PROJECT PLANNING AND DESIGNING

TOOLKIT ON EUROPEAN PROJECT MANAGEMENT FOR THE CIVIL SOCIETY ORGANIZATIONS ACTIVE IN THE LIFELONG LEARNING SECTOR, part 1



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PROJECT PLANNING AND DESIGNING

Toolkit on European Project Management for the Civil Society Organizations active in the Lifelong Learning Sector, part 1

Co-editors: Agnieszka Dadak, Lorenza Lupini, Luca Bordoni, Marianna Labbancz, Carmen Malya, Jéssica Magalhães, Ingibjörg Benediktsdóttir, Hilmar Gunnarson

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Toolkit developed in the frames of the project "EUropean NETworking as a method for further training and exchange of ideas in the lifelong learning sector", co-funded by the European Union.

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DEAR COLLEAGUE!

THANK YOU FOR CHOOSING THIS TOOLKIT. IT IS GREAT YOU GOT INTERESTED IN EUROPEAN LEVEL NETWORKING AND COOPERATION.

AS THE 12 MAIN CO-AUTHORS OF THIS TOOLKIT, WE HAVE, ALL TOGETHER, AROUND 77 YEARS OF EXPERIENCE IN EUROPEAN PROJECT MANAGEMENT AND 122 YEARS OF EXPERIENCE IN WORKING IN THE THIRD SECTOR, THE CIVIL SOCIETY ORGANISATIONS (CSO). THEREFORE WE KNOW, FROM EXPERIENCE, THAT WELL PLANNED AND DESIGNED EUROPEAN PROJECTS REALISED BY CIVIL SOCIETY ORGANISATIONS MAY BRING A REAL CHANGE: SOLVE CRITICAL SOCIAL ISSUES, SUPPORT THE PERSON'S MOST NEEDING SUPPORT, DELIVER INNOVATIVE SOLUTIONS, RESOLVE CONFLICTS, BUILD BRIDGES BETWEEN THE PEOPLE AND THE SOCIETIES, BUILD UP COMPETENCES, AWARENESS, AND MANY MORE. IT IS WORTH DOING. IT IS WORTH PREPARING WELL TO WORK IN THIS FIELD. WE DO HOPE THIS TOOLKIT WILL SUPPORT YOU AT THE EUROPEAN PROJECT PLANNING AND DESIGNING STAGE.

WE KEEP OUR FINGERS CROSSED FOR THE SUCCESSFUL REALISATION OF YOUR PROJECT IDEAS!

Write a title here









WHY HAVE WE DEVELOPED THIS TOOLKIT - AND FOR WHOM?

The aim of this Toolkit is to support the beginners in the field of European project management and all the persons/organisations willing to cooperate and network on the European level.

This Toolkit is primarily dedicated to the members, workers, co-workers, volunteers, and the adult learners of the Civil Society Organisations (CSOs) including informal groups, nongovernmental organisations and other non-profit and not for profit organisations. We believe it may be also useful for any public and/or private organisation; in general - a wide range of education – related organisations, institutions, and decision makers.

The Toolkit addresses the need for more practical examples, more case studies, material for further self-directed learning in the field of European projects initiation, designing, developing and realising.

The Toolkit was designed as a practical and reusable resource for the practitioners in the field of European project management.

The Toolkit is divided into two parts:

- 1. **Part 1**, you are reading now, is related to project planning and designing. The aim of the first part of the Toolkit is to guide you from a project idea to a successful proposal.
- 2. **Part 2**, related to project coordinating, monitoring and evaluating, is aimed to support the successful implementation of the European projects that have been co-funded by the European Union.



The Context

This Toolkit was developed by the practitioners in European project management, working for the civil society organisations in five European countries: Poland, Italy, Hungary, Portugal and Iceland, within the 28-months long European project entitled "**EU**ropean **NET**working as a method for further training and exchange of ideas in the lifelong learning sector" [**EU NET**].

The main aim of the project is to support the European level networking of the civil society organisations active in the lifelong learning sector. One of the means of this support is this self-learning material.

The project is being realised by <u>five</u> civil society organisations from five European countries:

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| Folk High School Association Surrounding Budapest | | http://www.bknsz.hu/ | |
| Rightchallenge - Associação | Portugal | https://rightchallenge.org/en/ | |
| Húsavík Academic Center | Iceland | https://hac.is/english/ | |





The Context





All the editors of this Toolkit are practicians in the field of European project management.

All the organisations involved in this Toolkit development are the members of the FIRST Network.

The EU NET continues and builds on the conclusions from the two preceding projects:

- The "First-time international projects realisers support network", realized in the period 2018 2022
- The "Recommendations for international project managers competences recognition and validation for lifelong learning", realized in the period 2019 2022.

Those projects were co-financed within the Erasmus+ Programme of the European Union. The EU NET project realisation was co-funded by the European Union.



The Context





European cooperation: benefits for the civil society organisations

Why is it worth to cooperate on the European level?

The civil society organisations (CSOs) cooperating at the European level mention, among others, the following benefits:

- Learning new organisational and technical solutions;
- Mastering the methodology of work;
- Approaching the problems, methods, solutions, from a different perspective;
- Exchange of good practices; including the professional staff and volunteers into international cooperation;
- Transfer of the effective solutions, practices, products and results between the partners;
- Getting inspiration and ideas for future activities;
- The access to and the opportunity to use the ready solutions and "good practices" developed by the project partners in the own country/organisation;
- The opportunity to test and disseminate own solutions, products, and results;

- Building new international contacts and relations that can be used in the future, resulting in adapting new products and solutions, as well as for widening the offer for the clients/beneficiaries of the organisation;
- Widening the audience/client's groups of the organisation and its activities;
- The opportunity to verify the competences, potential and activities during the cooperation with the international partners;
- The opportunity to promote the organisation, the city/region/the country on the European level;
- The opportunity to widen the access to the possible co-funding sources for realising the organisations' mission, goals, and strategies.

Last but not least, European cooperation brings European added value – a unique value that could not be developed by just one organization in just one country.







Since project management methodologies are many, there were some assumptions made for this Toolkit:

The understanding of a "project"

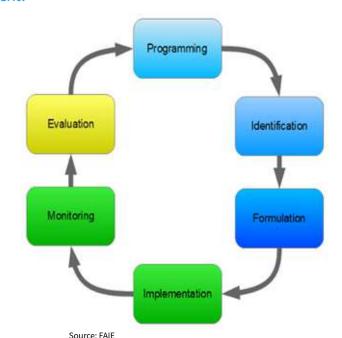
Instead of a definition, we propose to characterise "a project" by several traits.

A "project" is...

- 1. Goal oriented.
- 2. Composed of interrelated activities that need to be coordinated.
- 3. Temporary and timely defined it has a start-date and an end-date.
- 4. Having assigned specific resources for its implementation (human, financial. etc.)
- 5. Unique and unrepeatable.
- 6. Delivering unique product/service/result.
- 7. Including elements of uncertainty and risk.
- 8. Gradually attaining the products/results.

The project cycle management methodology

We propose to work with projects on the basis of the project cycle management methodology as fitted for the CSO context:









In the **programming phase**, the organisation plans the project, taking into account:

- What is the present situation in the environment the organisation is working in?
 What is the present situation of the people the organization is working for (the clients/beneficiaries) and the other stakeholders; what are the needs/challenges?
- What/which social, economic, political, etc. conditions are relevant for the project idea realisation?
- Is the project idea relevant for the specific cofunding programme?

In the **identification phase**, the project idea is being specified, answering the questions:

- What are the specific needs of the stakeholders the clients of the organization?
- What are the causes and effects of the identified needs/problems?
- What possibilities to address the needs/problems/challenges the organization has – what aims, and goals would be realistic to achieve?



The Context





In the **formulation phase**, the project implementation strategy is planned in detail. Here, the project concept is transformed into the action plan, including answers to all the questions described in the next chapter. The **final effect** of this phase is the ready project application answering the specific call for proposals. These **three phases** are relevant for the project planning and designing stage.





If the project gets co-funded, the **implementation phase** begins, including the transversal **monitoring** and **evaluation** processes.

To learn more about the European project implementation, please go to the Toolkit, part 2, coordinating, monitoring, and evaluating the project.







The project logic step-by-step

We propose you to imagine the process of working on the project design as an orderly path made of several questions. Answering the following questions, in the following order, one by one, would lead you through the whole of the process:

- 1. Why this project needs to be realised?
- 2. What goals will the project realise? What tasks need to be realised to achieve the goals?
- 3. How long would it take (what will be the project's time schedule)?
- 4. How much will it cost (what is the project budget)?
- 5. Who are the project's stakeholders?
- 6. Who should be involved in the project realisation (who is the project team)?
- 7. How to gain a project partner and how to check if the cooperation will be going well? What is the potential of the project leader (and the partnership) to realise the project?

- 8. What will be the project outcomes and results?
- 9. What could affect the project's outcomes (what are the risks)?
- 10. How will the project be communicated and promoted?
- 11. How will the project outcomes be disseminated (and mainstreamed)?
 - ♣
- 12. How will be proved the project was a success (how will be the project be monitored and evaluated)?
 - 个
- 13. How is the project in line with the chosen grant programme aims and the overall European policies?

Planning and designing an European project, it is recommended to plan it all together with your project partners.









Last but not least, here are some final, general advice for the project planning and designing stage:

- A project is a method of work. A cycle of interrelated stages: Programming => Identification => Formulation => Implementation => Monitoring => Evaluation => ...
- A project should be in line with the organisational development strategy, in line with its' mission and values. The mission => the aims => the strategy => the project => the grant application. The most valuable projects are the ones which introduce sustainable change in the environment.
- A project is not a (grant) application.
- Project = method of work. Project application = an offer submitted to a "sponsor". It is a tool for gaining funds and other means for project activities realisation.





Unit 1

HOW TO DEFINE THE PROJECT IDEA?

By Ingibjörg Benediktsdóttir and Hilmar Valur Gunnarsson, Husavik Academic Center



Unit 1











Estimated time for studying this chapter and doing the practical activity: **2 hour**

Learning Objectives

After studying this chapter, you shall be able to:

- Set long, medium, and short-term goals.
- Define priorities and form action plans.
- Follow-up and adapt to unforeseen changes.
- Be aware of what to consider when writing a project application.











At the end of this chapter, you will be able to **set goals** and **develop ideas**. Goal setting is about realizing where we are going and planning for how to get there.

The study material provides advice on successful goal setting.

