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Social inclusion and common values: the contribution in the field of education and training

EACEA/34/2019

D2.1 INCLUDEME pilot guidelines

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Statement of originality

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1. INTRODUCTION

The INCLUDEME project engages both direct and indirect Target Groups (TGs) in research-oriented activities that will inform the design and development of the INCLUDEME platform. To this end, the project focuses on identifying and embracing a blend of methods and tools for identifying the needs and requirements of target groups while also pursuing ongoing evaluation of the INCLUDEME platform, towards nurturing inclusive education for disadvantaged and disabled students. In addition to analysing the user needs and requirements, a set of pilots will be set up (in WP2) and carried out (in WP6) involving target group participants (both individuals and organisations).

In particular, **Direct Target Groups (DTGs)** integrate DTG1: socio-economically disadvantaged students; DTG2: students with disabilities (health-related needs); and DTG3: school leaders and teaching staff in high-schools and universities. The first two direct target groups include individuals who experience a higher risk of poverty, social exclusion, discrimination, and violence than the general population, including, but not limited to, ethnic minorities, migrants, people with disabilities including children, isolated elderly people, and many other groups[1]. The third direct target group includes school leaders and teaching staff working with these individuals and are aware of the challenges they face. Collectively, these three direct groups are purposefully selected to emphasise the two-fold focus on learning and teaching. The recognition that both students (disadvantaged learners and students with disabilities) and their teachers need to have access to inclusive resources, lies at the core of the INCLUDEME platform.

At the same time, it is recognised that instructional or pedagogical actions are not successful if applied solitarily. Therefore, in order to create sustainable involvement and effective outcomes, the project also involves and activates **Indirect Target Groups (ITGs)** to increase the impact and uptake of the project outcomes. Indirect Target Groups include: ITG1: primary and secondary education organisations; ITG2: families; ITG3: Non-Governmental Organisations (NGOs); ITG4: public authorities; and ITG5: policy makers. The set of direct and indirect target groups that INCLUDEME project embraces, along with the expected numbers are shown in Figure 1 below.

Figure 1. Direct and Indirect Target Groups
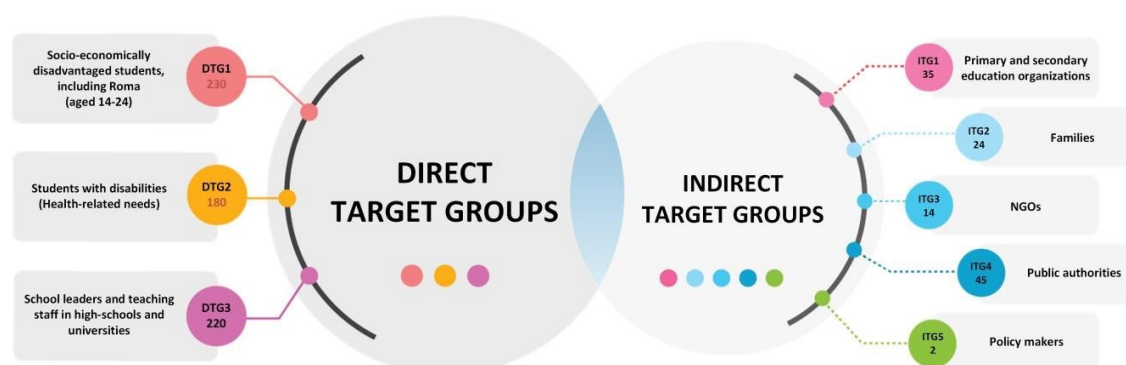
1.1 Structure of WP2 Report

This report documents the work conducted under WP2 and incorporates feedback and input from all consortium partners. Deliverable D2.1 (WP2 Report) is organised as follows: Section 1 introduces the work package leadership team and provides an overview of WP2 outlining the main aim, tasks, and

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[1]https://eige.europa.eu/thesaurus/terms/1083

objectives of WP2. Section 2 documents the process followed for the selection of target groups for setting up specific pilots. Section 3 describes the piloting guidelines and programme for each target group which also serves as Result R2.1 of WP2. Specific Guidelines and four distinct options are outlined for conducting pilots with the target group participants taking into account the diverse needs of each group and the various constraints and unique contextual characteristics in each case. Section 4 presents the pilot plan developed for supporting all piloting activities and ensuring an aligned approach is followed across the consortium. Section 5 outlines a set of metrics as key performance indicators (KPIs) for evaluating the piloting programme and the INCLUDEME platform. Furthermore, a series of Appendices provide a rich set of resources than can support all consortium partners during the scheduling, execution, and evaluation of pilots.

1.2 Work Package Leader and Task leaders

WP2 is led by P.A. College (PAC) and involves two tasks: Task 2.1: Selection of pilot groups (M3-M12) led by South West University "Neofit Rilski" (SWU), and Task 2.2: INCLUDEME pilot guidelines (M6-M12), led by P.A. College (PAC). Input from all consortium partners and the coordinators was explicitly requested and incorporated across various milestones.

1.3 Main Aim and Objectives

The main aim of WP2 is the selection of target groups and the planning of pilots which will be conducted under WP6. To attain this aim, the following objectives must be met:

(I) Carry out the selection of target groups & set up specific pilots.
(II) Define piloting guidelines & programme (Result R2.1) for each target group.
(III) Provide a pilot plan that will support piloting activities.
(IV) Establish effective metrics for evaluating the performance of the piloting programme.

Further to the overt objectives outlined above, during the transnational meetings the leaders of WP2 emphasised the need towards establishing a joined approach for reaching out to both DTGs and ITGs, in order to ensure a systematic and consistent process is adopted across the consortium, while still embracing contextual and methodological diversity. To achieve this goal, a variety of resources, research instruments, reporting documents, and artefacts (e.g., Interview/Focus Group Agenda, Reporting Matrix, Informed Consent Form, Table of Target Groups, Questionnaire, etc.) were produced and shared with all partners, inviting feedback and encouraging sharing of good practices and suggestions.

The following sections of this deliverable, discuss actions performed towards addressing each of the aforementioned WP2 Objectives. Supporting resources are provided as separate Appendices at the end of the report.

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2. Selection of Target Groups for Setting up Specific Pilots

2.1 Following an Aligned and Inclusive Approach Across the Consortium

To address the first objective of WP2, it was necessary to carry out the selection of target groups and in turn, set up specific pilots to engage them.

Based on the core principles of inclusion and diversity, during the initial stages of the project it was deemed important to follow an inclusive and aligned approach for carrying out the selection of target groups and in turn, set up specific pilots. For this purpose, a 'Guide' was created (and shared on OneDrive) to direct all consortium partners in the process of initiating and maintaining contact with the eight (8) Target Groups of the INCLUDEME project. Using a shared document, across all INCLUDEME Consortium members, ensures that partners maintain an aligned approach towards:
- Identifying individuals, groups, and organisations that fit in any of the Target Groups.
- Initiating contact with them and keeping records/evidence of this contact.
- Introducing the INCLUDEME project aims and objectives.
- Promoting the INCLUDEME platform (under development).
- Maintaining contact and inviting key informants from each Target Group to collaborate and participate in piloting sessions, training sessions, workshops, using and evaluating the platform and other activities, as appropriate.

To carry out the selection of target groups and set up specific pilots, one of the first actions implemented under WP2 was to invite and direct all consortium partners to identify and reach out to individuals and groups falling under the Direct and Indirect Target Groups. Partners identified interested parties, made initial contact, and briefed potential groups about the aims and objectives of INCLUDEME project. A **Project Brief (see Appendix A)** was created to ensure that key information is uniformly shared by all partners across all target groups. Partners used this Project Brief as a basis to introduce and promote the INCLUDEME project by providing an overview of INCLUDEME aims and objectives. The goal was to establish an initial contact with the target groups, but most importantly to engage and encourage individuals and organisations to participate in the pilots, to use and evaluate the INCLUDEME tools and platform, and participate in training sessions and workshops organised under INCLUDEME project. The Project Brief was translated to different languages as needed. It was subsequently shared via email and/or in hard copy (as needed) during preliminary contacts and meetings.

