



**Financial Technology and digital innovation to modernise and develop curricula of Vietnamese and Philippines Universities**

Project No 610256-EPP-1-2019-1-IT-EPPKA2-CBHE-JP

**DEV 5.1**  
**QUALITY ASSURANCE &**  
**EVALUATION PLAN**



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<b>March 26,2021</b>	2	Change of the leadership of the WP6 moved from P11 Ho Chi Minh City Open University to P8 Fintech Philippines Association (page 13)

#### Disclaimer

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## Remark

Considering the situation provoked with spreading **pandemic of COVID 19**, from December 2019 in Asia and from January 2020 in Europe, and all negative consequences which were reflected on all levels of society Kick-off meeting of TRUST project that has been scheduled for March 11-14, 2020 in London, at the Glasgow Caledonian University was cancelled. Therefore, Kick off meeting has been organized on-line, that is in line with recommendations of EACEA during April 2020 by schedule:

Session 1 Fin-Tech Industry/Software - Master Accreditation: 3 April 2020 - 9:30 – 11:30 (CET Time), 15.30 – 17.30 (Vietnam), 16.30 – 18.30 (Philippine)

Session 2 Administrative - Financial Arrangement: 7 April 2020 - 9:30 – 11:30 (CET Time), 15.30 – 17.30 (Vietnam), 16.30 – 18.30 (Philippine)

Session 3 WP1 (Research) - WP5 Quality - WP6 Dissemination: 10 April 2020 - 9:30 – 11:30 (CET Time), 15.30 – 17.30 (Vietnam), 16.30 – 18.30 (Philippine)

Quality assurance and Evaluation plan was prepared according to time framework and delivered to the project coordinator till February 28, 2020.

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## 1. Abstract

The “Quality Assurance and Evaluation Plan” of TRUST ERASMUS+ Project” (hereinafter only Plan) is a deliverable within WP.5 entitled “Quality Assurance & Evaluation Plan” of the TRUST project (“Financial Technology and digital innovation to modeRnise and develop cUrrricula of VietnameSe and Philippines UniversiTies”). The contents and structure of the Plan is developed in line with the TRUST project structure and work plan, keeping in mind that the newest experience and the practice of Quality Assurance and Evaluation of EU projects is incorporated in, particularly the experience of recent ERASMUS+ where the University of Belgrade, is a leading partner of this WP.5 served as project leader.

The plan outlines the main definitions related to quality management. It defines processes for planning and executing the project activities in order to ensure the highest possible quality. In this Plan minimum principle, requirements and processes needed to implement an effective quality assurance and control is proposed, with the aim to ensure smooth and responsible project management, in line with the proposed Work plan, activities and goals of this project. It also provides six templates as appendixes on this Plan.

## 2. Introduction

According to the TRUST project application, the University of Belgrade, as the Lead Partner responsible for implementation of Work Package 5 – Quality Assurance and Evaluation Plan, has prepared in collaboration with the project coordinator, the Università degli Studi Guglielmo Marconi.

The outline will be presented to the Consortia Project management members and all partner institutions in order to receive the feedback from all partner institutions during Kick off that will be organized in London, at the Glasgow Caledonian University. Finalized version will be adopted by the members of Steering Committee and uploaded on the TRUST project website.

This outline builds on the description provided in the project application. As foreseen by the application, the Quality Assurance and Evaluation Plan will consist of internal and external quality assurance components. In that context, this Plan is outlined to serve as a quality assurance manual defining the procedures and guidelines for securing quality of the TRUST project management and deliverables. Moreover, this Quality Assurance and Evaluation Plan goes deeper and defines quality expectations regarding the project outputs by providing the guidelines and templates that will facilitate the producing of good quality deliverables and smooth TRUST Project management (WP7).

This outline builds on the description provided in the project application. As foreseen by the application, the Quality Assurance and Evaluation Plan is envisaged to consist of internal and external components. The combination of internal and external view on the project is expected to provide a useful input in the process of securing quality of the TRUST project.

### 2.1. Aims of the TRUST project

TRUST aims to improve the quality of the higher education in VN and PH in FINancial TECHnology and digital innovation-FINTHECH to answer to the emergent workforce need of the future Financial Services industry. Specific objectives of the project are:

- (S1) designing and developing of a master on FINancial TECHnology and digital innovation (FINTHECH) in VN & PH Universities;
- (S2) modernizing of other masters of Business and Economics with specific contents on FINancial TECHnology in VN & PH Universities.

The 4° Industrial Revolution global transformation is also transforming the Financial Sector due to the technology invasion. The HE in EU and in the world are trying to tackle to this

revolution too. Several educational programmes are born on FinTech but there aren't any feedback on their results or impact. TRUST project for the first time merges EU and South Asian HEIs and enterprises of the Financial Services Sector/FinTech startups to promote the HE modernization, curriculum development and improvement of quality of HE in the Partner Countries, enhancing its relevance for the Financial Services labor market. The modernization of the HE programmes on FINTECH in VN and PH will answer the partner countries needs of the HE in that field by filling the gap between the labor that Financial Market emergent needs and the HE offers that have to answer these needs. To this aim the collaboration with the financial services sector/FinTech startups is essential too. These objectives answer each HEI aim to improve the educational offer on the FinTech topic to be ready and competitive in the financial labor Market of each partner country.

## 2.2. Partner Country VIETNAM

Despite a low rate of access to formal financial institutions, the banking sector in Vietnam has witnessed a revolution. However, more than 90% of payments remain cash-based. In Vietnam there is no HE programs offering subjects in Fintech yet. Some institutions and universities have cooperated with foreign HEIs offering master programs in finance and Fintech in which foreign universities will grant the degrees.

TRUST project answers the needs of each target group that have to tackle this financial revolution by preparing the future task force of employers. In detail TRUST project allows:

- to improve HEIs students' knowledge and skills on FinTech topics in Vietnam to be ready to work on the emergent financial services sector and by increasing new graduated employability chance;
- to prepare and equipped HEIs professors/researchers/HEIs staff in Vietnam with the needed knowledge and skills on FinTech to be able to prepare their own students;
- to increase the university-business cooperation in particular among enterprises' staff/managers of the Financial Services Sector and/or FinTech Startups/IT companies in Vietnam.