The process of ideation will be introduced with **some examples** of methods that can be useful when it comes to **analysing opportunities**, **organising thoughts**, and **developing ideas**.

Methods to identify **obstacles and tools** to deal with challenges that may arise will be presented.

You will increase your confidence in designing a good project and writing a good project proposal, the prerequisite to become a successful project designer.















The plan, which marks the path to the goal, should include as much incentive as possible, for example with well-defined work components or micro-objectives. The pleasure of completing each part gives motivation. Goal setting is about setting goals and planning about how to reach them.



Goal setting can assist in realising your vision and will affect achievement.

- A goal needs to be defined.
- A goal should be clear, distinct, realistic, and measurable.
- Focus on the goal and keep the focus.
- Make a strategy based on the goal and plan for achieving the goal.







How are you doing in the present by doing a mission statement?

"A formal summary of the aims and values of a company, organization, or individual."

A mission statement is in general short, typically just one sentence or a short paragraph. The statement makes the purpose of the project clear to people both inside and outside the company. It describes what your company/institution does.





Unit 1





Look towards the future by doing a vision statement!

"An aspirational description of what an organization would like to accomplish in the mid- or long-term future. It is intended to serve as a clear guide for choosing current and future courses of action."

A **vision** statement can be a short sentence or a longer paragraph.

The purpose of a vision statement is to make goals and objectives clearer.

The statement brings a strategic direction for a company or a project.

Vision statement explains what the company/institution attempts to achieve in the future.











The method provides five words that should characterise every goal. According to the method, a goal should be:



Unit 1 Goal setting – examples of methods



One word: The goal itself





Locke and Latham's five principles of goal setting.

These principles concern *clarity, challenge, commitment, complexity, and feedback.*





Backward goal setting



















Soft skills:

Skills are not to be seen as a fixed or unchangeable factors in individuals, on the contrary, they evolve, develop and change.









Have a clear concept. Writing a proposal can be intimidating. There are multiple steps involved.

Ideation is a process that involves getting ideas, working on them, shaping, and developing them. The process is also about looking at ideas and trying to view at them from different perspectives. Attempts are made to examine all aspects of the case, including those that at first seem unpredictable.

You can start with no idea, many ideas or even ideas that have already been implemented. Ideas can be developed in various ways. Methods of idea development have been formed and tested in diverse situations and can apply differently to projects and individuals.

It can be effective to combine methods to develop ideas!







Some examples of methods:



The star:

Draw a star with six angles.

Write the idea you are working on in the centre of the star.

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Scenarios:

Looking towards the future will always include a great deal of uncertainty.

Scenarios can be drawn to shed a light on a possible situation in the future.



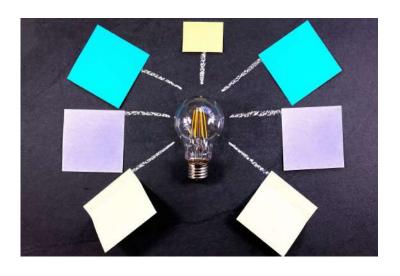


Some examples of methods:



Mind Map

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Brainstorming:
A method to evoke ideas.

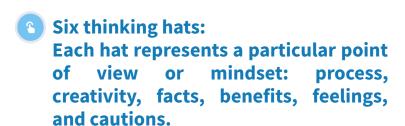












Plan B Plan C Plan C

Adapt to unforeseen changes:

Don't get into the habit of making changes every day, but don't be afraid to step in and extend a deadline or re-prioritize tasks if you need to



Overcoming Challenges:
Ask yourself some questions.

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Evaluation of the project idea and opportunity assessment

In this chapter you will be introduced to few methods of assessment.

You will be able to find and evaluate possibilities and opportunities. This is a strategy used to determine the success and impact of the project.

Performing a market opportunity assessment can be beneficial for all types of businesses and organizations. This method can be carried out in different ways and various guidelines are to be found. The main purpose of the assessment is to examine some key factors in the project, for example by doing a thorough research on students, customers, competition, the business/organisation environment factors, and the market in general.

A market opportunity assessment may involve the application of other methods. Implementing a **PESTLE or SWOT analysis** can thus be a part of a detailed market opportunity assessment.









Evaluation of the project idea and opportunity assessment

PESTLE Analysis:



A strategic framework to analyse six aspects of the external environment of companies or institutions.



SWOT Analysis:



SWOT is an example of strategic planning techniques







Evaluation of the project idea and opportunity assessment

Stronger Together



A very usual advice about identifying opportunities relates to the value of cooperation and communication



Ansoff Matrix Analysis:



The Ansoff Matrix is one of the most common market planning tools for analyse and plan for growth.





Need statement, expected outcomes, timeline, and budget

Is your project in line with recent developments and trends?

Most application have a standard set of sections that you need to complete.

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Your proposal must meet the eligibility criteria defined in the call for proposals.

You can check the requirements for each action in the grant programme instructions (i.e. 'guidelines for beneficiaries') or in your national office/European office (i.e. the grant operator for a specific grant).

Each call proposal has its **own criteria** and steps to follow

Read about other projects realised before within the financing you are interested in, and get inspired (for ex. there are usually some publications available, with a collection of the most interesting projects realised within the specific grant, available at the webpages of the grant operators).

O5 Talk to others that have already done some projects

Read the objectives in the program guidelines







Why this project needs to be realised?
The importance of starting from the need/challenge.

However tricky it might sound for you, the European public funds are not meant to finance goals and activities. They are meant to address needs, solve problems, overcome challenges – changing the realities of certain persons/groups/environments for better.

Before you set the goals for your project, remember to clearly name the problems(s)/needs/challenges your project would respond to.

The need/challenge/problem need to be: present, real and harmful to certain target group(s).

You would need to understand, and present in the project application, the causes and effects of the needs/challenges/problems you name. Only when it is done, you shall start setting the goals. Have a look at the programming phase and identification phase questions, mentioned in the introduction, for some specific questions to answer.







Have you chosen the right time to launch your project?

As mentioned above, your project must be addressing a real challenge, linked to the work of the organisation you represent. If the challenge is real, present and 'harmful' – and your proposal to address this challenge fits with some currently open call for proposals, it is the right time to start planning your project.

The application process takes time. It is recommended to get familiar with the requirements of the action you want to apply for and make sure you have everything provided in time.

Do not underestimate the time it takes to collect all information needed.







What information and actions you need?

- Be specific and realistic. To write specific objectives for your project, use numbers and other specific words to describe them.
- You also have to make them time-bound, set up sub targets, i.e. short and mediumterm goals to achieve on your way to your long-term goal.
- Make objectives realistic so that your project has a good chance of achieving them.
 Have the material measurable, avoid words like "more", use instead specific numbers.







Be Relevant

Describe

Explain

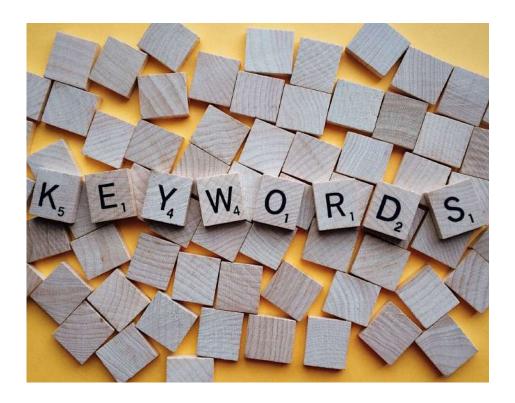






The quality of the project design and implementation. This involves activities to evaluate whether the product meets quality requirements that are specified in the application.

Objectives and expected impact are one of the most important things that has to be clear in your application. This is a section you need to explain and describe the expected changes within your community if the proposal were to be funded and implemented. Words used to describe these objectives could include goals, objective, outcomes, and impact.









Link your ideas to the priorities of the call - explain how your project idea matches the objectives and priorities of the funding program. The description of your project is the heart of your proposal. Here you describe what you will do to address the community need that you've identified and how you will achieve expected outcomes within your timeline and budget.

This is our action plan.

Say exactly what your proposal is, what funding is needed and how it will be used.









Is the project relevant?

You must address that your project is different to previous ones. The value that the project brings must be clear and must apply for other countries or organisations. Support your process with research such as best practices, experts' opinions, past experiences, etc.

Ask yourself some questions:

- Does the partnership make sense for all involved?
- What does each partner bring to the table?
- Does each partner have a clear role?
- How does collaborating save time and/or resources?
 How does it increase the outcome?







How to avoid mistakes

- Follow the funders instructions.
- Carefully calculate your budget request. Make it add up and double-check it.
- Make sure you explain how your organization is represented and the impact the project can have on the community.
- Be willing to change the project based on your conclusions in the assessment.
- Make a check list.









There is a lot to consider, it is important from the start to keep a close eye on all the paperwork and data to facilitate the work during the project and when it is time to submit a

The European, national or local grant programmes office's staff are there to help and have assisted project managers at any time during a project to solve any problems that may arise in the management of projects.

In this chapter you will be introduced, as the example, to the support for project designers/project realisers available within

Erasmus+ programguide (2020-2027)

final report.

The handbook

Usually, each grant program has a handbook or a guide.

These handbooks describe, among others, who can apply, what you can apply for and how does the application process look like.

Usually there is a program office or a national office representing the grant programme. There you can contact experts about any question you might have.

Your application will be evaluated based on the **criteria** described in the programme guide.

The key actions are different for each program, and it varies from the difference of them.

- One of the most important goals is to convince the evaluators that your project is actually needed.
- On the European Commission's website you can find the most current Erasmus+ Programme Guide. You can also contact the staff of the Erasmus+ National Office in your country for more information on the conditions that applicants must meet in order to apply for grants from Erasmus+. You will find the relevant office, in your country.
- The Erasmus+ Programme Guide is essential to understanding Erasmus+. It provides participating organisations and individuals a comprehensive list of opportunities supported by the programme. It is important to check your application against the programme guide.
- The Programme Guide is currently available in 23 languages. It is worth to be aware the Guide is being updated every year – so make sure you have the latest version.









Guidance/seminars

The **National** Erasmus+ Offices usually hold infosessions and workshops, both for the project designers project and managers, to support them at designing, starting and implementing/reporting the project work. Usually, for the exemplary Erasmus+ programme:

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Before the call for proposals is opened, there is an informationsession announced for the persons interested in designing a project to be submitted within the programme – or just the ones considering this opportunity, explaining what will be the call for proposals about.

