EUROPEAN UNION | Erasmus+

Phase 3
Midterm Review

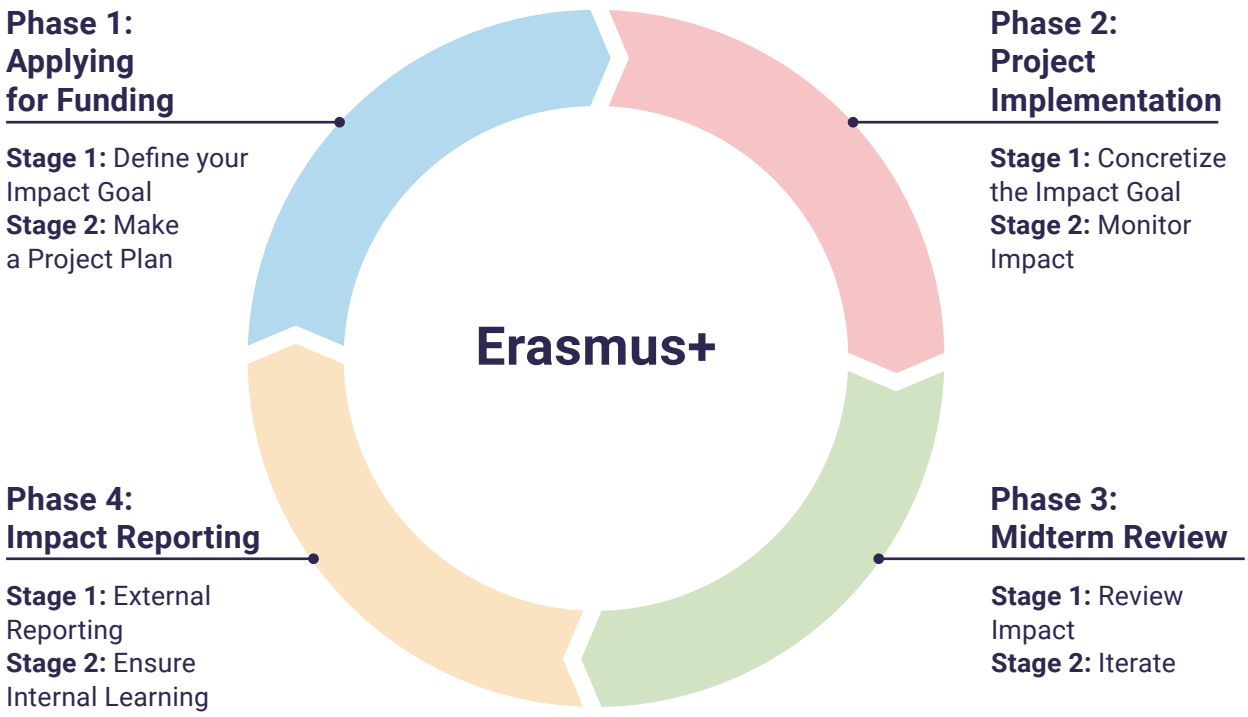
Impact Toolkit for Erasmus+ Beneficiaries

2025 | Original content and templates

Toolkit Structure

This toolkit is structured around a project cycle consisting of four phases, each essential for the success of any Erasmus+ project. This cycle provides an overview for project coordinators, even those new to the process. However, it is important to keep in mind that the cycle is a bit of a simplification: in real-world projects, the phases will sometimes overlap, and some steps may come before others. Below each step, you can find concrete impact tools that you can use during your project.

This toolkit contains nine impact tools. Each tool is described in detail to outline the purpose of the tool, and simple step-by-step instructions for using the tool in practice. The toolkit contains examples of what the final output of a tool may look like. At the end of the document you find all the templates for the tools that can be printed out and filled by hand. However, do not let the design of the tools limit your creativity – the tools are designed to give flexibility to beneficiaries. You can take the core idea of the tool but make your own digital version of it, or take a tool from one phase but apply it in another. The toolkit is a compass and not a map – what matters is that it helps you think about impact in your daily work.



Let's break down each phase and its associated stages:

By following this structured approach, even those new to project coordination can effectively manage their Erasmus+ projects, ensuring they not only meet administrative requirements but also create meaningful, lasting impact. The toolkit provides concrete methods and approaches for each step of the project.