Having identified several individuals that could participate in the piloting phases of the project, partners made initial contact via telephone call or email. Subsequent contact was made via a range of methods: online meetings, emails, or physical meetings (arranged at the project partner's workspace, at special education schools, or at other mutually convenient locations). The meeting place and time was arranged according to the availability and convenience of involved parties, while also respecting the restrictions imposed due to the ongoing Covid-19 pandemic.

Following the initial contact and identification of potential piloting groups, all consortium partners were invited to indicate the number (or range) of individuals, families, organisations, etc. they have already contacted or expect to engage in the pilots to be organised under WP6. In addition, partners were asked to suggest an appropriate research method they would use to gather insights from the respective Direct or Indirect Target Group.

To manage this information at the consortium level, WP2 leaders created and shared a spreadsheet file entitled **'Table of Target Groups' (see Appendix B)** with all identified direct and indirect target groups. Based on previous empirical experience and research on learning disabilities, disadvantaged

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learners, inclusive education, and gamified learning approaches, some of the main target groups were further divided into sub-groups to enable a clearer picture of the available participants each member of the project consortium could initiate contact with and involve in the project piloting phase. This can in turn inform the design, development, and evaluation of the INCLUDEME platform by identifying the target (sub)groups to which the consortium (as a whole) has access to. This approach also provided a better insight into the (sub)groups that each consortium partner has access to and aims to involve in the planned piloting activities. Table 1. shows the classification of target groups and sub-groups.

Target Groups	Sub-groups
DTG1	Culturally, Socially, Economically, or other disadvantaged students
DTG2	Visual impairment/ Visual disability
	Hearing impairment/ auditory and/or speech disability
	Mobility problems/ motor disability
	Paralysis
	Dyspraxia
	Combined Physical & Intellectual disability
	Dyslexia
	Asperger's
	Autism
	ADHD
	Other
DTG3	High-school Leaders and Teaching staff
	University Leaders and Teaching staff
ITG1	Primary education organizations
	Secondary Education Organisations
ITG2	Families
ITG3	NGOs
ITG4	Public Authorities
ITG5	Policy Makers

Table 1. Classification of Direct and Indirect Target Groups into Sub-groups.

2.2 Provisional and Expected Numbers for all Target Groups

The 'Table of Target Groups' was uploaded on the shared OneDrive folder for easier access. All consortium partners responded promptly and provided the requested information (i.e., indicative number in each group or sub-group, as well as proposed research methods). The cumulative numbers were presented during the 4th Transnational Project Meeting (25th October 2021). Table 2 shows an updated record (at the time of writing this report) of the information. It should be noted that these numbers are provisional and dependant on the availability and agreement of cooperation between target group participants and consortium members. All partners were reminded to keep an archive of all communications and invitations for participation established with the respective target groups and individuals.

Target Groups	Provisional	Expected

DTG1	Socio-economically disadvantaged students (aged 14-24)	230	230
DTG2	Students with disabilities (Health-related needs)	219	180
DTG3	School leaders and teaching staff in high-schools and universities	198	220
ITG1	Primary and secondary education organizations	22	35
ITG2	Families	19	24
ITG3	NGOs	11	14
ITG4	Public authorities	27	45
ITG5	Policy makers	1	2

Table 2. Provisional Numbers vs. Expected Numbers for each Target Group

One of the risks identified early on was the challenge to achieve the expected numbers (as indicated on the Project Proposal and shown in the rightmost column in Table 2 above). A major factor is the Covid-19 pandemic, which makes it challenging to reach out to individuals, especially in the three (3) Direct Target Groups. Furthermore, given the fact that Higher Education Institutions (both public and private universities including the ones participating in the project consortium), do not typically enrol a high number of disadvantaged learners or learners with disabilities, it was deemed imperative to reach outside the consortium and its affiliated institutions to identify individuals and/or organisations that closely interact with the identified target groups.

This preliminary analysis had several benefits. First, it helped to get a clearer picture of the groups the members can reach out to, at consortium level. This information can inform the INCLUDEME platform, tools, learning materials and other artefacts to better include and engage these target groups. Secondly, it helped the consortium members to identify a common ground as to what the pilots will involve, and what methods and data gathering approaches will be utilised (several qualitative and quantitative methods were proposed including surveys, interviews, focus groups, etc). This can facilitate the process of setting up the pilots that will be executed as part of WP6. Additionally, given that different researchers are familiar with different research methods, while also keeping in mind that different methods are more appropriate for different target groups, the need to be systematic-yet-flexible was established among partners early on. Finally, initiating and establishing contact across the eight (8) target groups early in the process, created opportunities to set up collaborations to support the testing and piloting of the INCLUDEME platform.

3. Piloting Guidelines and Programme (Result R2.1) for Each Target Group

3.1 Considerations and Resources for Establishing the Piloting Guidelines

To establish and define the piloting guidelines a number of aspects were considered including: the suggested numbers provided on the 'Table of Target Groups', the challenge of seeking informed consent for disadvantaged and disabled learners; the specific needs, requirements, constraints, risks, and considerations related with each TG; the cultural and contextual diversity across the consortium, as well as the challenges imposed by the pandemic making it challenging to gain access to the target groups.

Based on the information provided by the partners on the 'Table of Target Groups', it is evident that even under the same target group, different partners proposed different methods to be used for identifying further requirements and insights from participants. For instance, for DTG1 (Disadvantaged learners) and DTG2 (Students with disabilities) the following methods were suggested across partners: questionnaires, online surveys, workshops/tutorials, and interviews, whereas for DTG3 (School leaders and teaching staff in high-schools and universities) interviews, focus groups, and workshops (including tutorials/training sessions and observation sessions) were suggested as the most appropriate, relevant, or useful methods. For the five Indirect Target Groups (ITG1-ITG5) the partners proposed the use of interviews, focus groups or workshops.

Given the diversity of the target groups and the uniqueness in each partner's approach, a set of **pilot guidelines** are formulated. These will serve as a guiding framework providing an overall structure for the pilots while also permitting the necessary agility based on several factors, including: the contextual and cultural circumstances and the geographic location where the pilot will be executed (in each of the member countries); the preferred research approach employed by each partner; the appropriateness of each method based on the individual participants; and the participants' unique characteristics, needs, requirements and preferences under each target group.

Like in all actions of the project, during pilots it is essential to ensure that an aligned approach is followed across the consortium for consistency and uniformity with regards to the methods/questions addressed when reaching out to the target groups. The same applies with regards to addressing the key ethical considerations and reporting approach in a consistent manner. Furthermore, establishing an aligned approach will allow for a more comprehensive evaluation of the pilots in line with the identified Key Performance Indicators (KPIs).

The guidelines are provided in the form of a recommended programme-agenda adjusted for each TG. The piloting guidelines and programme for each TG utilise the following components, which are provided as **key resources** readily available to INCLUDEME partners:
- **Project Brief** (Appendix A).
- **Table of Target Groups** (Appendix B – B1. DTGs and B2. ITGs).
- **Ethics Information Sheet and Informed Consent Form** (Appendix C).
- **Repository of Questions** *to be adapted for interviews, focus groups, questionnaires, or online surveys* (Appendix D).
- **Platform and Pilot Evaluation Questionnaire** *for gathering feedback from TGs after each pilot* (Appendix E).
- **Reporting Matrix** (Appendix F).
- **KPIs (metrics) for evaluating the performance of the piloting programme** (section 5 of this report).

The following **considerations** apply to ensure the quality of the proposed Piloting Programme:

- The identity of the INCLUDEME project promoted through introductory presentations during initial contacts with TGs or as part of the piloting activities must be aligned across all consortium partners, adjusted for each TG, and translated to the respective language as needed. The 'Project Brief' (Appendix A) is a starting point and sets the ground.
- Each partner chooses one of the alterative options discussed in the Piloting Guidelines and Programme outlined below based on a mutual agreement between researchers (consortium partners) and study participants (TGs). Each partner will aim to reach the numbers provisionally provided on the 'Table of Target Groups' (Appendix B) while also keeping in mind additional needs at consortium level.
- Depending on the age of the participants, their parents, legal guardians, or caretakers will need to provide informed consent and accompany the participants during the pilots. The 'Ethics Information Sheet and Informed Consent Form' (Appendix C) outline the key information to be shared before seeking informed consent.
- The 'Repository of Questions' (Appendix D) and the 'Platform and Pilot Evaluation questionnaire' (Appendix E) used by all partners following each pilot must have the same focus and incorporate questions aligned with the ones suggested to allow holistic thematic/statistical analysis across the consortium with the aim to establish a joint repository of comparable findings making it easier to produce joint, publishable results. Each partner may translate these documents in the native language as needed.
- Reporting throughout the piloting activities is essential as the findings and insights gathered will feed back to the design, development, and enhancement of the platform. The 'Reporting Matrix' (Appendix F) provides a suggested approach to documenting the insights gathered.