There may be some more specific workshops offered, with more specific topics, for those who have decided to design the project (for ex. how to find the project partners, or how to plan the project evaluation).

For the organisations that submitted successful project proposals, chosen for co-funding, there would be probably some kick-off info-session organised, to explain the essentials of the project implementation, management and reporting from the point of view of the grant operator.

There may be also some intermediary info-sessions organised, for the organisations 'in the middle' of the project implementation; for ex. one year after closing the specific call for proposals.





Information about these courses is sent to the project manager and advertised on the Erasmus+ national offices websites.





How to create an original application





Erasmus+ project results platform is for presenting details and outcomes of recent and ongoing projects. You can use this platform to get inspired for your project and/or find out if you have an original project idea.

Filters for the search, actions, types:

When you search for a project, you need to decide on what kind of projects you are looking for. First of all, you choose the same action as you are applying for. After you decide on your key words you can search for that in other projects.





How to create an original application





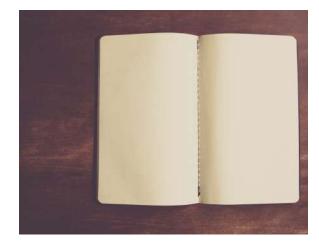


The name of the project

The project name matters.

The name has power, and it indicates the tone and intent.

You will use the name for websites and the project acronym will be used in daily talk. It can be a challenge to choose the perfect and appropriate name.



Defining the name:

The project goals in a statement are the most straight forward title.

The title must be understood and appeal to everyone. Everyone must know what the project is about.

Here are some tips:

- 1. Write down the key words which summarise your project.
- 2. You may do it during a brainstorming session with the key persons involved in the project design.
- 3. Make a list with three suitable names and have discussions about them.
- 4. Take notes from the discussion and then you should be able to choose the best name.
- 5. Don't over think it.
- 6. Don't choose a name that is hard to pronounce in any language where the project might operate. If it is hard to pronounce, then people will avoid talking about it. Likewise, avoid hard-to-spell names.
- 7. Test your name idea with others. Could it have a tongue twister, can other say it. Look at the list of other projects to make sure your name has not been used before, in similar projects.











Don't overthink this part.

Tough, you could get into trouble if you don't know what the letters stand for.

Let them spell out something appropriate.

Here are some examples for help material.













- 1. I know more ways of setting goals and develop ideas.
- 2. I know several methods to analyse opportunities and organising my thoughts.
- 3. I know several methods to identify obstacles and tools to deal with challenges that may arise.
- 4. I have increased my confidence to write a good project proposal and become a successful grant writer.

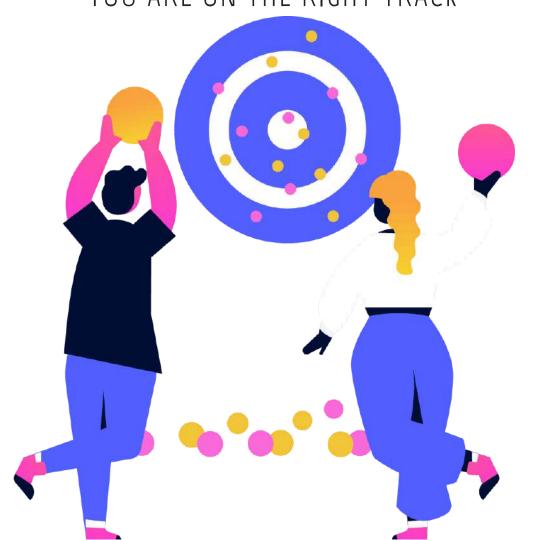
Yes No No

Yes No

Yes No No

Yes No No

AMAZING YOU ARE ON THE RIGHT TRACK









One – page project summary

(Baltic Network for Adult Learning)



| Working title | |
|---|--|
| Background | |
| Target group | |
| Aim | |
| Deliverables | |
| Main phases of work | |
| Assumed partnership and roles of the partners | |
| Approximate duration | |
| Rough budget | |
| Evaluation methods and criteria | |



HOW TO FIND AND CHOSE THE PROPER EU GRANT PROGRAMME TO REALISE MY PROJECT IDEA?

By Jéssica Magalhães, Rightchallenge – Associação and Agnieszka Dadak, Fundacja Alternatywnych Inicjatyw Edukacyjnych







How to find and chose the proper EU grant programme to realise my project idea?





The <u>challenge</u> addressed by this chapter: Understanding how to use European funding for realising the represented organisation mission/goals.



Estimated time for studying this chapter and doing the practical activity: 2 hours to read and study the chapter. Half an hour to do the activities.

Learning Objectives

After studying this chapter, you shall be able to:

- Understand the basis of financial planning of European Projects;
- Demonstrate a general overview about the type of funding available for European Projects;
- Demonstrate a basic knowledge of the financial vocabulary used in the EU funding programmes;
- Know how to search for funding for the projects in the EU.









Around 80% of funding for Civil Society Organisations (CSOs) including NGOs in the EU are managed by the European Union countries themselves. On their websites, the grant operators (National Agencies, Information Desks, etc) in each country provide detailed information about the specific funding and the application process. The rest of the funding is managed by the European Commission (centrally from Brussels) or other EU bodies.

All the European Grant programmes have an official page of reference. There you will find the basic, relevant information about each programme as well as links for the official websites of the various grant programmes.

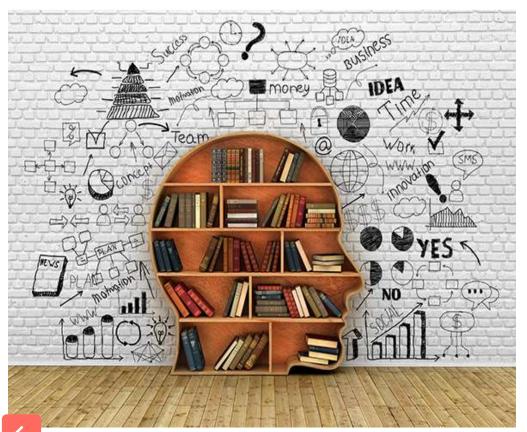
For the purpose of this toolkit, in order to give you some specific examples, we chose one of the European Union's grant programmes: Erasmus+ programme.

The examples mentioned below are relate to the Erasmus+ Programme.









CSOs working in the fields of social inclusion, gender equality and equal opportunities can benefit from the support from the European Social Fund Plus (ESF+). The funds provided are managed by authorities in the EU countries or regions.

The **Creative Europe programme** supports initiatives related to Europe's audio-visual, cultural, and creative sectors. The programme consists of two sub-programmes: Culture and Media. Through the Creative Europe Programme, which executive agency is the **EACEA**, you can find funding for culture and media.

Funding opportunities under the Culture sub-programme cover a wide range of possibilities, from collaborative projects to literary translation and support for networks and platforms. On the other hand, the MEDIA sub-programme provides financial support to help the EU film and audio-visual sector develop, distribute, and promote its productions, as well as funding actions and training programmes that benefit the film industry.



Where can an organisations look for funding opportunities?





Promotion of citizenship and civic participation is available through the Citizenship, Equality, Rights and Values (CERV) Programme. The programme aims to protect and promote the rights and values of the European Union as enshrined in the EU Treaties and in the Charter of Fundamental Rights.

The intention is the projects realised within CERV would contribute to maintaining and developing open, rights-based, democratic, egalitarian, and inclusive societies based on the rule of law.



Development and humanitarian CSOs can apply for projects under the **Horizon Europe**, the EU's main research funding programme, which supports research projects in various fields carried out by organisations or individuals.

CSOs can receive funding under most regional or thematic programmes managed by the European Commission's Directorate-General for International Partnerships (INTPA). CSOs can also receive funding for humanitarian aid and civil protection activities through the Commission's Directorate-General for **Civil Protection and European Humanitarian Aid Operations (ECHO).**



+ INFO

+ INFO





Where can an organisations look for funding opportunities?

Some funding areas of the **Connecting Europe Facility (CEF) programme**, which funds projects related to energy, transport, and ICT, are open also to CSOs.

The CEF strands are managed by the Climate, Infrastructure and Environment Executive Agency (CINEA) and the Health and Digital Executive Agency (HaDEA).



The External **Policy Instruments Service (FPI)** regularly publishes calls for proposals and calls for tenders.

Grants are available under the **LIFE programme** for a number of projects. Any public or private legal entity registered in the EU can submit a proposal.



+ INFO





There are many more **grant opportunities** on the **European level**. If you are unsure where to begin, or if you are looking for a very specific grant opportunity, we recommend you try some grant search tools. There, you can introduce some basic information about the funding you are looking for (for examples, the industry you work in) and search using various filters (for example, an age group, a specific topic, a country, etc).



+ INFO









Why funding opportunities are important?

Funding opportunities are important tools for CSOs operating in Europe. They help to support campaigns and events, educate people, and create safe spaces for discussion. The funding can also be used to strengthen the relationship with other CSOs such as network, collaboration, and meetups.

(Find more information about partnership on chapter 3).

Funding opportunities can be seen as a powerful vehicle for raising awareness among the public at large of issues of concern to civil society and to young people. They can also assist in the development of research and/or activities that have wider impact by encouraging collective discussions, cross-border action and dialogue, research collaboration, etc.

Engaging with European Union's funding opportunity is a key to developing your CSO impact and visibility.

You can apply and participate in research projects, attend workshops, network with like-minded organisations, and receive funding for activity costs.

In today's world, international funding opportunities are vital for CSOs that want to fulfil their mission. The European funds offer a way to gain access to a larger audience and attract membership funds.

This is a perfect opportunity to influence the EU institutions and national interest groups on key issues and share good practise from civil society, youth organisations and others that are fighting for a better world.









Erasmus+ grant is an opportunity for any organisation/institution/company working in the field of, widely understood, education and training.

Erasmus+, the European programme to promote mobility and education. Have a look at the Programme Guide to check how to apply for Erasmus+ funding and to find out what types of project may be funded.





The rules for the Erasmus+ programme are published in the Erasmus+ program guide, which is available in all the languages of the eligible partner countries. The European Commission sets out the rules and guidelines that anyone wishing to be part of an EU-funded project must comply with. All applicants must follow these rules, which can differ from grant program to grant program.









The EU has a wide range of **grant programmes** available.

Usually, a specific grant programme is further sub-divided, into several so called 'key actions'/ 'funding lines'.

It is really important to choose the **right funding action** or line in your application as they can make all the difference.