To reach these objectives the partnership also includes the Philippine Association of FinTech that will contribute to the project by providing essential feedbacks for the mapping of the labor market needs of the Financial Services Sector in Vietnam, by participating in the designing and development of the master programmes, as well as by participating the implementation of the master programmes as lectures of the specific contents bringing their practical experiences and projects, and they will also host selected students of the Master in FinTech to undertake a practical experience.



USGM and the HEIs of each partner country has already had the chance to contact the Vietnamese Ministry of Education and Training (MOET) presenting the project and master programmes in FinTech expressing its interest in the project by participating as associated partner. This will facilitate the further relationship among universities and the public body to get accreditation as well as to get the project overall feedback and suggestions for its sustainability.

Besides, each VN HEIs have already identified the masters to be updated with FinTech contents to guarantee the further project implementation at institutional level, as follow: University of Economics and Business of VIETNAM NATIONAL UNIVERSITY (VNU): Master of Banking and Finance (64 ECTS); Master of Financial Institution Management (69 ECTS), Master in Financial Technology (60ECTS). College of economics (HCE): Master of Business Administration (120 ECTS); Master of Economic Management (120 ECTS). Ho Chi Minh City Open University (HCMCOU): Master in Finance and Banking (60 ECTS); MA in computer science (60 ECTS).

The project objectives will be also reached thanks to the high qualified training-WP3. At least 60 professors/HEIs staff will be trained in Vietnam by participating to both workshops (study visits in VN and PH) and on line training. Also experts of Fintech companies will participate to the study visits in partner countries to provide its expertise on the FinTech needs.

### 2.3. Partner Country PHILIPPINES

In the Philippines only 4% of all transactions are made online, leaving considerable growth opportunities. With the entry of FinTech players, however, customers are switching to digital solutions. In the Philippines only two masters exist on similar topics.

In particular TRUS project answer the needs of each specific target group that have to tackle this financial revolution by preparing the future task force of employers. In detail TRAST project allows:

- to improve HEIs students knowledge and skills on FinTech topics/ technological innovations in the Philippines to be ready to work on the emergent financial services sector and by increasing new graduated employability chance;
- to prepare and equipped HEIs professors and researchers and other universities' staff in the Philippines with the needed knowledge and skills on FinTech to be able prepare their own students;
- to increase the university-business cooperation in particular among enterprises'

staff/managers of the Financial Services Sector and/or FinTech Startups/IT companies in the Philippines.

To reach these objectives the partnership also includes four FINTECH Start-ups/IT companies as associated partners that will contribute to the project during the entire project duration by providing essential feedbacks for the mapping of the labour market needs of the Financial Services Sector in Vietnam, by participating in the designing and development of the master programmes, as well as by participating the implementation of the master programmes as lectures of the specific contents bringing their practical experiences and projects, and they will also host selected students of the Master in FinTech to undertake a practical experience.

USGM and the universities in each partner country has already had the chance to contact the Philippine Commission on HE (CHED) presenting the project and master programmes in FinTech expressing its interest in the project by participating as associated partner. This will facilitate the further relationship among universities and the public body to get accreditation and to get the project overall feedback and suggestions for its sustainability.

The project objectives will be also reached thanks to the high qualified training during the WP3. At least 60 professors/HEIs staff will be trained in the Philippines by participating to both workshops (study visits in VN and PH) & on line training. Experts of Fintech companies will participate to the study visits in partner countries to provide its expertise on FinTech.

### 3. Quality of project expectations

The present chapter presents the expectations of the project consortium with reference to the TRUST deliverables and activities as well as the expectations relevant to the project management.

#### 3.1. Quality of project deliverables

The deliverables of TRUST may be classified into tangible deliverables such as reports, publications, manuals, methodology, plans, printed and electronically available promotional material, media articles as well as intangible deliverables in the form of organized events (trainings, study visits, coordination meetings, conference calls, monitoring visits, etc.), developed and launched project web site, social media, etc.

A common quality expectation for all deliverables is their relevance to reach the overall objective and the specific objectives, with a further focus on their development in an efficient and effective manner. Timely delivery following the project work plan as identified in the Application Form and Project Work plane (modified and agreed by the SC periodically) is expected.

#### 3.2. Quality of document based deliverables

A consistent and common format for all document based deliverables (word document, power point presentations) is to be followed by all partners using templates provided within this Plan:

- ✓ Appendix 1 – TRUST document template
- ✓ Appendix 2 – TRUST Power point presentation template
- ✓ Appendix 3 – TRUST Event attendance list - template
- ✓ Appendix 4 – TRUST Event evaluation form - example
- ✓ Appendix 5 - TRUST Risk register

All templates are adopted by the Project management leaders of Consortium that is Steering Committee members, in order to ensure a common appearance of deliverables as well as to ensure that a minimum amount of information will appear consistently in all documents produced by the project. This is not relevant to deliverables that by their nature need to have a different format (i.e. promotional products, on-line community, arranging dissemination and exploitation events).

When partners produce studies and publications as deliverable, they are obliged to put Erasmus+ logo consisting of sentence “Co-funded by Erasmus+ Programme of the European Union” on the cover or the first page. Moreover, they must use following disclaimer on the inner pages: „*This project has been funded with support from the European Commission. This publication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained here in.*”

### 3.3. Quality of organization of TRUST events

All events organized by project partners, during the course of the project should be organized professionally. The organizers should provide in due time a full information package to the participants including the draft agenda, study visit guide or a note on the logistics (informing about travel arrangements, venue, suggested hotels, etc.). Time for preparation activities depends on the type of event e.g. several months for study visits or conference and several weeks for trainings. This obligation is defined as a separate task for host institution/partner.