3.2 Overview of Piloting Guidelines and Programme for each Target Group

A dedicated WP2 meeting was conducted on 25th November 2021. All consortium partners were invited and representatives from each side participated to the meeting. The agenda of the meeting is available in **Appendix G**. All partners provided feedback and suggestions on the current version of the Piloting Programme. Following up from the meeting all suggestions and feedback were incorporated. The updated report was redistributed inviting all partners to review the proposed options to ensure that at least one of these options satisfies their needs and the specificities of the TGs they will reach out to. Table 3 presents the four (4) options that form the basis of the INCLUDEME piloting guidelines and programme, and these can be adjusted for each of the direct and indirect target groups.

Option Code	Description	Guidelines and Programme for inclusive education pilot set up and implementation
A	*Face-to-Face Pilot* followed by evaluation	A1: Introductory Presentation A2: Interactive Tutorial/Demonstration A3: Hands-on exploration A4: Data Gathering/Evaluation A5: Face-to-face pilot wrap-up
B	*Online Synchronous Pilot* followed by evaluation	B1: Introductory Presentation Online B2: Online Interactive Tutorial/Demonstration B3: Hands-on exploration B4: Data Gathering/Evaluation

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		B5: Online pilot wrap-up
C	**_Hybrid/Blended Pilot_** followed by evaluation	C1: Introductory Presentation Online C2: Online Interactive Tutorial/Demonstration C3: Hands-on exploration C4: Data Gathering/Evaluation C5: Online pilot wrap-up
D	**_Asynchronous Virtual Pilot_** followed by evaluation	D1: Introductory presentation and Tutorial/Demonstration D2: Hands-on exploration D3: Data Gathering/Evaluation

Table 3. Piloting Guidelines & Piloting Programme Options for Inclusive Pilot set up

Each of the four piloting options (A, B, C, D) are further elaborated in the following sub-sections.

3.3 Guidelines and Programme for Option A: Face-to-Face Pilot

This option can be employed if the TG participants can be physically present and collocated with the INCLUDEME partners executing the pilot. The face-to-face pilot can be in the form of an interactive workshop, tutorial/learning activity, seminar, or demonstration, depending on the TG and the context in each case.

- A1: Introductory Presentation – INCLUDEME partners deliver a presentation to introduce and promote INCLUDEME project (suggested duration: 30-45 minutes).
- A2: Interactive Tutorial/Demonstration – INCLUDEME partners run an interactive workshop/demonstration/tutorial to TG participants who are collocated (suggested duration: 1-2 hours). The purpose is to demonstrate the tools and capabilities of INCLUDEME platform. The demonstration is adjusted to, and focusing on, the aspects most relevant to the TG participants who join the session.
- A3: Hands-on exploration – TG participants have the opportunity to use the INCLUDEME platform on their own, engage in gamified learning, ask questions, seek advice and guidance from INCLUDEME partners who will facilitate the process helping the participants to explore the available tools (suggested duration: 1-2 hours)
- A4: Data Gathering/Evaluation – Feedback needs to be gathered from TG participants in order to: (a) evaluate the INCLUDEME platform at its current stage of development and (b) evaluate the piloting programme itself (i.e., their experience from participating in the face-to-face workshop/seminar/tutorial). See the recommended 'Platform and Pilot Evaluation questionnaire' (Appendix E). Feedback from TG participants can be gathered:
  - by asking them to fill-in a printed questionnaire (which can be handed out at the end of the piloting session),
  - by inviting them to submit an online questionnaire/survey (by sharing the link of the survey at the end of the online workshop/tutorial/seminar), or
  - by conducting focus group discussions (depending on the number of participants more than one focus groups can be arranged) and taking minutes of participants' comments (the focus group agenda can follow the same questions as those on the recommended questionnaire).

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- A5: Face-to-face pilot wrap-up – INCLUDEME partners conclude the piloting session, thanking the TG participants, and highlighting the key points/lessons learnt.

3.4 Guidelines and Programme for Option B: Online, Synchronous Pilot

The online pilot can be in the form of synchronous online interactive workshop, online tutorial/learning activity, or online seminar or demonstration depending on the TG and the context in each case. Participants connect to the scheduled online meeting from their individual locations at the same time.

- B1: Introductory Presentation Online – INCLUDEME partners deliver a presentation online to introduce and promote INCLUDEME project (suggested duration: 30-45 minutes).
- B2: Online Interactive Tutorial/Demonstration – INCLUDEME partners run an interactive workshop/demonstration/tutorial to TG participants who join online (suggested duration: 1-2 hours). The purpose is to demonstrate the tools and capabilities of INCLUDEME platform. The demonstration is adjusted to, and focusing on, the aspects most relevant to the TG participants who join the session.
- B3: Hands-on exploration – TG participants have the opportunity to use the INCLUDEME platform on their own, engage in gamified learning, ask questions, seek advice and guidance from INCLUDEME partners who remain online and facilitate the process helping the participants to explore the available tools (suggested duration: 1-2 hours)
- B4: Data Gathering/Evaluation – Feedback needs to be gathered from participants in order to: (a) evaluate the INCLUDEME platform at its current stage of development and (b) evaluate the piloting programme itself (i.e., their experience from participating in the online workshop/seminar/tutorial). See the recommended 'Platform and Pilot Evaluation questionnaire' (Appendix E). Feedback from TG participants can be gathered:
  - by asking them to fill-in an online questionnaire/survey (by sharing the link of the survey at the end of the online workshop/tutorial/seminar), or
  - by conducting a focus group discussion with all participants (depending on the number of participants more than one focus groups can be arranged) and taking minutes of participants' comments (the focus group agenda can follow the same questions as those on the recommended questionnaire).
- B5: Online pilot wrap-up – INCLUDEME partners conclude the online piloting session, thanking the TG participants, and highlighting the key points/lessons learnt.

3.5 Guidelines and Programme for Option C: Hybrid/Blended Pilot

The hybrid pilot combines online instruction with the physical attendance of the participants (it is a combination of options A and B). This option can be employed in cases where TG participants are conveniently collocated but due to travel or other restrictions the INCLUDEME partners cannot deliver the pilot face-to-face. A local facilitator/instructor is required to coordinate the TG participants who will be collocated. The TG participants will be able to participate in the pilot synchronously. The hybrid/blended pilot can be in the form of a facilitated online interactive workshop, online tutorial/learning activity, or online seminar or demonstration, depending on the TG and the context in each case.

- C1: Introductory Presentation Online – INCLUDEME partners deliver a presentation online to introduce and promote INCLUDEME project to a group of participants (suggested duration: 30-45 minutes).

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- C2: Online Interactive Tutorial/Demonstration – INCLUDEME partners run an interactive workshop/demonstration/tutorial to TG participants who are collocated with a local facilitator/instructor (suggested duration: 1-2 hours). The purpose is to demonstrate the tools and capabilities of INCLUDEME platform. The demonstration is adjusted to, and focusing on, the aspects most relevant to the TG participants who join the session.
- C3: Hands-on exploration – TG participants have the opportunity to use the INCLUDEME platform on their own, engage in gamified learning, ask questions, seek advice and guidance from INCLUDEME partners who remain online and facilitate the process helping the participants to explore the available tools (suggested duration: 1-2 hours)
- C4: Data Gathering/Evaluation – Feedback needs to be gathered from participants in order to: (a) evaluate the INCLUDEME platform at its current stage of development and (b) evaluate the piloting programme itself (i.e., their experience from participating in the hybrid/blended workshop/seminar/tutorial). See the recommended 'Platform and Pilot Evaluation questionnaire' (Appendix E). Feedback from TG participants can be gathered:
  - by asking them to fill-in a printed questionnaire (which the local facilitator/instructor can hand out at the end of the piloting session),
  - by inviting them to submit an online questionnaire/survey (by sharing the link of the survey at the end of the online workshop/tutorial/seminar), or
  - by conducting focus group discussions (depending on the number of participants more than one focus groups can be arranged) and taking minutes of participants' comments (the focus group agenda can follow the same questions as those on the recommended questionnaire). Focus groups can be performed online after the pilot or at the end of the piloting session if possible.
- C5: Online pilot wrap-up – INCLUDEME partners conclude the piloting session, thanking both the TG participants and the local facilitators/instructors, and highlighting the key points/lessons learnt.