You will find some tips on how to choose your most suitable funding action in the '**programme guide**' for the specific grant programme. You may also call the relevant National Agency/Info Desk of the specific grant programme, to learn more.

The different funding lines/actions may **differ in size and range** of eligible applicants.

For the exemplary Erasmus+ Programme, the division of the grant-lines is made, firstly, along the 'sectors' of education and secondly, along so called "key actions".

The sectors of education, covered by the programme, are: **School education** (formal education), **vocational education** (formal education), **higher education** (formal education), **adult education** (related to non-formal and informal education), the **youth education** (non-formal and informal education), **sport** and the **Jean Monnet** scheme.

The "key actions" (KA), common to all the sectors (apart from Jean Monnet scheme), define the kind of activities that may be co-financed under each KA.







Key action 1: cofinances the learning mobilities for individuals

Here, after making a 'development plan' describing the educational needs and challenges, an educational entity may get cofinancing for their staff (and sometimes also the learners) learning in the other EU countries. The forms of the learning are, among others: Job-shadowing, participation in courses and trainings.

Key action 2: cofinances cooperation among organisations and institutions.

Here, the development work realised by international partnerships of organisations and institutions can be co-financed.

These are projects aimed at supporting the development, transfer and/or implementation of innovative practices as well as the implementation of joint initiatives promoting cooperation, peer learning and exchanges of experience at European level.

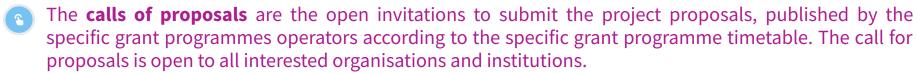
Key action 3: cofinances support to policy development and cooperation.

There are also so called central actions available for the sectors: higher education, vocational education and adult education.





Call for Proposals



The purpose of the call for proposals is to identify those areas which cannot be adequately addressed by national or regional authorities alone, or which lie beyond their own competences, whether national or regional.

The main objective of the call is to support organisations wishing to implement activities realising the aims of a grant programme.

Before applying, you need to check if your project idea/scope of the project fits into the criteria outlined in the specific call for proposals. Each funding programme and each call for proposals lays down specific criteria that you need to meet to be eligible for funding. The criteria may relate to the type of entities and activities eligible for funding, the co-funding rate and the maximum budget, eligible countries, etc.

All those information is clearly defined in the call for proposals document () and relevant appendices which should be read carefully to be sure your project idea/scope fits into these criteria.

The selection criteria are public and are being presented in the programme guide or other relevant call for proposals related document. Read them carefully and have in mind while designing your project.







In the exemplary, **Erasmus+ Programme**, at the **call of proposals** stage, for the **Key Action 2**, you would need to decide on the planned value of the project you would like to realise.

The currently proposed funding model is divided into two types of projects eligible for funding:



Small-scale partnerships, where you choose between the value of possible co-funding of **EUR 30 000 and EUR 60 000** (this line is especially dedicated to the beginners in the field of European cooperation, it is enough to have just 1 project partner).





Cooperation partnerships, where three single lump sums, corresponding to the total grant amount for the project offered are: **EUR 120 000, EUR 250 000, and EUR 400 000.**







Call for proposals – Examples







Applicants choose the type of the project and one of the two or three predefined amounts, according to the activities they intend to carry out and the results they want to achieve during and after the implementation period of the project.

The applicant organisations, together with the other partners, when planning projects need to choose the most appropriate **single lump sum** to cover costs. These costs should be based on the needs and objectives of the respective project. If the project is selected for funding, the requested single lump sum becomes the maximum grant.

The **proposals** must describe the activities that the applicants undertake to carry out with the requested lump sum and must comply with the principles of economy, efficiency, and effectiveness.



<u>In case of some doubt about which lump sum to choose, the</u> applicants may:

- **1.** Reduce the cost of their project, e.g. find more cost-effective ways to achieve similar results or adapt the number of project activities.
- **2.** Increase the scale of their project, e.g. include more participants in activities, increase the number of activities or create more results for the project.

The choice of the single lump sum requested must be based on the applicant's own estimate of the overall cost of the project. Taking this estimate as a starting point, applicants should choose the single lump sum that is the most appropriate for their needs, while ensuring an efficient use of funds and always respecting the co-financing principle (i.e. the project budgets are expected to be complemented by other sources of financing; the envisaged global cost of the project must be higher than the requested single lump sum).









Check the project proposals evaluation rules

- 1. First, it is worth to check the proposals (project application) evaluation criteria, set for the chosen call for proposals.
 - 2. You will find this information in the 'beneficiary guide' or other attachments to the call of proposals.
 - **3.** Usually, the project applications answering a call of proposals, are evaluated by **external evaluators**, who give scores according to various characteristics that the contents of the application must have.
 - **4.** In general, a project, to be approved for co-funding, need to **score minimum 60 points** (of the max. 100 points possible to get).
 - 5. What is more, each evaluation criterium has to get more than half of the maximum section score (for example min. 16 points out of the 30 possible for the 'quality' criterium).
 - **6.** If the application does not reach 60 points, the project won't be cofinanced.



Unit 2 ERASMUS+ Small-scale Partnerships (KA2)

Exemplary award criteria

Relevance of the project

Maximum score 30 points

Quality of the project design and implementation

Maximum score **30** points

Quality of the partnership and the cooperation arrangements

Maximum score 20 points

Impact

Maximum score **20** points



Exemplary award criteria

Relevance of the project

Maximum score **25** points

Quality of the project design and implementation d

Maximum score **30** points

Quality of the partnership and the cooperation arrangements

Maximum score 20 points

Impact

Maximum score 25 points







Check the procedure related to the submission of the project proposal

To submit an Erasmus+ project, the applicants must follow the four steps indicated below:

1. First you have to register

2. Check the program criteria for the action / sector in question

3. Check financial conditions

4. Complete and submit the application form.



NOTE:

In the case of actions managed by the executive agency, applicants, affiliated entities, and associated partners must register on the funding opportunities and competitions portal (FTOP) and receive a participant identification code (PIC). Organisations that already have a PIC for their participation in other EU programmes do not need to register again. The PIC obtained from that previous registration is also valid for applications under the Erasmus+ Programme.



In the case of actions managed by **national agencies**, if they have not already done so, applicants must register through the organization registration system for the Erasmus + Programme and the European Solidarity Corps and receive an organisation ID.





Evaluation and Punctuation of the calls for proposals – cooperation

partnership





The proposal is relevant for objectives and priorities of the Action. In addition the proposal will be considered as highly relevant if:

- It addresses the priority "inclusion and diversity"
- In case of projects managed by the Erasmus+ National Agencies: if it addresses one or more "European Priorities in the national context", as announced by the National Agency
- In case of projects submitted by ENGOs in the fields of education, training, and youth to the European Education and Culture Executive Agency: the extent to which the applicant runs activities that support the implementation of EU policies in one of these sectors.

(Maximum score 25 points)

- The profile, experience and activities of the participating organisations are relevant for the field of the application
- The proposal is based on a genuine and adequate needs analysis
- Relevance The proposal is suitable for creating synergies between different fields of education, training, youth and sport or it has potentially a strong impact on one or more of those fields
 - The proposal is innovative
 - The proposal is complementary to other initiatives already carried by the participating organisations
 - The proposal brings added value at EU level through results that would not be attained by activities carried out in a single country.





Evaluation and Punctuation of the calls for proposals - cooperation

partnership

The project objectives are:

- clearly defined,
- realistic and
- address needs and
- of goals the participating organisations and
- the needs of their target groups

The proposed methodology is clear, adequate and feasible:

Quality of the project design and implementation

(maximum score 30 points)

partner organisations.













Evaluation and Punctuation of the calls for proposals – cooperation partnership

Quality of the partnership

The project involves an appropriate mix of participating organisations in terms of profile, including grassroots organisations, past experience in the Programme and expertise to successfully complete all project objectives

and the cooperation

The project

involves

newcomers

and less

experienced

organisations

to the Action

arrangements

The proposed allocation of tasks demonstrates the commitment and active contribution of all participating organisations

(maximum score

The proposal includes effective mechanisms for coordination and communication between the participating organisations, as well as with other relevant stakeholders

20 points)

If applicable, the extent to which the involvement of a participating organisation from a third country not associated to the Programme brings an essential added value to the project (if this condition is not fulfilled. the participating organisation from a third country not associated to the Programme will be excluded from the project proposal at assessment stage)







Evaluation and Punctuation of the calls for proposals – cooperation partnership

Impact (maximum score 25 points) The project has the potential to positively impact its participants and participating organisations, as well as their wider communities

The expected project results have the potential to be used outside the organisations participating in the project during and after the project lifetime, and at local, regional, national or European level

The project proposal includes concrete and logical steps to integrate the project results in the regular work of participating organisations;

The project proposal includes concrete and effective steps to make the results of the project known within the participating organisations, to share the results with other organisations and the public, and to publicly acknowledge the European Union funding



The project proposal includes concrete and effective steps to ensure the sustainability of the project, its capacity to continue having an impact and producing results after the **EU** grant has been used up





Evaluation and Punctuation of the calls for proposals - Small-scale





partnership

Relevance of the project (maximum score 30 points) Quality of the project design and implementation (maximum score 30 points)

Quality of the partnership and cooperation arrangements (maximum score 20 points)

Impact (maximum score 20 points)

The extent to which:

- The <u>project</u> proposal is relevant to the objectives and the priorities of the Action. In addition the proposal will be considered as highly relevant if (See _)
- The profile, experience and activities of the participating organisations are relevant for the field of the application;
- The proposal brings added value at EU level by building capacity of organisations to engage in cross-border cooperation and networking.

The extent to which:

- The project objectives are clearly defined, realistic and address the needs and goals of the participating organisations and the needs of their target groups;
- The activities are designed in an accessible and inclusive way and are open to people with fewer opportunities.
- The proposed methodology is clear, adequate and feasible.
- The project incorporates the use of digital tools and learning methods to complement their physical activities, and to improve the cooperation with partner organisations
- The project is designed in an ecofriendly way and incorporates green practices in different project phases

The extent to which:

- The project involves an appropriate mix of participating organisations in terms of profile.
- The project involves newcomers and less experienced organisations to the Action;
- The proposed allocation of tasks demonstrates the commitment and active contribution of all participating organisations;
- The proposal includes effective mechanisms for coordination and communication between the participating organisations;

The extent to which:

- The project proposal includes concrete and logical steps to integrate the project results in the regular work of participating organisation
- The project has the potential to positively impact its participants and participating organisations, as well as the wider community
- The project proposal includes an appropriate way to evaluate the project outcomes
- The project proposal includes concrete and effective steps to make the results of the project known within the participating organisations, to share the results with other organisations and the public, and to publicly acknowledge the European Union funding.