The meeting organizers ensure smooth registration processes (including event attendances list – Appendix 3) and the implementation of the meetings respecting appropriate time for event sessions and breaks as well as the availability of all necessary materials (e.g. meetings, training and promotional material). The organizers will also ensure the recording of minutes of the meetings in a concise style including a list of action points. Where appropriate (e.g. for trainings) also feedback forms will be distributed among participants (Appendix 4 – Event evaluation form) and event reports related to feedback forms will be prepared by responsible partner (UB). Power point presentation should be prepared using appropriate template (Appendix 2 - TRUST Power point presentation template). All prepared documents by project partners will be prepared on project designed document template (Appendix 1 – TRUST document template).

Based on obligations of the beneficiaries defined in article I.10.8 and II.7, related to information requirements, the partners shall inform the public, press and media (internet included) of the event which must visibly indicate “Co-funded by the Erasmus+ Programme of the European Union” as well as the graphic logos of the project and Erasmus+ Programme.

Promotional materials shall be displayed during the event.

### 3.4. Quality of promotional materials

Communication and dissemination activities of the project will adhere to the Dissemination and Sustainability Plan (WP6) of the project. All promotional materials will reflect the visual identity of the project and the Erasmus+ Programme.

The partner institution, Ho Chi Minh City Open University (HCMCOU) is responsible for design and distribution of all promotional material. The draft version will be sent to all partners for comments and suggestions, before printing, publishing and distribution. The materials will be disseminated by all project partners at events which are relevant to reach the project's target group.

### 3.5. Quality of the project websites and other electronic media

The project envisages setting up the public part of TRUST website <https://www.trustproject.eu>. The consortium has decided to use Google drive for file storage and sharing. The drive can be accessed here: <https://drive.google.com/drive/folders/1DLBJc9fjuWKG4S6L6Q7Lvt1IS40aPff>. All partners were added to the project drive. Google drive will be used for sharing working documents, project management information and working documents of deliverables.

HCMCOU & USGM will jointly set up and maintain the TRUST project web site.

Moreover, Facebook, LinkedIn, Twitter pages – either in the form of the fan page, will be established, in order to ensure project's visibility in the social media sphere. All representation tools will be continuously updated by the partners and are intended to effectively communicate activities and the results of the project. HCMCOU, in collaboration with USGM, will be responsible for setting up and maintaining the TRUST website and the Facebook, LinkedIn, Twitter pages with all information and materials received from project partners.

Moreover, all partners are asked to promote TRUST project on their websites and other electronic tools (such as: Facebook, Instagram, Research Gate and LinkedIn profiles/groups, Newsletters, and other media etc.) by providing short description of the project, logo, project events and link to TRUST website.

All tools will be implemented with high performance, good functionality and stability, emphasizing the maximum reach and awareness of the target audience.

**Remark:** From 1st of April 2021 the leadership tasks of the WP6 Dissemination and Exploitation moved from P11 Ho Chi Minh City Open University to P8 Fintech Philippines Association as agreed with the EACEA project officer. To this purpose a small part of the budget from P11 to P8 (in particular the staff efforts of the Dissemination and Exploitation

tasks are reduced). So, among others tasks, the Fintech Philippines Association will be responsible of the TRUST website maintenance with an ongoing updating of contents and an overall graphic / structure improving, and TRUST social networks ongoing updating and management.

### 3.6. Quality of Project Management

The project management structure should be established at the project's Kick-off meeting to ensure effectiveness, decisiveness, flexibility and quality of work.

The project Decision Making Structure includes (together with the project coordinator) as internal decisional and control organisms the **Steering Committee (SC)** and **WP Leaders (WPL)**.

**Project Management Team (PMT)** is formed from:

- Project Management Leader (and its Deputy if necessary),
- Steering Committee Representative, and its Deputy,
- Project Secretary/ administrative staff (and its Deputy if necessary), and
- Researchers / teachers.

The Project Management Team will be responsible for ensuring implementation of the project activities in order to achieve the project's objectives. Project Secretaries /administrative staff are responsible for administrative part of the project and preparation of internal reporting. Each partner is equally and independently responsible for assigned activities, money use and reporting to the **Project Management Leader**, that has responsibility for the local management.

**The Steering Committee Representatives** from all partner institutions will review the activities and decide on any necessary contingency measures in reorganization tasks and resources – as usual with a strong focus on the project impact. It is recommendable that is the Steering Committee member of each partner institution someone who is Rector, Vice rector, dean, director of the institution due to of influence in contracting or overtaking responsibilities on behalf of Consortia partner institution assignments defined by TRUST ERASMUS+ project.

In collaboration with the SC the **Quality Assurance & Evaluation Team (QA&ET)** is in charge of monitoring the project progress and assure the products and process evaluation.

## 4. General Project Guidelines

TRUST will follow all relevant project guidelines and respect the requirements of the programme. Apart from the Quality Assurance and Evaluation Plan at hand, the reference documents include:

- ✓ ERASMUS+ - Program Guidelines for the Use of Grants
- ✓ EACEA – TRUST project Grant Agreement
- ✓ TRUST - Project Partnership Agreements
- ✓ TRUST - Quality Assurance & Evaluation Plan
- ✓ TRUST- Management Handbook
- ✓ TRUST - Dissemination and exploitation plan
- ✓ TRUST - Project Work plan

All required documents and guidelines will be available for all partners at the TRUST Drive folder <https://drive.google.com/drive/folders/1DLBJc9fjuWKG4S6L6Q7Lvt11IS40aPff>.

The procedures in this Plan can be amended by agreement of all partners or by a decision taken by the project's Project managers and Steering Committee (SC). Any new version will be communicated to all the partners and takes effect 15 calendar days after this communication.

## 5. Strategy of Internal evaluation

Internal monitoring will be carried out by all partners, including previously established documents and instruments for self-evaluation such as they are: LFM, Work plan, budget and cash flow tables, Steering Committee and project meetings, monitoring visits. The TRUST Drive folder will also be used for monitoring of project activities.

### 5.1. Project Quality Assurance Strategy

The quality assurance strategy of TRUST ERASMUS+ project includes four levels of quality assurance:

- (1) Project management level,
- (2) Coordinator level,
- (3) Steering Committee level and
- (4) Final approval by Authority.