3.6 Guidelines and Programme for Option D: Asynchronous Virtual Pilot

The asynchronous virtual pilot can be in the form of a video tutorial, which TG participants can watch at their own time and pace. This option is appropriate for cases where reaching the participants is not plausible due to any mobility, travel or other restrictions, health and safety issues, etc.

- D1: Introductory presentation and Tutorial/Demonstration – INCLUDEME partners share a pre-recorded video tutorial introducing the INCLUDEME project and demonstrating the INCLUDEME platform. Participants can watch this video at their own time and pace, asynchronously (suggested duration: 1-2 hours). The video can be translated to the language of the TG participants.
- D2: Hands-on exploration – TG participants have the opportunity to use the platform and through an annotated user-manual (which will be made available to the participants language) the participants are invited to engage in gamified learning and explore the available tools. A contact email or other communication channel should be suggested for participants to send their questions or request further information if and as needed.
- D3: Data Gathering/Evaluation – Feedback needs to be gathered from participants in order to: (a) evaluate the INCLUDEME platform at its current stage of development and (b) evaluate the piloting programme itself (i.e., their experience from the asynchronous video tutorial). See the recommended 'Platform and Pilot Evaluation questionnaire' (Appendix E). Feedback from TG participants can be gathered:

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- o by asking them to fill-in an online questionnaire/survey (by sharing the link of the survey at the end of the video and/or via email), or
- o by arranging a focus group or interview at a mutually convenient time and taking minutes of participants' comments (the focus group/interview agenda can follow the same questions as those on the recommended questionnaire).

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4. Pilot Plan for Supporting Piloting Activities

4.1. Purpose of the Pilot Plan and Clarifications

A Pilot Plan was put together to support the piloting activities. It is emphasised that the instructions outlined below should be considered simply as *recommendations* that partners can follow, rather than a rigid, fixed plan. Therefore, the proposed pilot plan is portrayed in a way which permits the necessary flexibility and adaptability according to the target group participating in each Pilot and respective the participants' unique sets of needs and requirements. Furthermore, given that the INCLUDEME project focuses on disabled and disadvantaged learners, the aim is to collect only what is necessary and minimise disruption as much as possible. It is also noted that participants under the age of 18 years old, will not participate, provide information, or submit questionnaires/surveys without the prior informed consent from their parents/guardians/family members and/or teachers and school leaders (where applicable), in accordance with GDPR (See Appendix C for information sheet and informed consent approval in line with GDPR).

4.2. Pilot Plan Structure

Pilots can be conducted both during early stages of the INCLUDEME platform development to gather initial insights and after the INCLUDEME implementation has been completed for verification and validation purposes. Both early-stage and late-stage pilots (conducted during the development of the INCLUDEME platform) may follow the same structure/workflow outlined in the infographic illustrated in Figure 2 below. Table 4 further elaborates on the stages of the Pilot Plan.

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(1) Initial contact: *Invite individuals to participate (M9-M12)*

(2) Pre-pilot set up: *Conduct initial meetings to gather insights (M9-M12)*

(3) Seek informed consent: *Share Ethical Considerations Information Sheet and Informed Consent Form (M9-M12)*

(4) Schedule pilot implementation: *Arrange the pilot date, time, venue (M12-M16)*

(5) Opening presentation: *Prepare and deliver a presentation to introduce and promote the platform (during the pilot).*

(6) Run a demo of the platform: *Deliver step-by-step synchronous or asynchronous demonstration, tutorial, or wor kshop (during the pilot)*

(7) Hands-on exploration: *TGs participants to use the tools, games and engage with the resources available through INCLUDEME platform (during the pilot)*

(8) Evaluation: *Gather data on user satisfaction with INCLUDEME platform (after the pilot)*

(9) Closing/pilot wrap-up: *Conclude the online piloting session, thanking everyone for their participation and contributions (after the pilot).*

(10) Post-workshop reporting: *Summarise outcomes, insights, and experiences (1-2 weeks following the pilot)*

(11) Post-workshop follow-up: *Thank participants and provide further support/resources (1-2 weeks following the pilot)*

(12) Pilot evaluation: *Use the KPIs (evaluation metrics) established for evaluating the performance of the pilot (under WP6)*

Figure 2. Pilot Plan Workflow

Pilot Plan Stage		Description	Time Frame
1	**Initial contact**	Invite individuals to participate – see Project brief (Appendix A).	M9-M12
2	**Pre-pilot set up**	Conduct initial meetings (online, face-to-face, or blended) to gather initial insights – see Repository of Questions (Appendix D) and Reporting Matrix (Appendix F).	M9-M12
3	**Seek Informed Consent**	Share Ethical Considerations Information Sheet (Appendix C1) and Informed Consent Form (Appendix C2).	M9-M12 or prior to Pilot
4	**Schedule pilot implementation**	Arrange the pilot date, time, venue.	M12-M16
5	**Opening** *[Introductory Presentation]*	Prepare and deliver a presentation to introduce and promote the platform.	under WP6 (during the pilot)
6	**Demo** *[Interactive Tutorial/ Demonstration]*	Step-by-step demonstration/Tutorial/workshop on how to use the platform (video tutorial or live demonstration depending on the Option (A, B, C, or D) adopted.	under WP6 (during the pilot)
7	**Hands-on exploration**	TGs participants are invited to use the tools, games and engage with the resources available through INCLUDEME platform.	under WP6 (during the pilot)
8	**Evaluation** *[Data Gathering]*	Questionnaires/Surveys/Focus groups to gather feedback on user satisfaction and needs/requirements/suggestions that can inform further development of INCLUDEME platform – see Repository of Questions (Appendix D) and Questionnaire (Appendix E). Ideally allocate some time at the end of the workshop or as soon as possible within 1 week following the workshop/pilot.	following the pilot
9	**Closing** *[pilot wrap-up]*	Conclude the online piloting session, thanking everyone for their participation and contributions.	following the pilot
10	**Post-workshop reporting**	Summarise the outcomes, insights, and experiences – use the Reporting Matrix (Appendix F).	1-2 weeks following the pilot
11	**Post-workshop follow-up**	Engage with TG participants after the workshop to thank them for their participation and help with providing further support/resources or sharing news and updates/dissemination.	1-2 weeks following the pilot
12	**Pilot Evaluation:**	Use the KPIs (evaluation metrics) established for evaluating the performance of the piloting programme, to evaluate each pilot – see KPIs (Appendix G).	under WP6

Table 4. Piloting Plan Stages and Time Frame

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5. KPIs - Metrics for Evaluating the Performance of the Piloting Programme

To ensure the quality of the pilots and to evaluate the performance of the piloting programme, a set of Key Performance Indicators (KPIs) are established. In establishing the KPIs particular emphasis is placed on identifying measurable and objective metrics while also capturing the participants' perspectives. Table 5 lists the KPIs for INCLUDEME pilots. The KPIs are grouped under three (3) categories:

    (a) Platform-related KPIs.
    (b) Piloting Programme-related KPIs.
    (c) User Evaluation-related KPIs.