Each of the grant programmes available defines the list of eligible costs/eligible costs categories. There are the costs that can be financed/cofinanced from the grant for the project realisation.

Continuing the example of the Erasmus+ Programme project application, KA2 - Cooperation Partnerships projects:

In this type of projects the eligible costs categories are the following:

- Project Management
- Learning, Teaching and Training Activities
- Meetings and Events
- Project Deliverables (publications, materials, documents, tools, products, etc)
- Activities aimed at sharing project's results (dissemination costs).

Please be aware that the eligible costs categories and/or the eligible costs lists may vary in various grant programmes. Please also have in mind that for each grant programme there is also a list of ineligible costs, defining which costs can not be co-funded from the grant. You will find both costs list in the 'beneficiaries guide' or other attachment to the call of proposals.









Apart from planning of the objectives, activities and deliverables, planning the proper project financial management is one of the most critical steps while designing the project. The project budget planning should be preceded by detailed planning of the project activities aimed at realising the project goals and planning the allocation of resources to each activity (time, staff, technical resources, etc.). This way each project activity would have a corresponding budget. The project activities are usually grouped into Work Packages (WPs). You will read more about it in the chapter 4.

The budget for each project activity is requested only once at application stage. When the project gets cofunding, and the planned implementation program needs to be modified or updated, it does not mean requiring another grant, as this would add to unnecessary waste of resources. Instead, in case of any needed and justified changes for adjustments during the implementation stage, the beneficiary may modify the budget allocated to specific work packages and related list of activities. Some of these changes would require amendments to the grant agreement though.

For each work package, the budget is divided among the project partners, according to the tasks they perform. It is essential that each project partner accepts the budget assigned to the activities it is expected to perform before the project is submitted.







Usually, the grant for the project realisation is paid in 2 or more tranches: The first payment is usually done after signing the grant agreement. The next tranche(s) are usually paid after accepting the project interim report(s); the last payment – so called 'balance payment', is done after the final report form the project realisation is approved. All the project activities planned need to be realised, on the implementation stage, with a high quality. It is worth to remember that the project results, outcomes and impact will be evaluated at the final reporting stage.

If one or more activities are not completed, partially completed, or are assessed as unsatisfactory in the quality assessment, appropriate reductions in the amount of the grant may be applied at the final reporting stage. This evaluation may result in non-acceptance of some work packages or single activities (reducing the budget accordingly) or in reducing the overall amount of the grant by a fixed percentage. Full payment of the grant will be awarded if, at the final reporting stage, all activities are completed in accordance with the quality criteria described in the application.

The flexibility granted by the EU funding process allows beneficiaries to operate within their own resources and allocate funds in accordance with their needs.



Planning the budget management





As mentioned above, the distribution of the budget shall be presented at the level of work package, as in the example below.

In addition, applicants can also indicate the allocation at the level of activities.

| | Coordinator | Partner 1 | Partner 2 | Partner 3 | Total |
|------------|-------------|-----------|-----------|-----------|---------|
| WP 1 - | 20 000 | 10 000 | 10 000 | 10 000 | 50 000 |
| Management | | | | | |
| WP 2 | 30 000 | 20 000 | 20 000 | 30 000 | 100 000 |
| WP 3 | 20 000 | 30 000 | 30 000 | 20 000 | 100 000 |
| Total | 70 000 | 60 000 | 60 000 | 60 000 | 250 000 |

At the level of project designing, the financial management is planned, including the rules for sharing the project budget with the project partners. The partners define the rules for financial reporting within the partnership that are later on executed by the project manager. In the project guide you will find the tips what kind of financial documentation will be needed for documenting the project costs. These rules should be clear for all the project partners.

Please check this **guide** to learn more about the financial procedures the project manager should follow, including those related to making any payments to the project partners. Here you will find all the information you need about **payment conditions, financial management** of the project, **financial reports, and financial support documents**.









List each of the lines from 1 to 5 (where 1 is strongly disagree; 2 disagree; 3 neither agree or disagree; 4 agree; 5 strongly agree):

- I feel better prepared to identify the types of financial support that exist in the EU.

I can identify what kind of funding I could get for my project.

03 I feel able to find a funding for a project application.

I know what types of funding I could use, for each of the key action (of the Erasmus+ Programme).

I know how to distinguish between the different key actions 05 (of the Erasmus+ Programme).

06 I am able to help someone else with the information I have read.

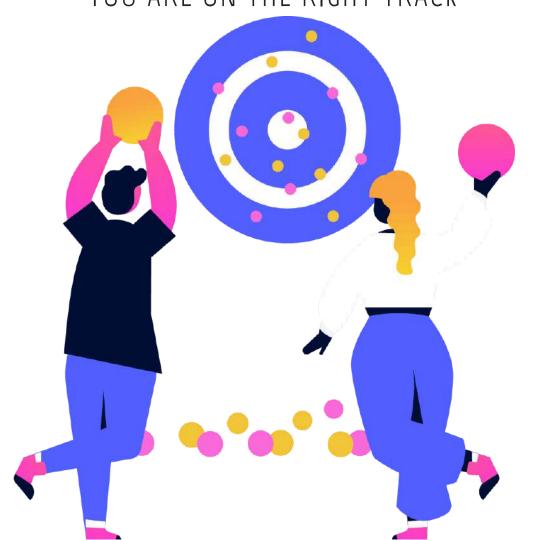


Please read this topic again

You're almost there, you just need to go over a few details and you'll certainly be ready to move forward on this topic!



AMAZING YOU ARE ON THE RIGHT TRACK







Make a fair distribution of the money!

Create your own excel sheet to do the calculations!

Each partner should be paid for the responsibility and amount of tasks in the WP!

See the example!

GOOD LUCK!



HOW TO FIND AND CHOSE THE PROJECT PARTNERS?

By Marianna Labbancz and Carmen Malya,
Folk High School Association Surrounding Budapest



How to find and chose the project partners?









The <u>challenge</u> addressed by this chapter: To find and properly apply all the methods with which we can find and select the most suitable partner(s) for the realization of our project idea



Estimated time for studying this chapter and doing the practical activity: **1 hour for reading** and **1 hour for the practical assignment.**

Learning Objectives

After studying this chapter, you shall be able to:

- Determine what kind of suitable partner organization(s) is/are needed to implement the given project idea;
- Choose the way or means to reach the desired, potential project partner(s);
- Apply appropriate selection criteria and scoring to select the most appropriate partner organization(s).











The fundamental element of international cooperation is the partnership.

Without partners, there is no cooperation, and this is the very first obstacle that must be overcome by an organization that wants to implement its project in a joint work.

In this chapter, we will help you on how to search and how to choose the most suitable partner in order to successfully realize your idea in the frame of international, European cooperation.



Relevance of a partner in the international projects





Each organization has a different set of values, priorities, resources, and competences.

The challenge of implementing a project in international cooperation is to bring these diverse contributions together, linked by a common vision, in order to achieve sustainable development goals.

Organisations choose the partner because – beyond the requirement of the calls for proposals - they could not achieve the desired goals by non-partnership means. In other words, it is important for each partner to clarify, in addition to achieving joint results, what is their own interest during such a cooperation.





Why is the partner search a fundamental issue in the international projects

Organizations that want to work in partnership must decide on this at the very beginning of formulating the project idea. During the engagement with other organization(s) may bring many benefits and a synergistic connection can be created, and thus it could establish a win-win situation for both parties. Such potential benefits include:

- Broader access to knowledge and information: Partners from different countries due to the countries' different historical and cultural backgrounds may have different approaches to the given topic.
- Access to people: Collaboration builds on wider expertise, experience, skills, and networks.
- Innovation: Since partners approach different topics from different perspectives, this gives the opportunity to deal with problems in a new way.
- Development of competences: During the cooperation, the professional and social competences of the participants in the cooperation develop significantly. The development of the professional skills and competences of the partners is a significant, unavoidable, and unintentional advantage of international cooperation.
- Long-term spillover effect: The sustainability and utilization of project results can be even more effective through the existing networks of partners in their own countries.

It is beneficial for the partnership as a whole if each partner organization sees tangible added value to their own organizational operation during the cooperation. It is therefore the interest of the partners that they are aware of their own organizational goals and that the cooperation contributes to them.









Why is the partner search a fundamental issue in the international projects

At the same time, organizations must take into account possible risk factors, which can be:

- Loss of a certain level of autonomy in relation to the given project: the challenge of joint decision-making processes; the need to build consensus with the partners.
- The difference between the interests of the partnership and the partner organization: a decision may be made that corresponds to the interests of the partnership but may conflict with the interests of the individual organization.
- More intensive use of resources: the time and energy required of key employees in partnership building and project development can be significantly more than in the case of non-partnership projects.

The implementation of the project is a challenge for the participants, since during the implementation of the project in partnership, the joint task is to carry out all management, follow-up, reporting and evaluation activities.

After considering all of these benefits and risks, choosing the right partner can take some time and effort, but it's important to find someone who matches your values, and shares your vision.



When formulating these questions, it is worth taking a

look at the conditions of the call for proposals and

form the conditions accordingly.

What would we like to implement - what kind of partner do we want?





When an organization wants to implement its idea in a partnership, it needs to find a party that is willing to make a similar effort to create a joint work.

First of all, clarify the answers for a couple of guestions to find out, what is the ideal profile of the ideal partner:

What kind partner would you like to co-operate with? And which partner organisation would you not like to have? Why?

Are you looking for an organisation which shares the same background? the Shares same objectives, works in the same field? Deals with the same challenges? Or rather some organization of a different profile from yours?

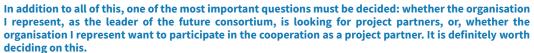
Which country should your partner organisation come from? Why?

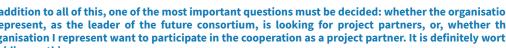
Are you looking for a completely different experience with a country or several countries in other parts of Europe? Or would you prefer to he many similarities there?

Which language(s) are you or colleagues going to use for international communication and during vour international activity? Are you looking for a with country common or similar

language?