#### 5.1.1. Project management level

The 1<sup>st</sup> level corresponds to the activity level and relay on self-assessment by responsible Project management leader and his/her team. The presentation of deliverables and activities of the project are a joint responsibility of the associated Project management and his/her team, as well all partners involved in the activity. It shall guarantee the quality and timeliness of the deliverable as identified in Application Form and action plan (modified and agreed by the Steering Committee periodically basis if is needed). Project leader responsible for Quality Assurance and Evaluation Plan implementation will send reminders on specific assignments to all partners, stressing out indicators on which partners should pay attention in certain time framework. Project manager and project' Quality assurance manager after that will inform Coordinator about gained results for each partner institution.

#### 5.1.2. Coordinator level

The 2<sup>nd</sup> level control is carried out by the Project Coordinator Team. If a draft of deliverable does not meet expected outcomes, the Coordinator as 2<sup>nd</sup> level of control, will take the necessary corrective actions in order that throughout prompt respond prevent failure of some particularly actions and expected indicators of progress. If it is necessary, the Coordinator may involve the rest of the consortium. A draft deliverable that has passed the 2<sup>nd</sup> level of control



conducted and approved by the Coordinator will be forwarded to the Steering Committee on formal approval.

### **5.1.3. Steering Committee level**

The 3<sup>rd</sup> level of control is run by the Steering Committee. The Steering Committee is the highest decision making body of the Consortium that takes the final decision for the approval of major deliverables.

### **5.1.4. Approval of Authorities**

Getting an approvals of authorities' sometimes takes time, but if Consortia Partners have done everything that is in their responsibility, it is acceptable to include a deliverables in the project reports even if its formal approval is still pending (like in a case of waiting on Accreditation license by HE accreditation body). However it is necessary that such document has passed the 2<sup>nd</sup> and 3<sup>rd</sup> level of control without profound disagreements, or major alternations.

That means that all Consortia partners have to establish internal quality assurance mechanisms, i.e. the contact persons that will always check the output of his/her project teams, before sending documents to the review on next step.

## **5.2. Project Management Leader**

Working package leader e.g. Project Management Leader of each project partner is responsible for quality assurance of all outputs prepared by his/her team, and is in charge to check all deliverables before sending it to the 2<sup>nd</sup> step, e.g. Quality Assurance and Evaluation Plan leader and Project Coordinator. Project Management Leaders' responsibility involves following activities:

- ✓ coordinating the development of the deliverable(s) according to the deliverable template and project working plan,
- ✓ assigning parts of the work to other partners involved in the activity,
- ✓ coordinating the work of other partners involved in the activity, providing guidance and feedback when necessary,
- ✓ aligning the contributions of the other partners involved in the activity, in order to produce the deliverable,
- ✓ submission of the draft deliverable to the Coordinator (2<sup>nd</sup> level control),
- ✓ responsibility for implementing the suggestions for improvements, assigning certain amendments as appropriate,

- ✓ sending the amended draft deliverable on time,
- ✓ reporting to the Quality Assurance and Evaluation Plan Leader for any problems that have occurred during the implementation of the activity.

### 5.3. Other partners involved in the WP activity

As a responsible partner of the Consortia, other partners involved in WP activity as co-authors, are responsible for active participation in performance of the activities with its best knowledge. They are:

- ✓ responsible for the production of their part in the deliverable according to the Project Manager Leader's instructions,
- ✓ preparing their contributions at the appropriate Word Document Template (Appendix 1) to ensure that jointly with the Project Management Leading team contribute to the desirable format,
- ✓ responsible for providing Project Management Leader with the complementary information regarding their work (i.e. references, bibliography, methodologies used, contact details of people interviewed etc.),
- ✓ responsible to offer amendments on deliverable in which they participate, as a result of negative feedback received by project Coordinator or project Steering Committee.

### 5.4. Project Coordinator

Project Coordinator is responsible for the coordination of the whole project within project consortium, regarding to the fact, that Project Coordinator responsibility may be determined as follows:

- cooperation with Quality Assurance and Evaluation Plan Leader in order of ensuring the quality of the project deliverables,
- cooperation with the Project Management Leaders in order of providing relevant quality of the project's deliverables,
- accepting the deliverable or providing final comments to the Project Management Leaders (2<sup>nd</sup> level control),
- cooperating with the Project Management Leaders in order to ensure that all WPs are progressing in conformity with each other and that all inputs and outputs are delivered as it defined in project proposal,
- informing the Project Management Leaders on any changes in the Partnership Agreements that could be potentially related with Work Plan such is timing or content of deliverables that are predefined or expected,
- officially submitting all approved deliverables after 3<sup>rd</sup> level control of approval.

### 5.5. Steering Committee (SC)

As final instance of internal control is a Steering Committee of TRUST project, that is 3<sup>rd</sup> level of control. This level of control has responsibility for evaluation of all project deliverables and quality of project control during project duration.

### 5.6. Quality feedback by the target groups

The satisfaction of end users will also be investigated. It will consider a variety of information from different sources using questionnaires to target groups and consultations with the project beneficiaries.

In order to allow the impact assessment of the project activities, a template for feedback for different meetings / trainings / events was developed (Appendix 4). Document naturally will be adjusted to the specific needs, but the main questions will remain.

### 5.7. Quality Assurance Lead partner

During project duration, project manager in the front of the University of Belgrade team, responsible for running and implementation of Work Package 5 will be professor Sladjana Benkovic PhD. She is responsible for:

1. drafting of the Quality Assurance & Evaluation Plan (WP.5.1),
2. producing of 3 reports on implementation activities regarding WP1; WP2 & WP3
3. producing of 2 reports on evaluation of the new master in Financial Technology and the modernized masters of Business and Economics

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Additionally, in order of busting Quality Assurance activity, till the 10<sup>th</sup> month of project duration, the University of Belgrade will subcontract external quality assurance expert, that should be responsible for producing of 2 detailed reports on implementation of TRUST project activities. First report should be ready till 14 month of project duration and the second till 28<sup>th</sup> month of project duration.