Category		Key Performance Indicator (KPI)	Description	Source / Tool	Comments
(a) Platform-related	1	**INCLUDEME Platform hits**	No. of users who accessed the platform, including visitors	Platform (Gamified Authoring)	Both unique platform hits and returning users/visitors will be traced and extracted.
	2	**Total no. of registered users**	No. of users who created an account on the platform	Platform	The number of registered users will be extracted for each sub-group: Teachers / Students / Parents for further analysis.
	3	**Total no. of new games created with the authoring tool**	No. of new games created	Platform	The number of games will be extracted for the 2 main student target groups: students with disability / disadvantaged learners. The metric will be extracted before and after the pilots.
	4	**Total no. of games customised using the authoring tool**	No. of existing games modified/customised	Platform	It will be divided for the 2 main student target groups: students with disability / disadvantaged learners. The number of games will be extracted for the 2 main student target groups: students with disability / disadvantaged learners. The metric will be extracted before and after the pilots.
	5	**Total no. of hits per game(s)**	No. of hits for a specific game	Platform (Resource Centre)	This metric will be extracted both for the games created with the Authoring Tool and standalone games. Further analysis will help extracting the most popular game(s).

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	6	**Total no. of games made public**	No. of games made public and sent to Sandbox	Sandbox	Further analysis will provide an indication towards making games openly and publicly available.
	7	**Total no. of resources**	No. of resources in Resource centre	Platform (Resource Centre)	This metric will provide an indication of the richness of the available resources at different points in time/development stages.
	8	**Total no. of accessible resources**	No. of resources in Resource centre with accessible flag	Platform (Resource Centre)	This number will show the how many of the available resources satisfy accessibility criteria. The number will be traced for different types of disability/accessibility combinations.
(b) Piloting Programme-related	9	**Total No. of Pilots set up**	No. of pilots executed	Piloting Program	This metric will be extracted and analysed: • Per country • Per partner • Per target group • Total • Average duration (time)
	10	**Total no. of participants taking part in a pilot**	No. of participants participating in each pilot	Piloting Program	This metric will be extracted and analysed: • Per country • Per partner • Per target group • Per pilot • Total / Average
(c) User Evaluation-related	11	**Platform Ease of use**	The overall ease of use as rated on the Pilot Evaluation Questionnaire	Evaluation Questionnaire / Survey following each Pilot	This metric will be extracted and analysed: • Per country • Per partner • Per target group • Per pilot • Average
	12	**Pilot evaluation**	The overall satisfaction of participants as rated on the Pilot Evaluation Questionnaire	Evaluation Questionnaire / Survey following each Pilot	This metric will be extracted and analysed: • Per country • Per partner • Per target group • Per pilot • Average

Table 5. KPIs for INCLUDEME Pilots

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6. CONCLUSIONS

This report outlines the main aim, tasks, and objectives of WP2. In particular, it describes the process followed for the selection of target groups for setting up specific pilots. The piloting guidelines and programme for each target group (Result R2.1) are also established of WP2. Followed by a detailed Pilot Plan developed for supporting all piloting activities and ensuring an aligned approach is followed across the consortium. Furthermore, the set of metrics established as key performance indicators (KPIs) for evaluating the piloting programme and the platform are listed. Finally, a series of Appendices provide a rich set of resources than can support all consortium partners during the scheduling, execution, and evaluation of pilots with both disabled and disadvantaged learners. The pilots aim at involving learners in these groups as well as their teachers/schooling and family environment, and the extended community context. The pilots will serve both as a source of input informing the ongoing development of the platform as and as an evaluation of the experiences and perceptions of the target group participants.

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7. Appendix A – Project Brief

INCLUDEME Project Brief

Introduction

We are contacting you in order to introduce the European Funded Project ERASMUS+ EACEA/34/2019 - Social Inclusion and Common Values - Action: the contribution in the field of education and training) entitled: 'INCLUDEME - Inclusive digital environments to enable high-quality education and training for disadvantaged learners'. The project is co-funded by the European Commission through the Erasmus+ programme.

Project Description

The overall objective of the project is to nurture and implement inclusive education practices across educational, economic, social, and cultural contexts. Based on our prior expertise in Educational Technology we aim to create customisable, user-centred learning environments. Our aim is to employ the capabilities and facilities provided through accessible information technologies and gaming approaches to construct unique experiences that engage, motivate, and increase the performance of both disadvantaged and disabled learners.

At an individual level, the INCLUDEME project aims to contribute by improving the lives of disadvantaged and disabled learners and provide them inclusive educational opportunities through accessible digital learning environments. Our goal is 'accessibility and inclusivity for all'. On the same line we also appreciate the need for improving the teaching staff skills in relation to supporting technologies in inclusive education. At a community level, this research project aims to increase awareness around equality issues to support inclusive education.

The INCLUDEME project takes a holistic approach, and therefore we invite School Leaders and Teaching Staff in High Schools and Universities, Primary and Secondary Education Organisations, Families, NGOs, Public Authorities, Policy makers, as well as individuals in the main groups (socio-economically disadvantaged students and students with health-related needs (physical and/or intellectual disabilities) to participate in the Project.

Invitation to Participate

We invite you to participate as informants and collaborators in the project to help better understand the needs and requirements of disabled and disadvantaged learners. This understanding will help greatly in informing the development of the INCLUDEME tools and platform. You will have the opportunity to use these tools, participate in workshops and receive training to meet your objectives as a key stakeholder. Your participation will be anonymous and all measures for data protection and data privacy will be maintained in accordance with GDPR.

The INCLUDEME consortium looks forward to a fruitful collaboration and exchange of ideas for the benefit of disadvantaged and disabled learners. For more details about the project please visit the official project website via the following link: https://includeme-project.eu/gr/ where you can find newsletters, videos, contact information and other relevant content. Thank you for your consideration.

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8. Appendix B – Table of Target Groups

DIRECT TARGET GROUPS		Total	Expected numbers
DTG1	Socio-economically disadvantaged students, including Roma (aged 14-24)	230	230
DTG2	Students with disabilities (Health-related needs)	219	180
DTG3	School leaders and teaching staff in high-schools and universities	198	220
INDIRECT TARGET GROUPS			
ITG1	Primary and secondary education organizations	22	35
ITG2	Families	19	24
ITG3	NGOs	11	14
ITG4	Public authorities	27	45
ITG5	Policy makers	1	2

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ANNEX B1. DIRECT TARGET GROUPS

Note: Numbers are an estimate proposed during pilot set up. Final numbers depend on agreement of cooperation between charities/special schools/etc. and Consortium members.

		DTG1							DTG2							DTG3						
		ATS	HFC	BIBA	UTH	PAC	SWU	AAP	ATS	HFC	BIBA	UTH	PAC	SWU	AAP	ATS	HFC	BIBA	UTH	PAC	SWU	AAP
DTG1	Culturally, Socially, Economically, or other disadvantaged students	45	135	5	15		10	20														
DTG2	Visual impairment/ Visual disability									5	10											
	Hearing impairment/ auditory and/or speech disability									25	10											
	Mobility problems/ motor disability									5		12										
	Paralysis									5												
	Dyspraxia									5												
	Combined Physical & Intellectual disability									5			2									
	Dyslexia									20	8											
	Asperger's									5												
	Autism									5												
	ADHD									20	2											
	Other								55						20							
DTG3	High-school Leaders and Teaching staff																	2	15	5	10	6
	University Leaders and Teaching staff															125			20	5	10	
	Sub-total per group:			230							219							198				
	Expected:			230							180							220				

ANNEX B2. INDIRECT TARGET GROUPS

Note: Numbers are an estimate proposed during pilot set up. Final numbers depend on agreement of cooperation between charities/special schools/etc. and Consortium members.

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		ITG1							ITG2							ITG3							ITG4							ITG5						
		ATS	HFC	BIBA	UTH	PAC	SWU	AAP	ATS	HFC	BIBA	UTH	PAC	SWU	AAP	ATS	HFC	BIBA	UTH	PAC	SWU	AAP	ATS	HFC	BIBA	UTH	PAC	SWU	AAP	ATS	HFC	BIBA	UTH	PAC	SWU	AAP
ITG1	Primary education organizations	6		1		2	1	2																												
ITG1	Secondary Education Organisations	6		1		2	1																													
ITG2	Families								8				3	5	3																					
ITG3	NGOs																5			2	2	2														
ITG4	Public Authorities																						24		1			2								
ITG5	Policy Makers																																		1	
	Sub-total per group:	22							19							11							27							1						
	Expected:	35							24							14							45							2						

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9. Appendix C – Ethics Information Sheet and Informed Consent Form

ANNEX C1. INFORMED CONSENT FORM TEMPLATE

Informed Consent Form for INCLUDEME Project

Name of Principal Investigators: *[Insert name(s) of main researchers/investigators]*

Name of Organization: *[Insert the full name of the Project Partner]*

Sponsor: ERASMUS+ EACEA/34/2019 - Social Inclusion and Common Values - Action: the contribution in the field of education and training.