Phase 1: Applying for Funding
This initial phase sets the foundation for your project.

Stage 1: Define your Impact Goal
Here, you will articulate what change you want to see as a result of your project. This could be, for example, improving language skills, enhancing cultural understanding, or developing professional competencies.

Stage 2: Make a Project Plan
Outline how you will advance your impact goal. This includes detailing activities, timelines, and resources needed.

Phase 2: Project Implementation
This phase is where your plans come to life.

Stage 1: Concretize the Impact Goal
Transform your broad impact goal into specific, measurable or observable, objectives. For example, "improve language skills" might become "70% of participants will advance one CEFR level in their target language."

Stage 2: Monitor Impact
Regularly check if you are on track to meet your objectives. This might involve surveys or detailed note-taking during your project.

Phase 3: Midterm Review
Halfway through, it is crucial to assess your progress and make necessary adjustments.

Stage 1: Review Impact
Evaluate how well you're on the road towards the impact goals. For example, are participants showing the expected improvements?

Stage 2: Iterate
Based on your review, make any needed changes to better align the project with its goals. This could mean adjusting activities or reallocating resources.

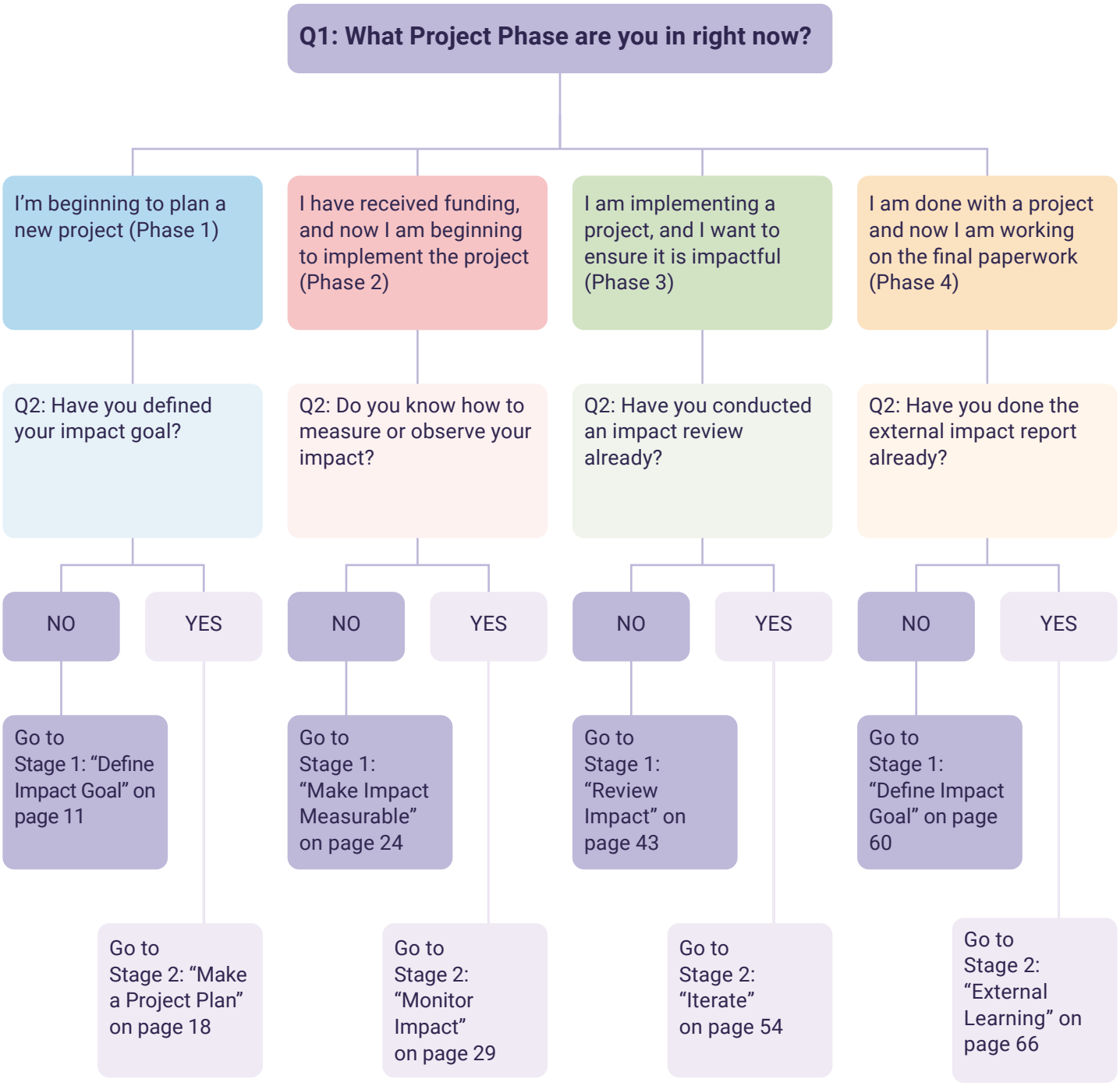
Phase 4: Impact Reporting
As your project concludes, it is time to report your results and learn from the experience.