## 6. Deliverables of WP.5 with indicators of progress and time frame

<b>Lead partner:</b>	The University of Belgrade
<b>Starts:</b>	January 15, 2020.
<b>Ends:</b>	December 14, 2022.
<b>Activities:</b>	
	➤ WP.5.1. Drafting of the Quality Assurance & Evaluation Plan
	➤ WP.5.2. Implementation of the Quality Assurance & Evaluation plan
	➤ WP.5.3. Evaluation of the New master in Financial Technology and the modernized masters of Business and Economics

Quality Assurance & Evaluation Plan is envisaged as a combination of internal and external project evaluation. Its' implementation will be supported throughout continuous monitoring activities by project team of the University of Belgrade, as well engagement of independent expert. Quality Assurance & Evaluation Plan should contribute to the effectiveness of the project implementation, by relaying on the stipulated goals and deliverables proposed by project application and which will be evaluated by the Project management and the Steering Committee.

Quality Assurance & Evaluation Plan will focus both on the technical aspects, as well content aspects of the TRUST project, by using:

- Evaluation & analytics tools and reports,
- Periodical recommendations and
- Producing of the recommendations on implementation of the newly accredited Master programmes in the field of Financial technology and modernized masters of Business and Economics in Vietnam and Philippines.

Finally, engagement of external expert and usage of his/hers Reports on the project implementation in the two partner countries, as well feedback gained by National Erasmus+ Offices and from the EACEA, should contribute to transparent and certain project successful implementation.

Deliverable	Description	Deadline
	The Quality Assurance & Evaluation Plan will be drafted and adopted by the project Steering	

<p>5.1. Drafting project's internal plan for Quality Assurance &amp; Evaluation Plan</p>	<p>Committee and after that send to the Project management teams. The plan contains the description of internal evaluation procedures by the Steering Committee and external ones, methodology of evaluation, as well as a set of quality criteria against which the project will be evaluated.</p> <p>Additionally, Plan includes the description of indicators and criteria for both Evaluation of project management and process, as well Evaluation of main project products (to be undertake by external experts), and of the evaluation forms that will be used for grading of the new and modernized master degree programmes in the field of Financial Technology and Business and Economics, with precisions timeframe.</p>	<p>March 14, 2020.</p>
<p>5.2. Implementation of the Quality Assurance &amp; Evaluation plan</p>	<p>Within 5.2 activities, as result of the implementation of the Quality Assurance &amp; Evaluation plan will be drafted periodical recommendations to summarize the results of the evaluation of main project products and project management with the purpose to provide partners essential tips for both process and products further improvement. It will also include, where necessary, the corrective measures to be adopted and recommendations for the project tasks and outcomes following undertaken. The Quality assurance &amp; Evaluation plan will provide periodical recommendations that will be shared among partners according/close to the project milestones and key steps, and in general key moment of project tasks undertaken, as follow:</p> <p>11/2020 – Milestones (M1, M2): drafting of the Reports on current capacities at Vietnamese and Philippines HEIs and on the labor market needs</p>	<p>November 14, 2020, July 14, 2021, January 14, 2022.</p>

	<p>of the Financial Services Industry in Vietnam and Philippines (WP2, month 10).</p> <p>07/2021 – middle of the implementation process of both Master in FinTech and the updating of the masters of Business and Economics. This process is very long and pivotal for the process success and an intermediate evaluation guarantee the quality of the final results by allowing to adjust not adequate procedures as well as to mitigate expected risks such as the delay in the master accreditation.</p> <p>01/2022 – Milestone (M, M4, M5): Accreditation of the Master in Financial Technology in Vietnam and Philippines, Development of the course modules to modernize the MBA master/ or other master's in Business &amp; Economics; HEIs staff trained (WP3, month 22); Students selected in Vietnam and Philippines HEIs (WP4, month 23)</p>	
<p>5.3. Evaluation of the new master in Financial Technology and the modernized masters of Business and Economics</p>	<p>As result of the implementation of the Quality Assurance &amp; Evaluation plan it will also be drafted the Recommendations for the implementation of the Master in Financial technology and the modernization of master programmes in field of Business and Economics in Vietnam and Philippines. The document will summarize the results of the Masters implementation in Vietnam and Philippines and will provide important information and suggestions for the masters' further sustainability. Additionally, report will include the periodical recommendations and the results on main project products in order of providing sustainability main project results and further proficient collaboration among universities and companies of the Financial Services Sector in Vietnam and Philippines.</p>	<p>14 December, 2022.</p>

Table 1 - WP.5. Quality Assurance and Evaluation Plan



The first activity in the work package refers to the adopting of the quality assurance and evaluation plan by the project Steering Committee. The second activity refers on implementation of Internal and External evaluation of project achievements by the project partner as well independent expert. The third activity refers on Reports that should provide TRUST project sustainability throughout collaboration of universities and companies of the Financial Services Sector in Vietnam and Philippines as a partner country.



## 6.1. Quality Assurance & Evaluation Plan

Quality Assurance & Evaluation Plan should be drafted by the University of Belgrade till March 14, 2020 and adopted at the 1<sup>st</sup> meeting that will be held in London, England, Great Britain, March 13, 2020. By that occasion it will be done first evaluation of TRUST projects, and all Consortia partners will be interviewed regarding satisfaction with understanding of assignments, responsibilities, timeframes and obligations from aspect of reporting and performing overtaken responsibilities on precisely defined time framework.

Additionally, partners will have a chance to hear presentation about importance Quality Assurance & Evaluation Plan, how it will be applied, what it will be measured during project duration, who is in charge for implementation of the Quality Assurance and Evaluation Plan, how indicators of progress will be measured, why is important to stick with time framework and how extension of predefined time frameworks could potentially jeopardize whole project.

## 6.2. Implementation of the Quality Assurance & Evaluation Plan

The Quality Assurance & Evaluation Plan will be implemented throughout evaluation quality of project activities and deliverables.