Name of Project: INCLUDEME - Inclusive digital environments to enable high-quality education and training for disadvantaged learners

This Informed Consent Form has two parts (attached):
- **Part A: Ethics Information Sheet** to inform potential participants about INCLUDEME Project.
- **Part B: Certificate of Informed Consent** (to be signed, giving informed consent to participate).

You will be given a copy of the full Informed Consent Form.

Invitation to Participate

You are invited to participate in the Project as an informant representing one or more of the following target groups:
1. Socio-economically disadvantaged students
2. Students with health-related needs (physical and/or intellectual disabilities)
3. Teaching staff in high-schools or Universities
4. School Leaders in high-schools or Universities
5. Primary and Secondary Education Organisations,
6. Families
7. NGOs
8. Policy makers

Providing your consent to participate in the project may include discussions about how INCLUDEME platform can help implement inclusive education practices across educational, economic, and socio-cultural contexts. You may be contacted by the lead investigators (identified in page 1 of this form) to participate in interviews or focus groups aiming to collect information about learning needs, accessibility options and other related topics from your point of view.

A number of piloting sessions as well as dissemination sessions are also planned where participants will be invited to use the INCLUDEME platform that will be developed based on the gathered information. If you agree to participate you will have the opportunity to attend presentations and training sessions, as well as use and evaluate the educational games, artefacts and materials that will be developed as part of the project. Your perspectives and feedback on inclusivity, accessibility, and educational facets is invaluable for the project success.

Participation is voluntary and can be withdrawn at any time. Before you decide whether or not to take part, it is important for you to understand why the research is being conducted and what it will involve. Please take time to read the following information carefully.

ANNEX C2. INCLUDEME ETHICS INFORMATION SHEET

Part A. ETHICS INFORMATION SHEET

Information on the processing of personal data during piloting activities executed under the European Funded Project ERASMUS+ EACEA/34/2019 - Social Inclusion and Common Values - Action: the contribution in the field of education and training) entitled: 'INCLUDEME - Inclusive digital environments to enable high-quality education and training for disadvantaged learners'.

1. Introduction – Project Description

You are invited to take part in the research project entitled: INCLUDEME - Inclusive digital environments to enable high-quality education and training for disadvantaged learners.

The overall objective of the project is to nurture and implement inclusive education practices across educational, economic, social, and cultural contexts. Based on our prior expertise in Educational Technology we aim to create customizable, user-centred learning environments. Our aim is to employ the capabilities and facilities provided through accessible information technologies and gaming approaches to construct unique experiences that engage, motivate, and increase the performance of both disadvantaged and disabled learners.

At an individual level, the INCLUDEME project aims to contribute by improving the lives disadvantaged and disabled learners and provide them inclusive educational opportunities through accessing digital learning environments. Our goal is 'accessibility and inclusivity for all'. On the same line we also appreciate the need for improving the teaching staff skills in relation to supporting technologies in inclusive education. At a community level, this research project aims to increase awareness around equality issues to support inclusive education.

The INCLUDEME project takes a holistic approach, and this is why, through this Informed Consent Form, we invite Teachers, School Leaders, Primary and Secondary Education Organisations, Families, NGOs, Policy makers, as well as individuals in the main groups (socio-economically disadvantaged students and students with health-related needs (physical and/or intellectual disabilities) to participate in the Project.

The INCLUDEME consortium looks forward to a fruitful collaboration and exchange of ideas for the benefit of disadvantaged and disabled learners. For more details about the project feel free to visit the official project website where you can find newsletters, video, and other relevant content.

Official Project website: https://includeme-project.eu/

Kindly read the information and project description below and consider providing your consent to participate in the project. Your participation will be anonymous and all measures for data protection and data privacy will be maintained in accordance with GDPR.

2. Legal Basis for the Processing of Personal Data

The project is co-funded by the European Commission through the Erasmus+ programme, under ERASMUS+ EACEA/34/2019 - Social Inclusion and Common Values - Action: the contribution in the field of education and training.

The INCLUDEME project members, (hereinafter the Consortium), take the legal and secure processing of your personal data very seriously. Data gathering is carried out in compliance with the principles of personal data protection, imposed by Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of individuals with regard to the processing of personal data and on the free movement of such data (General Data Protection Regulation - GDPR), namely the legality, objectivity, and transparency of the processing, minimisation of data, accuracy, limitation of the storage period, integrity, and confidentiality and, finally, accountability. The legal basis for data processing is that this processing is needed for the Consortium to perform the necessary research tasks assigned to it under the EU funded project ERASMUS+ EACEA/34/2019. The Consortium is responsible for the processing of personal data for the purpose described below.

3. What is the Purpose of Processing Personal Data and How will the Data be used?

The Consortium will gather data from individuals and/or representatives of groups or institutions in any of the following eight (8) target groups: Socio-economically disadvantaged students; Students with health-related needs (physical and/or intellectual disabilities); Teaching staff in high-schools or Universities; School Leaders in high-schools or Universities; Primary and Secondary Education Organisations; Families; NGOs; and Policy makers. The purpose of gathering and processing data from these groups is to provide insights into the needs and requirements of disabled and disadvantaged learners from varied viewpoints towards nurturing inclusive education practices and implementing accessible tools and educational gamified applications, that will be available across educational, economic, social, and cultural contexts. The results of the research project will be utilised to improve the INCLUDEME platform. The researchers also intend to use the data in related academic papers and presentations. The data that will be gathered and will be anonymised and no private data will be published anywhere. Informed consent will be sought before any data is processed. See the **Certificate of Informed Consent** below.

4. What type of Data will be Processed?

Within the aforementioned framework, and for the purposes outlined above, the following types of data will be gathered, recorded or processed:

- Demographic data of the target groups: gender, date or birth, natural languages, nationality.
- Educational background: educational level, level of study, subject of study, degrees, foreign languages.
- Work-related and professional background: years of expertise in the current capacity/role
- Individual Perspectives, viewpoints, expert opinions, level of satisfaction, suggestions and other subjective data gathered through interviews, focus groups, surveys, questionnaires, or other valid research methods.

5. Who has Access to the Data?

The INCLUDEME Consortium, including all participating researchers are authorised to handle data processing and have access to any personal data gathering/processing activities framed within the aforementioned project. All involved parties on behalf of the Consortium are aware of all important information for the safe handling and processing of your personal data. Data will be accessible to researchers as well as software development/IT companies that will be participating in the design, development, and testing and evaluation of the INCLUDEME platform. Those who process your data are informed and committed in advance to the confidentiality of the data, are aware of and follow our instructions regarding the processing of personal data and take all appropriate measures to protect them. Your personal data will not be transferred or shared to third parties.

6. What are the Possible Risks of Participating in this Research?

We do not anticipate any risks to participation in this study.

7. Will What I Say in This Study be Kept Confidential?

All information about you as an individual and/or the information you provide for the organisation or group you represent, will be kept strictly confidential. Data will be stored electronically, and confidentiality, privacy and anonymity are ensured in the collection, storage, and publication of research material throughout.

8. How Long will the Data be Kept for?

Your personal data is retained only for a reasonable period of time required by the nature of the data processing and only for as long as is required to achieve that purposes of the INCLUDEME project, unless otherwise required by law.

9. Is my Participation Obligatory?

Participation is voluntary. It is up to you to decide whether or not to take part. If you do decide to participate, please sign the attached Informed Consent Form. If you decide to take part you are still free to withdraw at any time. You do not have to answer any questions if you choose, and can end your participation in the study at any point, by cancelling or terminating the meeting (either physical or online) or by closing the browser with the online survey/questionnaire.

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10. Your rights and how to use them

As a Data Subject you have the following rights:

• Right of access to personal data.

• Right to correct inaccurate personal data.

• Right to delete / right to forget.

• Right to portability of your Data.

• Right to restrict processing.

• Right to object to the processing of your Data.