Stage 1: External Reporting
Prepare a comprehensive report for your funders, detailing your achievements, challenges, and signs of impact.

Stage 2: Ensure Internal Learning
Reflect on the project within your team. What worked well? What could be improved? Use these insights to enhance future projects.

User Instructions

Are you unsure of which tool that you are in need of right now? Use the decision-tree below to get a sense of which part of the toolkit that could be of most use to you!



PHASE 3

Midterm Review

STAGE 1

Review Impact

Tool: Most Significant Change (MSC)

When to use it? During (midterm review) or after (reporting) Erasmus+ projects to evaluate impact through participant stories. The tool ideal for uncovering unanticipated outcomes and fostering reflective discussions on what mattered most.

Why use it? Erasmus+ is a social change program whose key purpose is behavioral change. MSC provides qualitative insights into how projects affect individuals or communities. It highlights personal experiences, showcasing the human element behind the impact. This method also helps identify success stories and areas for improvement.

What is it? MSC is a storytelling-based evaluation approach. Participants share narratives about the most significant change they experienced due to a project. These stories are then reviewed and analyzed to identify common themes, key outcomes, and impactful practices.

Step-by-Step Guide

Step 1 **Define the focus area:** Use your impact goal to decide on the domain of change to explore (e.g., personal growth, social inclusion). Frame a guiding question, like: “What was the most significant change you experienced as a result of this project?”

Step 2 **Collect stories:** Ask participants to share their experiences in response to the guiding question. Record or write down detailed accounts, ensuring a diverse range of perspectives. The collection can take place through interviews, short videos, diaries or informal conversations. It is s important to have several interviews for analysis to have enough data, but usually max 12 interviews is enough to get a comprehensive view on project impact. Be sure make the material representative and include different kinds of respondents, so that your analysis won’t be biased.

Step 3 **Select stories:** Assemble a review group (e.g., project staff, partners, or stakeholders) to read the collected stories. Discuss and choose the ones they find most significant, justifying their choices.

Step 4 **Analyze themes:** Review the selected stories to identify recurring themes or key outcomes. Highlight connections between these changes and the project’s goals.

- Which themes are recurring in the material? Are there some surprising themes, or are some expected themes missing? How do the themes correspond to the project’s goals?
- Are the respondents in agreement or are there disagreements between participants regarding a certain theme? What are the disagreements like? Can you find the reasons behind these disagreements?
- Which themes seem to often appear together in the same interview? Which ones not? Can you tell reasons behind these correlations?

Step 5 **Share and reflect:** Share the selected stories with the wider team or community. Reflect on the findings, and discuss lessons learned or ways to enhance future activities.

Tool: Impact Diary
Most Significant Change
[Example Step 1]

GUIDING QUESTION	DEFINE THE FOCUS AREA	Step 1
What was the most significant change you experienced as a result of this project?	...	