A short evaluation form will be filled in during or after each project event (see Appendix 4). The questions in the form will be standardized and same for each event, in order to enable comparison across project events. The form is anonymous and it will cover the following sections: Quality of the organization, Quality of the presentations, Quality of the objectives, Quality of Tasks and activities, Overall satisfaction, and any further comments. Completing the form should not take more than 3 minutes, as the idea is not to make it too time consuming. Event evaluation will be performed after each milestone defined by Work Plan and the University of Belgrade will be in charge for preparing and collection of questionnaires, and preparing of Reports.

In the internal project evaluation process as well preparing of Reports by the University of Belgrade, the following progress indicators and time frameworks will be used for each of project working package:

**WP.1. Report on current capacities at Vietnamese & Philippines HEIs; Report on the labour market needs of the Financial Services industry in Vietnam and Philippines.**



- Report drafted and published on current capacities at Vietnamese and Philippines HEIs **delivered till August 15, 2020**;
- Report drafted and published on the labour market needs of the Financial Services industry in Vietnam & Philippines **delivered till November 15, 2020**.

**WP.2. Accredited Masters in Financial Technology; MBA master and/or other masters' in Business & Economics modernised; TRUST E-learning platform**

- 1 Master in Financial Technology accredited Vietnam and Philippines **delivered till September 14, 2021**;
- 2 MBA master and/or other masters' in Business & Economics modernised each HEI in Vietnam and Philippines **September 14, 2021**
- TRUST E learning platform **delivered till September 14, 2021**

**WP.3. Development: Study visits at Vietnamese & Philippines HEIs; Software purchased; Training of trainers in distance modality.**

- 2 Study visits arranged at Vietnamese & Philippines HEIs **organised during February and March 2021, as well in November 2021 and January 2022**;
- Purchase of equipment should be **done in a period February-May 2021**;
- Training' of trainers in distance modality should be **done from June 2021 till January 2022**.

**WP.4. Enrolled students in the master in Financial Technology & the modernised masters of Business and Economics in Vietnam & Philippines HEIs; Students thesis (Master in Financial Technology); Students thesis (Modernised Masters in Business and Economics).**

- Promotion of the new / updated masters and selection of the students in Vietnamese and Philippines HEIs should be **done in a period between September 2021 and January 2022**.
- at least 120 of students enrolled in the master in Financial Technology & the modernised masters of Business and Economics in Vietnam should be **done till January 14, 2022**;
- at least 120 of students enrolled in the master in Financial technology and the modernised masters on Business and Economic in the Philippines should be **done till January 14, 2022**;
- at least 60 Vietnamese students thesis should be **defend till December 14, 2022**;
- at least 60 Philippines students thesis should be **defend till December 2022**.

**WP.5. Quality Assurance & Evaluation Plan;**

- 1 Quality Assurance & Evaluation plan **drafted till March 14, 2020**;

- 4 Quality Assurance & Evaluation periodical Recommendations done till **November 15, 2020; July 14, 2021, January 14, 2022 and December 14, 2022;**
- 1 Recommendations for the implementation of the Master in Financial technology and the modernised masters of Business and Economics in Vietnam and Philippines **delivered till December 14, 2022.**

**WP.6. Dissemination and Exploitation Plan;**

- 1 Dissemination & Exploitation Plan drafted **till March 14, 2020;**
- Promotional products **developed till April 2020;**
- 1 TRUST leaflet/card of the new Master in FinTech
- 1 leaflet/card on the modernised masters of Business and Economics;
- 1 TRUST Roll-up;
- at least 3 newsletters issued **at the end of each year of project duration;**
- 1 national Event in Vietnam **organised from October 2020 till January 2021,**
- 1 national Event in the Philippines **organised from October 2020 till January 2021;**
- Final Round Table Event in Vietnam **organised from November 2022 till January 2023;**
- Final Round Table Event in the Philippines **organised from November 2022 till January 2023;**
- 6 local promotional events each HEIs of partner country in order of spreading a word about new/modernised master programme **in period of October/December 2022;**
- 1 Online On-line community of practice (CoP) of **professionals starts from July 2020;**
- **Project Website till March 14, 2020;**
- 2 social media pages **at least.**

**WP7 Management**

- 1 Management Handbook **drafted till February 15, 2020;**
- 7 minutes of the meetings drafted;
- 2 annual reports delivered to the EACEA **till 18 and 36 month project duration;**
- 6 financial internal reports
- Financial audit that will start **in a 36 month of project duration.**

The project will be monitored and externally by the National Erasmus Offices (NEO) in Vietnam and Philippines, as well by EACEA. NEO performs do 3 types of monitoring visits, based on deliverable achievement:

- (1) Preventive (in the first project year);
- (2) Advisory (after the first project year); and
- (3) Control (after the end of project – sustainability check).

As part of their regular activities, (NEO) in the two partner countries are expected to conduct regular desk monitoring and field monitoring visits. The official feedback received by the consortium will be taken as input for the quality enhancement by the project consortium. The monitoring by NEO includes the assessment of various aspects of project implementation, such as **relevance** (is project still relevant in terms of its previously determined goals and achievements), **efficiency** (are the activities in work-packages done on time in line with the proposed project Working Plan), **effectiveness** (how well are project specific objectives met), **impact** (at the level of departments, faculty, university, etc.) and **sustainability** (what would stay after the project is finished). Based on the progress of these aspects, the NEO sends the report on their findings to EACEA.

Apart from the monitoring from NEO and EACEA, the University of Belgrade, will additionally subcontract **the External evaluator** for the purpose **of preparation of 2 External Reports on the project deliverables**. First report will be delivered till January 14, 2021, and second one till January 14, 2022.

The evaluation of External evaluator will target quality of project content development i.e. extent to which it contributes to the stipulated goals in accordance with the recommendations and templates of EACEA. The external component will consist of the evaluation by an external independent expert, appointed by the project Steering Committee that will take place in November 2020 at the University of Belgrade in Belgrade, Serbia, in order of delivering a Report that will explain project achievements in detail relaying on stipulated goals and defined time framework.