Some methods of partner searching





The questions mentioned above will help you get started. They help clarify expectations and orient partner search initiatives

- 1. How do you find the right partner organizations?
- 2. Use your networks
- 3. Search by theme and sector
- 4. Searching via Project search









- In the frame of Erasmus+ program, Adult Education organisations the **Erasmus+ Project Results Platform** is the best place to start. Here, the lists all the current and completed Erasmus+ projects can be found, including the partners involved. You can browse the platform by country or by keyword, the field of activity or a combination of them. If you want to narrow down organisations by sector, there are several options available.
 - can browse for partners or create their own listings through the EPALE partner search site here
 - **Youth** organisations can do the same though OTLAS, the partner finding tool on the SALTO youth site here
- The **EPALE** partner search function can be useful for vocational organisations.
- There are also a number of unofficial websites and **Facebook** pages dedicated to connecting partners. These are, for example: EU Partner search, Finding partners database, Erasmus+ Partner Finding Facebook page.







5. Take part in a contact seminars

Various national organizations and grant programme agencies across Europe, organise international meetings. They encourage collaboration and sharing of good practice in the frames of various European programmes, like Erasmus+, and often focus on specific topics in education, training, and youth work. Some events, known as contact seminars, are intended specifically for finding partners and developing common project ideas.

It is advisable to participate in international events and activities where other potential partner organizations are also present (e.g. conferences, seminars, meetings, etc.). In this way you can get to know their representatives and organizations and see how well they match the answers to previous questions. As with interpersonal relationships, be aware that you often don't find the perfect match and that compromises and flexibility are required.

Alternatively, try to attend international trainings and seminars on a topic that is of interest to your organization. You may find here an organization with similar interests that could be the basis of a joint international project.

It is worth to know that many of those contact seminars, international trainings and meetings are co-financed in the frames of various European programmes. The participation may be free of charge. If admitted to the event – also the costs of your travel and accommodation may be covered.

There is a variety of services to assist you in finding the right partners for your new project, but the best way to do it is through your personal contacts: previous collaborators, conference acquaintances, international peers who share your interests, etc.











Platforms for Calls of Applications (Examples)





S

European Social Fund

Creative Europe Project results





How to present yourself and your project idea





Most likely, at this stage of the partnership building process, you have already decided whether you want to participate in the project as a project partner or as a project coordinator.

This is also how the organization you represent should be presented during the introduction. Based on the described partner search methods, we can introduce our organization to the desired organizations in two ways:

1. On the one hand, you can register the organisation you represent in the 'partner search base(s)', related to the specific topic/grant programme you are interested in. While registering, apart from presenting the organisation being registered, you can also shortly describe the project idea for which realisation you are searching some partners for. The requirements for the possible partners can be also added here. It is essential to add the contact details to the specific person the interested organisations can contact about the cooperation. Then you may just wait for some enquires from the organisations interested in cooperation.

In this case the most important is to prepare your profile. Create a clear profile to raise your visibility! If you are registering for the first time, fill in all the fields to create a complete profile.

If your organization was already registered refresh it! Describe the problem you want to tackle, and how you want to go about it.

Be concrete about the kind of partners you need for your project idea. It is possible to create a profile, as the partner-searching entity, for the organization you represent and your project idea in most of the **partner search tools**.





How to present yourself and your project idea





2. On the other hand, in the case of direct inquiries (i.e. direct invitations to cooperation, through e-mail, social media, etc.), you would need to present the organisation you represent in an attractive way.

In the second case, we would recommend you to prepare two things:

- A short presentation of the organisation you represent (max. 2 pages, including the mission, goals, main activities, fields of expertise, with links to the details for ex. the webpage);
- A short project concept, presenting the project idea you would like to realise. Search for the **template of the project concept** .

In this case, of a direct presentation of the organization you represent, in addition to the basic organizational data, **two important areas** must be highlighted:

- It is important to present the previous activities, experiences, and successes of the organization in the given topic.
- Nevertheless, it is important to present the explanation of the specific topic, the solution of which the application would be aimed at. Here, it would be important to highlight ideas related to cooperation.









Start your search – and contact the chosen organisations

Browse the **profiles** in and **meet with others** on the chosen partner-search platform. You may apply the filters to narrow the group of organisations you are most interested in (for ex. the country, he topic, etc.) You must go back and search regularly because the list of registered organisations will be growing.

After making a **short-list** of the most interesting, possible partner organisations – contact the person mentioned in the partner base as the contact person for the organisation – the way it is indicated in the profile (usually, there would be a name and e-mail address provided).

In the **introductory e-mail/message** you would write to the chosen, potential project partner contact person, you just include the summary of the presentation of the organisation, the project idea, and the invitation to cooperation – always with the deadline for the answer.









After contacting an organization, take time to get to know and understand each other more deeply, and to develop a good relationship.

You must ask

- 1. What projects they have been involved in before and what they have learned from them.
- 2. What are their goals and objectives for a new project?
- 3. What communication methods do they prefer?

Unit 3 Choosing the best partner





A good partnership is one of the **foundations of a good project**, so it's worth making sure you've found the right partner!

During the meeting - which will most likely be held online - we can get a lot of information from the environment and non-verbal communication. It is important that the **decision-makers** are also present at the meeting, because then we can start to think together about the given topic.

Make the **best use of your meetings** by being prepared to ask a lot of questions, as well as to find out why the organisation you are contacting would like to become the partner for you project.

Present the organisation you represent well (show brochures, Ppt-s, etc.) to highlight what you bring to the table.

It is important to give yourself as much time as possible to decide who you will choose as a partner so that the selection is well-founded.

Many organizations may not have experience in international cooperation, and it may take time to understand the idea and become confident and capable of building a good partnership.



General requirements of partner selection





PASSION

One of the key factors that a partner must have, is passion. It is easier to work with someone who has the driving force to achieve the organization's goals than to work with someone who has been pressured to complete a certain task. Find someone who makes the implementation of the project idea a top priority.

SAME VISION

It will be very easy to achieve the common goals you have set when you work with someone who shares your vision. The mission is halfway accomplished if the person concerned has a well-constructed vision and strategy. What does this mean? When starting a partnership, you must choose a partner with whom you have a common vision for the project. This forces the partners to do everything for the same vision, with the same commitment, to realize the vision within the prescribed time.

NETWORKS

Depending on what kind of project the partnership wants to implement, it is advisable to look for a partner who has extensive connections with organizations active in the given topic.

EXPERIENCE

If you want to deal with a topic in which you do not yet have sufficient experience, you should look for a partner who has experience in this area. This situation can be a great help if you encounter difficulties during the implementation of the project. In this case, the partner's experience and expertise are an important aspect, and considerable knowledge and skills can be acquired during the consultations.

RESILIENCE

A risk-tolerant partner is needed during the implementation of the project. Sometimes there are situations where you have to step out of your comfort zone.

HONEST AND TRUSTWORTHY

If this is possible, it is advisable to choose a partner who has already proven his reliability in other situations or in other projects, both in communication, financial and other important matters.









In addition to the general aspects of selecting a project partner, it is also important to take into account various special aspects.

On the one hand, these criterias were already discussed

On the other hand, there are special eligibility criteria for each partner, which are included in each call for proposals, which can be very different depending on the content and purpose of the call, which could be the following:



Experiencescompetences-skills

Several calls for proposals require special competences from the persons participating in the project. Experience related to the expected activity must be proven.

Territory covering

Most applications are only open to organizations based in the countries listed in the Announcement. Sometimes there are also regulations on organisations from which countries cannot be a coordinator.

Organization al maturity

In most cases, organizations that have been operating for a year, i.e. they have a closed financial year, can submit applications. There are only a few exceptions to this rule. Of course, the optimal situation is when the project coordinating organization has more

Minimal requirements of the call – is it enough?

experience than the partners.

In addition to the necessary documents, it may be useful if the partners and the coordinator attach documents to the that demonstrate their application professional and financial ability to successfully implement the project.







Before you apply with a project to be implemented in international partnership mandate letters are essential. It is a bilateral agreement between the coordinator organization and each partner organization taking part in a project by which the partner organization authorizes the coordinating organization to act on its behalf in matters related to the project implementation.

The **Mandate Letter** or **Letter of Intent** is usually a template documents that can be found among the documents of the call for proposals.







Sample for scoring the partner

List each of the lines from 1 to 5 (where 1 is Low and 5 is High):

Characteristics / partnering capacity (actual or potential):

| 1 - 5 | 1 | 2 | 3 | 4 | 5 |
|--|---|---|---|---|---|
| 1. A good reputation and track record in their sector? With other sectors? | | • | | | |
| 2. Skills, competencies and / or other useful resource contributions? | | | | | |
| 3. Sound management and governance structures? | | | | | |
| 4. Good communications channels and access to networks / information? | | | | | |
| 5. Good financial management track record? | | | | | |
| 6. Willingness to innovate and learn from experience? | | | | | |
| 7. Interest in and willingness to collaborate? | | | | | |
| 8. Sticking power when things get tough? | | | | | |

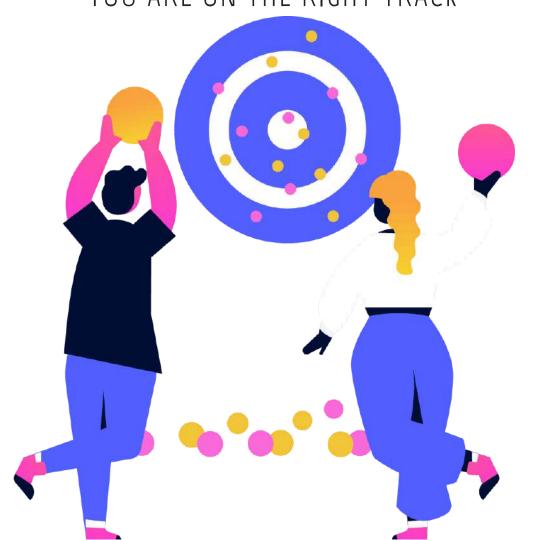


If you have answered more "1s" then "5s" – it may be worth to search for some other partner organisation....

You're almost there, you just need to go over a few details and you'll certainly be ready to move forward on this topic!



AMAZING YOU ARE ON THE RIGHT TRACK







Please register your organization on this website! If you do not have EPALE account please prepare it!

- 2
- If you are ready with your registration, please prepare your partner finding announcement!
- 3

If you are ready with your partner finding announcement, you can search among others' partner finding announcement! (1)



If you want to know more click here! (5)



WHAT IS THE PROJECT STRUCTURE/ FRAMEWORK?