Tool: Impact Diary
Most Significant Change
[Example Step 2]

THEMES

People | Language | Confidence | Local city & culture | Accommodation

STUDENT NAME	IMPACT STORIES Step 2
Student A	"I had the best week of my life. Especially the new friends I got, they were the best thing and a very positive and unexpected thing. It was funny that I found people who are just like me even though we are from different countries. I'm meeting them next spring, Emma invited us to her place."
Student B	"It was a good week. It was interesting to see a new city and how it looks and sounds different from my hometown. The food was so good, I want to learn cook the best dishes at home. It was nice meeting new people, though I'm happy to get home to my family. I do feel more confident now with speaking and travelling to new places. But maybe the new favourite food is still the biggest change."
Student C	"I found a girlfriend, that's the most significant thing. I was nervous to speak on the first day, but something clicked in my head and after that it was easy to speak though my language is still not super good."
Student D	"I don't know. The food was ok. The place I stayed at was ok. The town was interesting. I learned some new words but otherwise I didn't feel that the experience was too useful for me, no major change really. I felt that my language was already better than almost everyone else's."

Tool: Impact Diary
Most Significant Change
[Example Step 3]

THEMES

People | Language | Confidence | Local city & culture | Accommodation

THEME	NOTES Step 3
People	Most respondents found the social relations to be the most impactful aspect of their experience. Some formed very deep new connections with the other participants.
Language	Majority of participants also mentioned improved language skills as an important outcome of the project.
Confidence	Some respondents emphasised strengthened confidence as an important change. The kinds of confidence differed (speaking in a new language, travelling, social confidence).
Local city & culture	Experiencing the local culture was influential to some of the respondents. Cultural aspects were emphasized especially by those participants for whom the social interactions weren't as meaningful.
Accommodation	Only one respondent mentioned accommodation facilities, and even then not as a very influential aspect of the experience.

Tool: Impact Diary
Most Significant Change
[Example Step 4]

THEMES

People | Language | Confidence | Local city & culture | Accommodation

DRAW CONCLUSIONS & RECOMMENDATIONS Step 4

The most common and impactful changes in participants' lives were related to forming new social relations and improving language skills. Improved language skills is central to the projects impact goal, so this can be considered a success. The force of the social aspect is somewhat surprising, perhaps this influentiality can be taken into better account in marketing and recruiting new participants. Some respondents felt more confident after the experience in different respects. However, these positive impacts were not shared by all, so in the future it is important to consider, how we can support the participants who are perhaps shy or otherwise don't form social connections as easily, and how we can make the experience beneficial even to those who already have very strong language skills. Helping the participants to see the local city, culture and food strengthens the positive experience and is important for the less social participants. Accommodation seems to play a minor role in the total impact, but it's important to make the circumstances comfortable to everyone, as it can help to make the experience more pleasant.

Tool: Impact Diary Most Significant Change



Step 1: Define the focus area
Step 2. Collect stories
Step 3. Select stories
Step 4. Analyze themes
Step 5. Share and reflect

GUIDING QUESTION	DEFINE THE FOCUS AREA Step 1
What was the most significant change you experienced as a result of this project?	

Tool: Impact Diary
Most Significant Change

Step 1: Define the focus area
Step 2. Collect stories
Step 3. Select stories
Step 4. Analyze themes
Step 5. Share and reflect



THEMES

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STUDENT NAME	IMPACT STORIES Step 2

Tool: Impact Diary
Most Significant Change

Step 1: Define the focus area
Step 2. Collect stories
Step 3. Select stories
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THEMES

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THEME	NOTES Step 3

Tool: Impact Diary
Most Significant Change

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THEMES

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DRAW CONCLUSIONS & RECOMMENDATIONS Step 4

Review Impact Additional Tools

Project Performance Review: A systematic evaluation of a project's progress and performance against established goals and metrics. It helps stakeholders understand how well the project is meeting its objectives and allows for timely adjustments.

Gate Review: Also known as phase gate review or stage gate review, this structured evaluation occurs at specific points in a project's lifecycle to assess whether it should proceed to the next phase based on predetermined criteria. This can be used, for example, if you are trying out new approaches for your project but you are unsure of whether it works and should be continued in the following phases of the project.

Stakeholder Feedback: Gathering input from project team members, participants, external stakeholders, and other relevant parties through interviews, surveys, or workshops. This provides diverse perspectives on different aspects of the project and is a good approach for continuously ensuring that all involved parties are satisfied and heard in the project.