Prior to this, the University of Belgrade will propose 3 experts based on its assessment of their competences for this highly important assignment. The chosen expert will be hired by the project coordinator, under the budget heading Subcontracting – *“External evaluation by the independent expert”*. Amount foreseen for this activity is **EUR 8.000**.

### **6.3. Evaluation of the new master in Financial Technology and the modernized masters of Business and Economics**

As result of the implementation of the implementation of the Master in Financial technology and the modernised masters of Business and Economics in Vietnam and Philippines it will be delivered **2 Reports** with evaluations regarding achieved results that have been stipulated by project proposal, as well with recommendations regarding providing sustainability and quality of collaboration between universities and companies of financial service sector in Vietnam and Philippines.



The reports will include an overview of the periodical recommendations that have been given by the University of the Belgrade as partner responsible for quality assessment and evaluation of project results and deliverables. The Report should be delivered to the Coordinator by the University of Belgrade **till November 14, 2022**.



## 7. Project Management and Risk Plan

As part of the internal quality management, a regular risk assessment will be carried by the Steering Committee during the main project meetings (Risk brainstorming) which shall lead to corrective actions and potential adaptations of the Work Plan based on a sound process.

The project management and risk plan strategy address issues that could potentially endanger the achievement of the overall goal of the project and its objectives considering potential financial risks (overspending and underspending), timing (postponing of activities / deliverables), performance risks (project management), and sustainability of the project results. The main aim will be to provide a sound assessment, to anticipate challenges in a systematic way and to minimize the potentially negative overall impact.

The identification and assessment of new risks is a joint responsibility of all project partners who have to communicate them to the Project Coordinator and the Steering Committee, eventually suggesting also possible interventions and solutions, as soon as they get aware of those risks. In particular, partners may think of preventive actions (avoiding that the risk occurs) and corrective actions (decreasing the severity and impact), specifying also the resources that would be needed.

The Steering Committee may react in several ways, ranging from the simple acceptance of the situation in the case of negligible risks, to the enforcement of a mitigation plan including alternatives, workarounds and the proposed corrective actions that will make the risk consequences acceptable for the consortium.

Also the external reviewers (representatives of NEO and EACEA) will be involved in the risk management. During their monitoring visits they will assess if there is a risk that the project will fail to meet its key indicators and if there is a risk that project partners will not be able to spend all the money according to the planned project budget.

The proper allocation of resources to the project by the individual project partners is of outmost importance. There are several possible risks connected: the delay of the project implementation as defined in the project work plan; the rushed implementation of the work plan with low quality; an underspending during the project implementation (also causing a shift in the headings' ratio), meaning that the project timetable is followed with reference to technical deliverables, yet the relevant expenditures are not timely invoiced or validated; etc.

The project partners all have to ensure that they allocate the needed resources to the project, both human and financial.

### 7.1. Practical approach to risk identification

The first step in project risk management is to identify the risks that are present in a project. The risks should furthermore be identified as early as possible in order to deal with them properly and to think about corrective and/or preventive actions.

In order to identify and monitor the risks within TRUST project, a risk monitoring sheet has been developed including the information on corrective and/or preventive actions (Appendix 5).

### 7.2. Risks monitoring procedure

All project partners, e.g. WP leaders are responsible for risk monitoring process of the activities on its WP.

- WP leaders should **identify possible risks/uncertainties** in their WP and fill in the template (Appendix 5)
- The **risks monitoring sheet** (Appendix 5) **are communicated** to project Coordinator (USGM)
- Project Coordinator (USGM) **register, analyses and priorities risks/uncertainties and discussed the possible solutions with SC**
- Project Coordinator (USGM) **plans and implements risk responses**

Steering Committee meetings could be used also to organize risk brainstorming session when necessary basing on the Appendix 5 template.

## 8. Financial reporting and audit

Project Secretaries / administrative staff are responsible for project administration (from each partner) and Coordinator will check the supporting documents for financial reporting sent to the Project Coordinator. During their review, they will take into consideration following assessment criteria:

- Conformity of the expenditures with the budget of the project;
- Eligibility of the expenditures;
- Correctness and completeness of all supporting documents and certified copies of invoices;
- Correctness of the calculations and applied exchange rates;
- That any changes which occurred between budget categories are eligible and justified;
- Expenditures must be in conformity, including full eligibility, with the allocated budget.

In a case that information in periodical Financial Reports are not complete or justified, the Project Secretary/ administrative staff will help and make recommendations on how this situation can be rectified prior to the final approval of the Annual report by the Coordinator. The Report approved in this way is the basis for the transfer of next instalment to the partner institution.

Project financial audit will start in 36<sup>th</sup> of TRUST project duration and project Coordinator is responsible for this project activity.

## 9. Annexes

### Appendix 1. TRUST document template



## Financial Technology and digital innovation to modernise and develop curricula of Vietnamese and Philippines Universities

Project № 610256-EPP-1-2019-1-IT-EPPKA2-CBHE-JP

**DEV.N.**  
**TITLE**





## Appendix 2. TRUST Power point presentation template



Financial Technology and digital innovation to modernise and develop curricula of Vietnamese and Philippines Universities

**Presentation title**

*Speaker name, Pn° Acronym*

Kick-off meeting  
March 12 – 13, 2020

Co-funded by the  
Erasmus+ Programme  
of the European Union



**Slide title**

Co-funded by the  
Erasmus+ Programme  
of the European Union



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## Dev. 5.1 Quality Assurance & Evaluation Plan



Co-funded by the  
Erasmus+ Programme  
of the European Union 

### NAME SURNAME

Partner Organization name \_\_\_\_\_

Email \_\_\_\_\_

Phone \_\_\_\_\_

Skype \_\_\_\_\_

TRUST Kick-off meeting 12, 13 March 2020

*"The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein."*

### Appendix 3 - Event attendances list



## Financial Technology and digital innovation to modernise and develop curricula of Vietnamese and Philippines Universities