By Lorenza Lupini and Luca Bordoni, Cooperativa Sociale COOSS MARCHE ONLUS scpa



Unit 4 What is the project structure/framework?









The <u>challenge</u> addressed by this chapter: How to structure a project idea, both from the point of view of the process and of the tools, steps, terminology, and practical cases in order to prepare a complete project proposal answering a specific call for proposals.

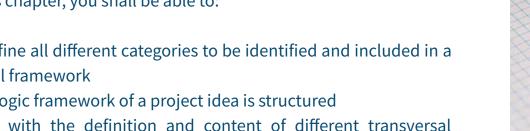


Estimated time for studying this chapter and doing the practical activity: 1,5h studying - 2h the practical assignment.

Learning Objectives

After studying this chapter, you shall be able to:

- Know and define all different categories to be identified and included in a project logical framework
- Know how a logic framework of a project idea is structured
- Be confident with the definition and content of different transversal activities of a project (i.e. management, evaluation, dissemination)
- Create a project timetable (the Gantt chart)













The previous chapters of this Toolkit are showing how the attempt to access the community funding starts from the formulation of an initial project idea, which can arise from evaluations of very different types.

The definition of a good project idea is of fundamental importance for the subsequent development of the project. It in turn requires a number of important preliminary activities:



The collection of contextual information



The formulation of the reasons for the action (the project) to be pursued – naming the needs/challenges to be addressed and the reasoning why should those needs/challenges be addressed



Analysis of one's own degree of ability in presenting and managing the project



The collection of information and the analysis of what has already been achieved in the same area, both in Europe in general and in the reference territory (i.e. the territory the project activities are to be realised on)



Reflection on the possibility of producing a significant impact on the beneficiaries, in line with what is requested by the grant providers



Recognition of funding sources and structuring of a sustainable project.



Now we have a strong project idea, a consortium/partnership (human resources) and a possible grant to finance it chosen.

The next step is to "put in practice" our idea, planning in detail the implementation strategy, and describing it in the project application form.









In this section we will analyse how to structure a project idea, both from the point of view of the process and of the tools, steps, terminology, and practical cases in order to applicate a proposal in a grant.

The logic framework

It represents one of the most important tools for evaluating the soundness of a project idea, on the basis of different categories identified.

The elaboration of the logical framework constitutes one of the first steps of the design activity and allows to summarize, in a single document, much of the analysis work necessary for the formulation of the actual project.

This document then becomes the basis for assessing its progress and achievements in the implementation phase.













The essential structure of the logical framework is shown below. The different categories that it uses are defined and analysed in the following paragraphs.

| LOGICAL CATEGORY | INDICATORS | INDICATORES | |
|---|--|---|--|
| General Objective / Impact The contribution of the project to a global objective of a systemic and political nature | How to measure the achievement of the general objective (quality, quantity, time, starting and ending point) | Proofs to verify the reaching of indicators (How, when, from whom, from what sources the information relating to the indicators is collected) | |
| Specific Objectives The nature of the benefit(s) of the project for the target group | As above (but related to the Specific Objectives) | As above | |
| Results Tangible products or services implemented as part of the project | As above (but related to the Results attended) | As above | |
| Activities Specific actions needed to carry out the project and deliver the planned results | Resources Necessary to carry out the activities | Costs | |







In the project structure there are general and specific objectives



The first one (General Objective/ general aim or Impact) A well-worded objective (aim) will therefore be SMART. Aims and objectives are the basis for choosing the method, planning the actions, and implementing them. Throughout the project, objectives need to be revisited to monitor the progress towards their achievement.

At the end, they will serve to demonstrate to what extent they have been achieved. For more information concerning the goals setting, have a look to the Chapter 1. A Specific Objective



Represents our main intents that we have to reach. The results and the impact that our project should achieve need a strong connection with the objectives we plan and describe. When you formulate a goal for a grant proposal is important create a link with real and concrete needs/challenges that your project have to satisfy. Therefore it is recommended to define the needs/challenges you would like to address first, and on this basis, to set the general objective and the specific objectives.

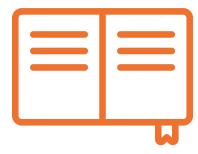
Instead, is a most concrete one and it must be measurable (in qualitative and quantitative terms) and achievable through the activities that we are going to develop. Each objective must correspond with one or more results, to be reached by one or more activities implemented. We have to pay attention to the feasibility of the project objectives, because they must be delivered within the timeline planned for the project realisation.



General and Specific Objectives - pratical examples







GENERAL OBJECTIVE

Promote the economic and social development of rural areas.



Key questions to ask yourself:

- 1. Why is it necessary/needed to promote the economic and social development of the rural areas?
- 2. What is the general impact you want to achieve on the population of the reference area?
- 3. To what extent is this impact consistent with the priorities of the regional, national, and European authorities, as well as with what has been achieved by other key players operating in the area?



SPECIFIC OBJECTIVE

Create new employment opportunities in the tourism sector for young people (18 – 35 years old) living in the rural areas in (specific country/countries/regions, etc.)



Key questions to ask yourself:

- 1. What is the specific problem(s)/ challenge(s) you want to address and solve through the project, related to the need named for the general objective setting?
- 2. What needs does the project respond to and what benefit should it bring to the categories of beneficiaries it addresses?









Results: outputs, outcomes, and milestones

The project result represents what the project produces in concrete and tangible terms. Each result is the culmination of a series of activities aimed at solving the central issue addressed by the project, in one of its main dimensions.

Output (or material/tangible result) is a tangible service or product carried out by the project. It represents the evidence that the objectives have been achieved.

They should be supported by qualitative and quantitative indicators that allow to measure the project impact (for example: a publication, a training programme, a theatre performance).

The outcome (intangible/immaterial result) is the effect, the consequence of the results that is generated by the project (for ex. Increase of knowledge, upgraded competences, raised awareness).

It is worth to mention both the outputs and outcomes need to be measurable – the same as the objectives.







Unit 4

Results: outputs, outcomes, and milestones







- Resources dedicated to or consumed by the project
- Usually a NOUN staff, facilities, money, time...
- What the project does with inputs to fulfill its mission
- Usually a GERUND a verb in its"-ing" form, such as assessing, enabling, reviewing...
- The volume of work accomplished by the project
- Usually a QUANTITY the number of projects, the number of case studies...
- Benefits or changes
 The long term for participants during or after project activities
- Usually a CHANGE better projects, increased skills...
- consequences of the intervention
- A fundamental CHANGE intended or unintended in a system or society

Your Planned Work

Your Intended Results



Unit 4

Results: outputs, outcomes, and milestones - pratical examples





- If we consider, as an example the "First-time international project realisers support network" project, the material result (output) is, for example, the handbook about designing, planning and organising international.
- European training courses for the first-time international projects realisers available on the FIRST Network platform.

The outcomes (immaterial, intangible results) were, for the trainees taking part in the pilot training courses:

- Increased level of knowledge in the field of European project management (assumed: increase of 3 points on the 10-points scale, for 30 persons taking part, measured by a pre-test and post-test);
- Increased motivation to initiate and realise European cooperation (assumed: increase of 3 points on the 10-points scale, for 30 persons taking part, measured through self-assessment).

? Key questions to ask yourself:

1. What are the concrete results that the project must achieve (or the tangible products that it must produce) to achieve its objective?



That is: in what dimensions is the problem to be addressed or the benefit to be brought divided?









Results: outputs, outcomes, and milestones - pratical examples

The **milestones** represent the intermediate goals, a sort of check points within each phase or corresponding with the delivery of specific deliverables. They are normally activities that are conventionally considered to have "no duration" and are used to define the main verification moments in the project running. They can coincide with presentation meetings, sending reports, events, etc.

For example, if a project would have **3 main phases**: I. Research and analysis – II. Testing and implementing – III. Sharing the project results, the milestones could be:



For the phase I: Research realised.



For the phase II: New solutions tested.



For the phase III: Dissemination campaign realised.



Setting the milestones make sense for longer and more complex projects. If you are planning a year-long initiative with 3 European partners involved – you would probably not need the milestones; setting the aims and objectives would be enough.







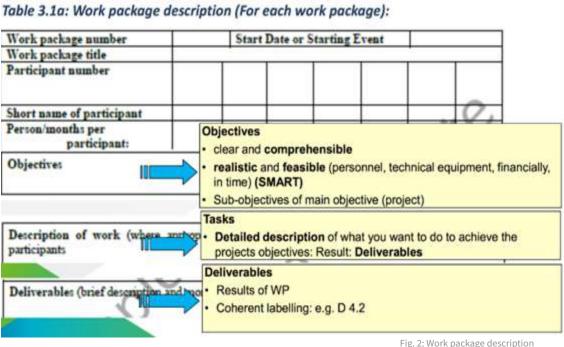
Work package (WP) means a major sub-division of the work to be done in the proposed project.

A work package is a group of related tasks and activities within a project. WPs are the smallest units of work that a project can be broken down into.

There's a difference, however, between a work package and an activity in a project.

Therefore:

- A single activity is not a WP
- A single task is not a WPA % of progress of work is not a WP
- A lapse of time is generally not a WP
- A work package represents, instead, a sequence of tasks and activities that leads to a deliverable and contribute to reach several objectives.

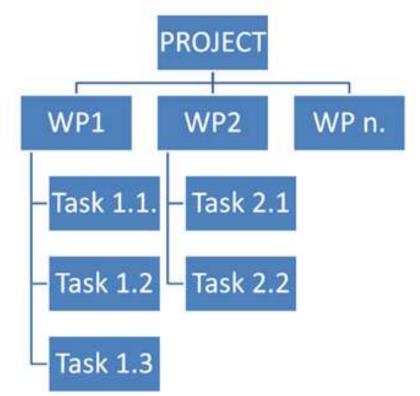












Work package

The Work Packages (here in after WP) is generally a group of related micro activities, named tasks, within a project as if they represent sub projects themselves. Because WPs look like small projects themselves, they are often thought of as sub-projects within a larger project.

Work packages are the smallest unit of work that a project can be broken down into when creating your Work Breakdown Structure (WBS).

Generally, there are two main typologies of WPs defined: Vertical and Horizontal







Vertical WP

The Vertical WP include the specific macro-activities proposed by the project.

A vertical WP can concern the analysis of needs in relation to the call characteristics and priorities. It can also include the technical activities through which the project will develop and achieve the expected results.