STAGE 2

Iterate

Tool: After Action Review (AAR)

What is it? An AAR meeting is a structured, team-based discussion focused on reviewing a specific activity or phase of a project based on the data gathered in previous stages. The goal is to reflect on what worked, what didn't, and how to improve moving forward. These meetings are short, focused, and action-oriented.

When to use it? Conduct AAR meetings regularly during the Erasmus+ project to reflect on recent activities and outcomes. These meetings are particularly valuable after major events, milestones, or challenges to capture lessons learned and refine the project in real-time.

Why use it? AAR meetings foster collaborative reflection, enabling the team to identify successes, challenges, and areas for improvement to ensure maximum impact. They ensure that valuable insights are immediately applied, making the project more adaptive and effective throughout its implementation.

Step-by-Step Guide

Step 1 **Set a clear focus:** Define the scope of the meeting (e.g., reviewing a workshop, mobility experience, or outreach campaign). Communicate this focus to all participants in advance.

Step 2 **Communicate:** Communicate the focus and practicalities of the meeting in advance to all participants.

- Make sure the team has time reserved for the meeting after the activity. The meeting takes approximately 15–30 minutes. The meeting can be conducted in person or online.

Step 3 **Ask a limited set of key questions:** Structure the meeting around questions like the one's outlined in the template on the next page.

- Remember that you can edit the template to include questions that are relevant for your project! For example, you may want to ask into the wellbeing of participants and stakeholders.

Step 4 **Encourage open dialogue:** Create a safe environment where all team members can share their perspectives honestly. Ensure everyone's voice is heard.

Step 5 **Document key insights:** Assign a note-taker to capture key points, lessons learned, and actionable recommendations. Use simple templates to organize the data.

Step 6 **Apply insights immediately:** Turn the identified improvements into specific action steps. Assign responsibilities and timelines to ensure follow-through before the next review.

Tool: After Action Review (AAR) [Example]

FOCUS

Key Question **What were we expecting to happen?**

A) What was our goal?	**B) What was our plan?**
To successfully deliver the first digital skills workshop and assess its effectiveness in engaging students and meeting learning objectives.	Provide an introductory session on digital literacy, followed by hands-on activities using digital tools to solve real-world problems.
C) How did we assume people to act?	**D) Did we have some other assumptions?**
We assumed students would be enthusiastic, actively participate, and engage with the tools provided.	We assumed students would have a baseline familiarity with basic digital tools and that the session length would be adequate.

Key Question **What actually happened?**

A) Was it different from what we expected? How?	**B) What worked well? Why?**
Yes, some students were hesitant to participate, likely due to varying levels of prior experience, and the session ran longer than expected.	The hands-on activities were well-received by students who had prior experience, as they allowed for practical learning and problem-solving.
C) What could have gone better? Why?	**D) Which of our assumptions were wrong/right?**
The introduction segment was too advanced for some students, which led to confusion and disengagement early on.	It was right to assume that practical activities would be effective, but we overestimated the students' baseline digital skills and underestimated the need for a more tailored introduction.

Tool: After Action Review (AAR)

PRINT OUT

USE ONLINE

Step 1: Set a clear focus
Step 2: Communicate
Step 3: Ask a limited set of key questions
Step 4: Encourage open dialogue
Step 5: Document key insights
Step 6: Apply insights immediately

FOCUS	
Key Question	
A)	**B)**
C)	**D)**
Key Question	
A)	**B)**
C)	**D)**

Iterate
Additional Tools

Sprint Retrospective: A structured meeting held at the end of each short sprint in a project to reflect on the team's processes and identify areas for improvement. It allows teams to continuously adapt and enhance their workflow.

Kaizen Events: Short-term improvement events, or meetings, that focus on quickly identifying and implementing changes to enhance processes. These events promote continuous improvement through rapid iteration cycles.

A/B Testing: A method of comparing two versions of a project's subtask or feature to determine which performs better. It allows for data-driven decisions and iterative improvements based on user feedback. While the tool stems from product development, the logic can be applied to Erasmus+ projects by comparing two alternative approaches of implementing a specific stage.

The Erasmus+ impact handbook: The handbook provides Erasmus+ actors with an in-depth understanding of what impact means in the context of education and training, along with concrete step-by-step advice on how to work with impact. This toolkit has been developed to align with the handbook, but reading the handbook is a good idea for everyone engaged in Erasmus+ projects.