In case: a) you consider that your request has not been sufficiently and legally satisfied or b) you consider that the right to protection of your personal data is violated by some processing we carry out, you have the right to file a complaint to the Personal Data Protection Authority of your Country.

11. Who can I Contact for More Information About This Project?

If you wish to receive further information regarding the processing of your personal data or to use any of the above rights, you can contact the representative of the Consortium who has reached out to you and contacted you, with a description of your request and we will take care to examine it and answer you as soon as possible. If your request cannot be fulfilled, the Consortium partner will forward your request to the Personal Data Protection Officer of the Consortium or INCLUDEME Project Coordinator.

12. Conclusion

We have taken all the appropriate organisational and technical measures to secure and protect your data from any form of accidental or improper processing. All involved parties processing your personal data have received appropriate guidance, and information of the ethical and legal processing of your data. The measures we take are reviewed and amended at regular intervals or when deemed necessary based on new needs and technological developments.

Thank you for your time in reading this information sheet and your consideration to participate in the INCLUDEME project.

ANNEX C3. CERTIFICATE OF INFORMED CONSENT

Part B: Certificate of Informed Consent

I have read the above information, or it has been read to me. I have had the opportunity to ask questions about it and any questions I have asked have been answered to my satisfaction. A copy of this **Informed Consent Form** has been provided to me. I consent voluntarily to participate in INCLUDEME PROJECT.

Notes:

1. *If the Form is submitted electronically via email, the email to be retained as evidence.*
2. *The Form may be completed by a caretaker/guardian/family member/representative of the participant if they have the authority to do so. The caretaker/guardian/family member/representative can sign on behalf of the participant.*

Name of Participant: _____

Please use the second column to indicate (tick ü) which of the following target groups you belong to or represent. You may select more than one (if applicable):

Target Groups	(tick ü)
1. Socio-economically disadvantaged student	
2. Student with health-related needs (physical and/or intellectual disabilities).	
3. School leader or teaching staff in high-school or University	
4. Primary or Secondary Education Organisation	
5. Family of disadvantaged or disabled learners	
6. Non-Governmental Organisation (e.g., Non-Profit Organisations, Institutions, Committees)	
7. Public authorities	
8. Policy Maker	

*Signature:*_____   Date: _____

If signed on behalf of the participant provide your name and signature below:

*Full Name:*_____

*Signature:*_____   Date: _____

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10. Appendix D – Repository of Questions

The purpose of contacting interviews, focus groups, questionnaires, or online surveys is to understand the experiences and perceptions of key stakeholders comprising the Indirect Target Groups (Teaching staff in high-schools or Universities; School Leaders in high-schools or Universities; Primary and Secondary Education Organisations; Families; NGOs; Public authorities; Policy makers), as well as Individuals in the main, Direct Target Groups (Socio-economically disadvantaged students; Students with health-related needs (physical and/or intellectual disabilities); School leaders and teaching staff in high-schools and universities).

The main objective is to enhance educational provision to students with disabilities and disadvantaged students while supporting teachers, educational leaders, and families.

Draft Interview Agenda (to be adapted for each Target Group)

Section A – Establishing a common ground

A.1. Introduce the project (use the **Project Brief** provided in Appendix A)

A.2. Adjust the discussion (and subsequent questions) to the particular Target group and/or to individual role (see Table 1 for the list of Target Groups). For example:

- *We would like to ask you some questions regarding the educational methods and techniques for organizing the learning process in a digital environment... We are interested to hear your views about the implications and challenges involved in creating new policies for inclusive education…*

A.3. Clarify expected duration. An initial interview/focus group could take approximately 40-60 minutes.

A.4. Emphasise that participation is voluntary, introduce and sign the Informed Consent Form as appropriate (use the **Informed Consent Form** provided in Appendix C). Explain that the informant may decline answering any questions without giving a reason and without consequences of any kind. Request permission for audio recording and explain that the data/insights gathered will be anonymous and will be used only for scientific purposes.

Section B – Questions

Questions are grouped under 4 thematic categories:

1) Economic, social, and cultural context.
2) Accessibility & Inclusivity in Education.
3) Educational needs and Educational Technologies.
4) Use of games in education.

Important Note: All information regarding the questions below to be anonymously recorded on the Reporting Matrix (provided in Appendix F)

1)	**Economic, social, and cultural context**

1. Target group id: DTG1, DTG2, DTG3, ITG1, ITG2, ITG3, ITG4, ITG5 (see page 1).
2. Demographic information (gender, age group, nationality/country, job title, education level, etc. as appropriate. All private information to be anonymously recorded on the Reporting Matrix).
3. Aspects related to the role/job/duties of the participant (i.e., for teachers: what do you teach, at which grade level, how many years have you been working as a teacher, some information related to your school/University, and so on).

2)	**Accessibility & Inclusivity in Education**

1. Do you have students/colleagues/children/family members with disabilities or who are disadvantaged learners? If yes, can you describe your experiences of working with/teaching/educating students with disabilities/ disadvantaged students?
2. What are the main aspects required to make a classroom inclusive for special needs students?
3. What approaches do you need to help special needs of your students/ colleagues/children/family members with disabilities to increase their communication and social interaction?
4. What activities do your students/colleagues/children/family members enjoy? What are their talents, likes and interests?
5. As a teacher/member of NGO/policy making organization or authority/family member, etc. do you have any special requests that we need to take into account in order to design the INCLUDEME platform in the most optimized way?
6. Which types of disabilities or groups of learners would you wish to see more support for, based on your experiences?

3)	**Educational needs and Educational technology**

1. What is your opinion about using technologies in the learning process?
2. Are there any learning technologies available in your school/university/organisation?
3. Do you use learning technologies in your teaching/work?
4. How much time and effort do you spend preparing content for your classes?
5. Which of the technological platforms and tools do you prefer during the teaching process? What are the main reasons for your preference?
6. What are the main difficulties you encounter while using technologies and new technological platforms?
7. Do you prepare learning content for students with special needs? If yes, how do you prepare accessible content?
8. What kind of guidance, support materials, training, workshops would you expect from INCLUDEME project for the benefit of the learners, teachers, and all supportive structures across educational, economic, social, and cultural contexts?

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4)	Use of games in education

1. As a teacher/parent/family member/leader, what is your view towards the games-based learning approach?
2. What type of skills do you think playing digital educational game can students with special needs and disadvantaged learners develop?
3. Do you think digital games have a place in education? How do you see the future of playing digital games in the classroom?
4. How can playing digital educational games help students with disabilities/ disadvantaged students?
5. Do you use gamified learning experiences as part of your classes?
6. How do students feel when playing games with learning purpose?
7. What are the aspects that keep learners motivated to play serious games for learning purposes?

Wrap-up and establishment of follow-up meeting

1. Would you be interested to participate in workshops and training that will be organised under the INCLUDEME project?
2. Would you be interesting to use the INCLUDEME platform to give us some feedback on how to improve it?
3. Are there any ideas or suggestions you would like to share or something else to add?

Thank you for your invaluable contribution to this project.

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11. Appendix E – Platform and Pilot Evaluation Questionnaire

The following Questionnaire includes a set of recommended questions for gathering feedback following each Pilot. All partners need to include an Evaluation / Data Gathering process at the end of each pilot as this presents a genuine opportunity to evaluate both the INCLUDEME platform (at its current state for development) and the piloting programme itself.

Irrespective of which of the Piloting Options (A, B, C, D) is employed, all partners need to create the Evaluation Questionnaire based on the set of Questions provided below.

Notes:

- The Evaluation Questionnaire can be translated in the participants' native language as needed.

- The Evaluation Questionnaire can be created as an online form and the link can be shared with the participants at the end of the Pilot (either as part of the closing phase of the Pilot or shortly after the piloting session). Alternatively, the Evaluation Questionnaire can be shared as a hard copy where the pilots take place face-to-face with physical attendance of the participants.

- In case the participants themselves cannot fill the questionnaire themselves an adjusted approach needs to be followed (either conducting an interview or focus group). In the latter case, the same questions should still be addressed to ensure that all key evaluation information is gathered and documented. This will ensure that a joint consortium-wide repository of findings can be maintained and analysed. It is therefore emphasised that the same focus needs to be followed irrespective of the research/evaluation methods employed, to enable the researchers involved to centralise the feedback after the pilots and extract conclusions and cross-country comparisons.