Project № 610256-EPP-1-2019-1-IT-EPPKA2-CBHE-JP

Event: xxxxx Venue:xxxxx

Date: xxxxx

Partner responsible: xxxxx

Contact E-mail: xxxxx

No.	Name	Organization	Signature	Permission <sup>1</sup> signature	E-mail address
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

<sup>1</sup> I confirm with my signature that project organizers and project partners are allowed to use event photos for project promotion activities

## Appendix 4. Event evaluation form



### **Financial Technology and digital innovation to modernise and develop curricula of Vietnamese and Philippines Universities**

Project № 610256-EPP-1-2019-1-IT-EPPKA2-CBHE-JP

## **EVENT EVALUATION QUESTIONNAIRE**



**Event:** \_\_\_\_\_

**Venue:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Partner responsible:** \_\_\_\_\_

**Contact**      **E-mail:**      benkovicsladjana@gmail.com;      [s.correnti@unimarconi.it](mailto:s.correnti@unimarconi.it);  
[i.reggiani@unimarconi.it](mailto:i.reggiani@unimarconi.it); [Dane.Lukic@gcu.ac.uk](mailto:Dane.Lukic@gcu.ac.uk) ;

Dear Participant,

Thank you for attending this event. In our effort to improve an organization and the impact of these events we invite you to complete the following questionnaire. In most of the questions you will be asked to rate your satisfaction on a scale by ticking the appropriate answer. In all the questions you will be asked to describe your personal opinion in a few words and to give suggestions for the improvement of the following events.

We thank you in advance for your valuable contribution!



**1. Quality of the organization event**

		Very low	1	2	3	4	5	Very high
a)	Please evaluate the overall quality regarding the organization of the meeting		1	2	3	4	5	
b)	Please evaluate the quality of information provided		1	2	3	4	5	
c)	Please evaluate timelines of the organization		1	2	3	4	5	
d)	Please evaluate the meeting venue location		1	2	3	4	5	
e)	Please evaluate catering		1	2	3	4	5	
f)	Please evaluate the quality of organization staff(s)		1	2	3	4	5	

**Additional comments/suggestions:**

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**2. Quality of the presentations prepared by project teams and lectures**

	Very low	1	2	3	4	5	Very high
<b>2.1. Please evaluate the overall quality of the presentations</b>		1	2	3	4	5	

**2.1.1. Please evaluate the quality of each presentation prepared by project team**

a) Erasmus+ Projects for Uni Marconi University-Why TRUST Matters?	1	2	3	4	5	
b) Where we are after three months of project duration?	1	2	3	4	5	
c) Future steps in next 6 months	1	2	3	4	5	

**Please indicate which presentations were particularly good and/or helpful:**

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**Please indicate which presentations were not good and/or helpful:**

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Were topics missing?

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What topics you think we should consider or include:

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Additional comments/suggestions:

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**2.2. Please evaluate the overall quality of the lectures**      **Very low    1    2    3    4    5    Very high**

2.2.1. Please evaluate the quality of each lecture

	Very low	1	2	3	4	5	Very high
a) Overview of the FinTech industry in partner countries (Fintech Philippines Association - FPA)		1	2	3	4	5	
b) ACCREDITATION PROCEDURES IN VIETNAM & PHILIPPINES (representatives from University of Economics and Business of Vietnam National University - VNU, Saint Louis University – SLU)		1	2	3	4	5	
c) MASTER DESIGNING: DURATION / CONTENTS / ECTS (representatives from Marconi University – USGM)		1	2	3	4	5	
d) Project equipment (FinTech solutions & software): presentation and/or open discussion (Deus Technology - DT, Fintech Philippines Association - FPA)		1	2	3	4	5	
e) Administrative and financial arrangements (representative from Marconi University – USGM Coordinator)		1	2	3	4	5	
f) WP7: Project Management (representative from Marconi University – USGM Coordinator)		1	2	3	4	5	
g) WP1: Mapping the current capacities of HEIs and the labour market needs of the Financial Services Industry in Vietnam and Philippines: WP presentation and discussion on next steps (representatives from the Mapua University; Hue College of Economics – HCE)		1	2	3	4	5	
h) WP5: Quality & Evaluation Quality Assurance & Evaluation Plan overview, WP presentation and discussion on next steps (representative from the University of Belgrade)		1	2	3	4	5	
i) WP6: Dissemination and Exploitation		1	2	3	4	5	

Dissemination and Exploitation Plan overview, WP presentation, Project Web site /Social media, discussion on next steps (representative from the Ho Chi Minh City Open University - HCMCOU;								
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**Additional comments/suggestions:**

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### 3. Objectives

a) To what extent did the organizers meet the objectives of the meeting? Very low   1   2   3   4   5   Very high

b) To what extent did the presenters meet the objectives of the meeting?	Very low	1	2	3	4	5	Very high
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**Additional comments/suggestions:**

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### 4. Tasks and activities

a) Are the upcoming tasks and activities clear to you after the meeting? Very low   1   2   3   4   5   Very high

**Additional comments/suggestions:**

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### 5. Overall satisfaction

a) How satisfied are you with the meeting in general?





**Additional comments/suggestions:**

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**Any further comments/suggestions:**

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## Appendix 5. TRUST Risk register

Id	Description of Risk	Impact on Project (Identification of consequences)	Probability <sup>2</sup>	Impact <sup>3</sup>	Date of Review	Actions (Preventative or Contingency)	Individual/ Group responsible for action(s)	Cost	Timeline for action(s)
1									
2									
3									
4									
5									
6									
7									
8									

Table 2 - TRUST Risk register table

<sup>2</sup> Probability:

High – Greater than <70%> probability of occurrence

Medium – Between <30%> and <70%> probability of occurrence

Low – Below <30%> probability of occurrence

<sup>3</sup> Impact:

High – Risk that has the potential to greatly impact project cost, project schedule or performance

Medium – Risk that has the potential to slightly impact project cost, project schedule or performance

Low – Risk that has relatively little impact on cost, schedule or performance

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