project offers an important opportunity for dissemination. As such it could provide services to other projects of the universities or schools which are members of the project or which could start a collaboration with the present network. The network itself could also benefit from work done in other projects, such as sharing costs with other conferences, seminars, etc.

What follows is an estimation of the costs for keeping FAMT&L alive after the project financing is over. It is based on a minimum set of activities including:

- Web site maintenance
- A mail distribution system or social network account with moderator
- One governance meeting
- One annual international seminar
- One publication (typically the outcomes of the seminar)
- Three dissemination meetings with key people in European Institutions
- A secretariat function

A related estimated budget could be the following:

3.3.3. Intangible resources – Intellectual Property

Where the use of tangible and financial resources is pretty much evident and governable, the commitment of intangible resources is less measurable. What is the value of intellectual property? Or even trickier, what is the value of a brand? These assets probably could not be part of the economic activity of the network, as they belong to a different sphere where “protection” and “integrity” are higher values than money.

Intellectual Property developed in the network by any of the network members or already developed and brought in the network as example of good practice, will be protected in accordance with the EC law and will cover the text and illustrations. Each author remains the copyright holder for his or her contribution - this may be a text, a design, software or a concept of material or media of transmission.

Copyrights will be strictly safeguarded, permission for reproduction and scale of reproduction have to be settled beforehand.

Where network members develop material within the scope of the network and for the benefit of the members, this material will be available for the network members as a means within the common goals set in the partnership. This material might be quoted for free and referred to extensively within the range of collective product. It can also be disseminated and delivered without any further notice and permission.

The collective project products will comprise findings, secondary research work, gathering and sampling of data, and the guidelines for various fields of good practice they might be reused as extracts by any network member in any context as long as they are clearly identified as stemming from the FAMT&L project and as long as all copyright matters are seen to.

Where project members have the intention of adapting and reusing parts of the collective material or translate the material in any other language, they are free to do it, with the exception of materials explicitly covered copyright, for which they have to obtain permission from the individual copyright holders.

Recommendation 3: The consortium should adopt as soon as possible, but before the end of year 2, an IPR agreement.

3.4. Alliances

The network should develop a precise strategy of alliances at European and global level. This can be done by identifying key stakeholders and involve them actively in the project. Common grounds of interest and common goals have to be identified with each of these organizations:

- European School Heads Association

An active policy of alliances will increase the project's impact and visibility.

Recommendation 4: The consortium should adopt a permanent outreach strategy to other organizations and initiatives.

4. Activities

The following table gives an overview of the activities of the project and an analysis of the conditions that have to be met to keep them sustainable. The last column estimates the annual workload.

Activity	Conditions	Workload
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Information sharing

FAMT&L Repository Web site The Repository Web site will be a valuable tool for the dissemination of reports, good practices, project deliverables and is the main goal of the project and also for its future activities. 30 h. for technical website maintenance and 50h ?? for revision and development.

FAMT&L workshops Workshops and seminars meet interest of audience and lead to useful results. Seminars could not necessarily be stand alone, but might also become side events of larger conferences, or be delivered on line. ? High.

Policy development

FAMT&L Observatory function of good practice The project repository should manage to become the “shopwindow” for the dissemination of good formative assessment. Interested organizations provide the information. Content development is done by teachers and researchers following precise guidelines. 100 h. yearly for keeping filtering the database and keeping it update.

5. Research agenda

The *FAMT&L* network should focus attention to cutting edge innovative themes in formative assessment in order to be attractive for a wide range of schools, teachers and researchers. Innovation could regard:

- Technologies
- Pedagogies
- Models of intervention
- Assessment strategies
- Others.....

6. Conclusions

It is part of the ambition of the *FAMT&L* project to make a contribution to the development of strategies that enhance the use, awareness and development of formative assessment in the teaching of mathematics. In order to be able to do that the main goal is the creation of a web repository that should be one of the reference points in Europe in this field. The project members should also aim at creating a sustainable network that allows the circulation of information and also the writing of state of the art reports. Other activities can be implemented on an “as needs” basis, but at least the basic function as “observer” and “knowledge hub”, being a backbone, should be safeguarded and made sustainable also after M36 of the project.