- The questions can be adjusted per Target Group, but it is also important to keep the Questionnaire aligned to ensure consistency across partners/countries.

- At a minimum, the last four open-ended questions should be included, and the responses should be translated accordingly.

Platform and Pilot Evaluation Questionnaire

This questionnaire aims to gather insights on the effectiveness, scope, and range of features of the INCLUDEME platform from the perspective of educators that work with students with disabilities. Furthermore, the questionnaire attempts to gauge the compatibility of the proposed platform and the established teaching methods of special education teachers.

The information you provide will only be used for the purpose of this analysis and will not be shared directly with third parties.

Thank you for your participation and support.

The work presented herein is part of the project entitled "INCLUDEME - Inclusive digital environments to enable high-quality education and training for disadvantaged learners". The INCLUDEME project is funded under the Erasmus+ Program of the European Union, Grant Agreement ERASMUS+ EACEA/34/2019 - Social Inclusion and Common Values - Action: the contribution in the field of education and training.

(A) Educator's General Information	
1. Subjects/classes taught.	
2. Years of experience as a special education teacher/ trainer.	
3. Age groups of students under your tutelage.	?
4. Disabilities of students under your tutelage.	☐ Visual impairment/Visual disability ☐ Hearing impairment/auditory and/or speech disability ☐ Mobility problems/ motor disability o Paralysis o Dyspraxia o Combined Physical & Intellectual disability o Dyslexia o Asperger's o Autism o ADHD o Other, please specify:

	1	2	3	4	5
5. The use of computer-based technology in special education classes is essential.	**1** Strongly disagree	**2**	**3**	**4**	**5** Strongly agree
6. I have access to the Internet in all my classes.	**1** Never	**2** Rarely	**3** Occasionally	**4** Very Frequently	**5** Always

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7. I use games as an educational tool in my special education classes.	**1** Never	**2** Rarely	**3** Occasionally	**4** Very Frequently	**5** Always

(B) Educator's Opinion on the Pilot					
1. The introductory presentation was informative and effective.	1 Strongly disagree	2	3	4	5 Strongly agree
2. The INCLUDEME website is well designed (based on accessibility criteria)	1	2	3	4	5
3. The INCLUDEME website provides easy access to supporting material.	1	2	3	4	5
4. The INCLUDEME platform is innovative.	1	2	3	4	5
5. The games afforded by the platform meets the educational needs of all students under my tutelage.	1	2	3	4	5
6. The accessibility tools provided by the platform are complete (covers all range of your needs based on their disabilities) and effective	1	2	3	4	5
7. I have observed an increase in my students' level of engagement in class while using this platform.	1	2	3	4	5
8. How satisfied are you with the instructor support materials listed below?	1 Highly Dissatisfied	2 Dissatisfied	3 Neutral	4 Satisfied	5 Highly Satisfied
Leaflets					
Videos					

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	1	2	3	4	5
Presentations					
Workshops					
Newsletter					
9. Please rate the effectiveness of the types of games supported by the platform listed below:	1 Completely Ineffective	2 Needs Development	3 Somewhat Effective	4 Effective	5 Highly Effective
Memory games					
Language games					
Math games					
other					
10. Please rate the suitability of the platform for teaching students with the following disabilities:	1 Completely Unsuitable	2	3	4	5 Highly Suitable
Visual impairment/ Visual disability					
Hearing impairment/ speech disability					
Mobility problems/ motor disability					
Paralysis					
Dyspraxia					
Physical & Intellectual disability					
Dyslexia					
Asperger's					
Autism					
ADHD					
11. Please rate the INCLUDEME platform in the following areas, according to your experience.	1 Highly Dissatisfied	2 Dissatisfied	3 Neutral	4 Satisfied	5 Highly Satisfied
Ease of use					

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	1	2	3	4	5
Effectiveness					
Innovativeness					
Look and feel					
Help & user guidance					
12. The platform is functioning as intended, is fast and responsive.	1 Strongly disagree	2	3	4	5 Strongly agree
13. I was able to quickly and easily customize the platform to fit my specific needs.	1	2	3	4	5
14. I was able to quickly and easily create my own games on the platform using the gamified lesson plan (GLP)	1	2	3	4	5
15. I need a comprehensive tutorial before I am able to fully take advantage of what the platform has to offer.	1	2	3	4	5
16. I believe that the platform can become an indispensable learning tool in my classes.	1	2	3	4	5
17. How likely is it that you would recommend this platform to a colleague?	1 Never	2 Unlikely	3 Neutral	4 Likely	5 Definitely

(C) General Feedback and Suggestions (open-ended questions)	
1. What do you like most about the platform? *(these are the aspects of the platform we should definitely keep)*	
2. What do you dislike about the platform? *(these are the aspects of the platform we should remove or improve)*	

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3. What is missing from the platform? *(these are the aspects of the platform we should definitely add to support you in your teaching)*	
4. Any other ideas or suggestions you would like to share for improving your students learning experiences?	

Thank you for your invaluable feedback and participation.

If you require further information about the INCLUDEME platform you can contact us at: *<provide email/contact information for the partner conducting the pilot>*

The INCLUDEME official website also includes further information and can be accessed at:

https://includeme-project.eu/

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12. Appendix F – Reporting Matrix

Please keep a record of all communications and contact attempts with any individual, group or organisation relevant to the eight (8) INCLUDEME Target Groups.

In turn, following contact with Target Group representatives fill in the following Reporting Matrix (use 1 sheet per interview/focus group).

Reporting Matrix Template (1 sheet per interview/focus group/pilot)

INCLUDEME Partner Id: ATS – HFC – BIBA – UTH – PAC – SWU – AAP	Date/Time of contact: Communication medium (e.g., online, f2f): Duration of discussion:	Target Group id: DTG1 – DTG2 – DTG3 – ITG1 – ITG2 – ITG3 – ITG4 – ITG5
Number of participants in the meeting:	**Details on the role(s) of individual/group being contacted (e.g., job title, organisation/authority/department, etc.):**	**Research method employed (e.g., informal conversation, semi-structured interview, focus group, etc.):**
Project Brief covered? [YES] / [NO]	**Informed Consent Form signed?** [YES] / [NO] / [N/A]	**Other documentation used (e.g., adjusted agenda):** [provide links to shared documents]
1. Demographic information & notes/findings/insights on Economic, social, and cultural context	• • •	
2. Notes/findings/insights on Accessibility & Inclusivity in Education	• •	
3. Notes/findings/insights on Educational needs and Educational Technologies	• •	
4. Notes/findings/insights on Use of games in education	• •	
Other comments/insights that can inform INCLUDEME platform design & development	• •	
Follow-up actions agreed with the participant:	**Agreed to participate in (further) Pilots?** [YES] / [NO] / [N/A] **Details/constraints/comments/recommendations:**	**Agreed to be further contacted & participate in INCLUDEME activities?** [YES] / [NO] / [N/A] **Details/constraints/comments/recommendations:**

13. Appendix G – WP2 Transnational Meeting Agenda

WP2 Meeting Agenda

SKYPE Meeting Link: https://join.skype.com/DjxMXIA00BPi

Thursday 25th November 2021, 13:30-14:30 (EET)

Hosts: PAC

Participants: All partners invited

MEETING AGENDA

- Objective (1): selection of target groups
  - o Action 1.1: Agree on the TGs we will be focusing on.

- Objective (2): **piloting guidelines & programme** (RESULT R2.1) for each target group
  - o Action 2.1: Agree on the methods each Partner will use in running a Pilot with a TG.
  - o Action 2.2: Review the suggested Interview/Focus group Agenda and Survey/Questionnaire.

- Objective (3): Finalise the **pilot plan** that will support piloting activities
  - o Action 3: Ensure the Plan is viable and flexible from all points of view (for each partner, TG, etc).

- Objective (4): KPIs/effective metrics for evaluating the performance of the piloting programme.
  - o Action 4: Finalise the list of KPIs.

- Data gathering (for research/publications) and reporting.

- Ethical considerations.

- Wrap-up – Any further actions.

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