Horizontal WP

A work package is named Horizontal when it concerns activities that are performed along the whole project duration and that are often carried out on a continuous and scheduled basis. The typical horizontal WPs are related to the project management, evaluation and dissemination.

Project framework

A project framework based on WPs also allows to plan a balance of work - efforts within the project. The specific WPs are assigned to the specific partners based on the skills and experience of the partners, at the project designing stage. Therefore it is essential for the project designer to learn well the fields of expertise of the partners invited to the project. The fields of expertise must be complementary and must include all the competences needed for the successful realisation of the planned project.











Work Package

The WP includes specific activities which are generally organized in a specific order and with clear connections to each other.



The **time** necessary to carry the activity out

- **When** would it be best to do it, before/after/or in parallel with another activity;
- If there is an interdependence relationship between two or more activities, which one would need to be completed first, to proceed with the next one?









They include the following:

- Work package objectives;
- Description of activities;
- Timetable with milestones;
- Outputs and deliverables;
- Roles and responsibilities;
- Relationship to other work packages.

The activities represent our **How, and How to Do** in order to reach the results and satisfy our goals and specific objectives declared.

The task is an action to accomplish in a project, a single step within the WP.

A **task** is linked with a deadline and must contribute towards work-related objectives.

As a work package can be considered as a sub- project, the key elements of a work package resemble those of a project.









The "horizontal" WPs are representing transversal macro-activities of each project:



Management

It is the WP that belongs to the **project coordinator**. This WP defines the **operational procedures** for project management and includes the number of **international meetings** to be held, the **place** where to carry them out and the due **dates**, also included in the Gantt chart. One of the coordinator's duties is reporting the results of the meetings and the decisions taken by the partnership through the minutes.

It will include sections on how the team will **manage issues**, scope change, risk, quality, communication, administration, etc. It will also make use of the project organisation chart.

Monitoring and evaluation

The **monitoring** aims to check and verify the WPs progress in line with the project indications and objectives. It is based on the following criteria:

- **Relevance** (does the project concretely responds to the needs of the final beneficiaries?)
- **Effectiveness** (is the project reaching the expected benefits and is it being efficiently managed?)
- **Efficiency** (is there the capacity of the partnership to achieve and satisfy the goal set?)
- **Sustainability** (does the project produce benefits and results that go beyond the project duration?)
- **Impact** (the level of change in the society generated by the project).
- **Added value for the EU** (do the project achievements respond to the priorities of the European programme that finances/co-finances the project?)











The **evaluation** is an activity connected with the monitoring that allows to make a report with the information, statistics, critical issues, etc. and the solutions adopted by the project consortium to cope with any possible problem that emerged.

Evaluation can be also defined as the systematic appraisal of the success and quality of a project. Success refers to whether the project objectives have been achieved, and quality refers to whether the needs of the stakeholders have been met.











Types of evaluation

Depending on the purpose of the evaluation, a distinction can be made between formative (or process) and summative (or effect, impact) evaluation.

- I. Formative(process) evaluation aims to assess initial and ongoing project activities, with a view to improve the work in progress and increase the likelihood that the project will be successful. It is done at several points during the project implementation, and has several components:
 - Needs assessment
 - Evaluability assessment
 - Implementation evaluation
 - Progress evaluation
- II. Summative (impact) evaluation aims to assess the quality and impact of a fully implemented project, and to verify if the project has reached its stated goals. Summative evaluation also has several components:
 - Outcome evaluation
 - Impact evaluation
 - Cost-effectiveness
 - Cost-benefit analysis







Steps in the evaluation process

1 Identify key evaluation points

4 Collect data

2 Formulate evaluation questions, indicators, and targets

5 Analyse data

Select an evaluation design / model

Report evaluation findings







Dissemination: What is it?

It is the macro-activity which allows to communicate the results achieved by the project at each stage, making visible to the external all aspects of the activities. It represents the process of making the results and deliverables of a project available to the stakeholders and to the wider audience. The dissemination activity is strategic because the project results must be known by, and useful for, as many representatives of the target groups defined for the project, as possible.







SHARING TECHNOLOGIES



SHARING MANUFACTURING METHODS



SHARING KNOWLEDGE







Planning for dissemination

To ensure that the project results will be used and embedded in the defined community, a project must develop a dissemination plan that explains how the results and outcomes of the project will be shared with the stakeholders, relevant institutions, organisations, and individuals.

Specifically, the dissemination plan will explain:

- Why the purpose of dissemination;
- What will be disseminated the messages;
- Whom the audience;
- How the method;
- When the timing.

Ideally, the dissemination plan would link with a broader dissemination strategy for the results and outcomes of the grant programme, within which the project co-financed (for example, for the Erasmus+ Programme co-funded projects, the project results could be promoted during the Erasmus+ Days happening in the whole EU each year). The dissemination strategy should be planned in consultation with the project partners and approved by the project management committee.









Stakeholder analysis

The dissemination strategy should be based on a stakeholder analysis.

A stakeholder is anyone who has an interest in the project or will be affected by its outcomes.

A stakeholder analysis is an exercise in which stakeholders are identified, listed, and assessed in terms of their interest in the project and importance for its success and further dissemination.

Key stakeholders that are really important to the success of the project can act as 'champions' to ensure your project has a high profile and that the results are made known.

Defining the purpose of dissemination is a first step to decide on the audience, message, method, and timing of the dissemination.

Key elements of a dissemination plan

- Purpose of the dissemination activity may be to:
- Raise awareness
- Inform
- Engage
- Promote







Stakeholder analysis

Audience:

who you want to reach and what they can do for your project.

The audience may be considered:

Internal audience:

the members of the project consortium and your own institution.









Another project

External stakeholders: who will benefit from the outcomes of the project, as well as "opinion makers" such as teachers, researchers, librarians, publishers, online hosts, etc., can act as catalysts for the dissemination process.

The community

These elements can be shared with the wider community through articles, conference presentations, case studies, etc.

Message:

- Clear, simple, and easy to understand.
- Tailored to the receiver(s).
- Correct and realistic.







Methods and channels

While there are a wide variety of dissemination methods, it is important to select the right one(s) to get your message to the target audience and achieve your purpose.

- Newsletters, flyers, and press releases can create awareness about the project.
- Reports, journal articles, and websites can transmit information about the project.
- Conference presentations and websites are ways to promote the project and its outcomes.















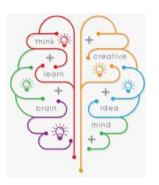
Timing

When planning the dissemination, it is important to decide when different dissemination activities will be most relevant.

The ideal timing will depend on the progress of the project as well as on the agenda of the target audience.

For instance, at the start of the project, it is best to focus on raising awareness.





At the end on highlighting the achievements and deliverables. In terms of the "receivers" agenda, the time commitments of the target audience and stakeholders should be considered.



Unit 4

How to plan a WP - Dissemination





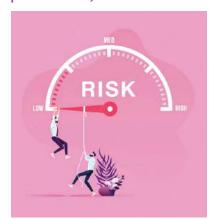
Risks handling

Risks refer to potential events or circumstances outside the project team's control that will have an adverse impact on the project. When the planning work is occurring, the project team should identify all known risks.

For each risk, they should also determine the probability that the risk will occur (low – medium – high) as well as the potential impact to the project (low – medium – high).

Those events identified as high-risk should have specific plans put into place to mitigate them.

There are many things that can negatively impact a project. From the loss of key personnel to material prices unexpectedly increasing, unforeseen technology issues requiring a costly redesign, manufacturing problems, and so on.



There are many potential things that could keep you from successfully creating and delivering your project results. Therefore the assessment of the impact of the possible risk situations and the mitigation ideas for at least for these of medium/high impact and probability are thoroughly planned and included in the project description. We call the collection of these negative potential things the "project risks". One of the steps of the structuring of a project is to actively identify, assess, and plan for the possible occurrence of these project risks. This is known as **Risk Management**.







What are project resources?

In project management terminology, resources are all the items that are required to carry out the project activities.

They include people, equipment, facilities, time, money, or anything else required for the completion of the project.

All these elements are interrelated and linked to the scope of the project. Each of them must be estimated and managed effectively if the project is to be a success.

Poor management of resources may lead to unanticipated costs and even an inability to complete the project. It is therefore essential to make a careful estimation of the costs for the project and to provide for resources.







Resource planning entails estimating the needed and expected input, in terms of time, human and financial resources, necessary to achieve the project objectives.



Planning

n

This includes:

• <u>Time allocation</u>: Time is a critical resource for any project. Project managers who succeed in meeting their project schedule have a good chance of staying within their project budget. To enable time management, the different project activities need to be detailed and prioritized. The allocation of project elements in a timeline, including the dependencies of the tasks, is often represented in the form of a Gantt chart. This chart is a type of bar chart representing the project schedule and marking the start and finish dates of the main elements of the project (see below).



• <u>Human resource planning</u>: a realistic estimation of the staff input, based on an estimation of which type of staff (having what competences) will be required for the tasks that are planned. It also includes the anticipated number of working days for each of the staff persons.







• **Financial plan:** a realistic estimation of the financial inputs, including a realistic estimation of sources of income (including allocated budgets, project-specific funds, as well as staff time and expertise), and the planning of expenditure over time.

It could be kept in mind that foregoing other opportunities with the organization, partners, and the community at large are also costs.

Here, you would also include the planning for acquiring the necessary own-financing, if the project would not be financed 100% from the grant.

Also here the financial liquidity and financial capacity topic appears. Have in mind that the last payment of the project grant, in most cases, will be done only after the project final report is approved (i.e. each partner would need to cover the last project costs from other resources than this particular grant).







The **Gantt Chart** is a technical tool of project management that provides a graphical illustration of the workplan.

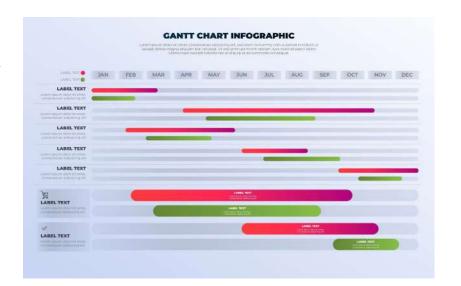
On the Gantt chart, each activity, task and milestone must be included, with the specific duration defined.

The chart allows to make clear and easy the timeline of our design and allows the project evaluators to better understand its feasibility.

Usually, the activities included in the Gantt are illustrated with different colours to make the chart easier to read.

Other characteristic of the chart is the temporal reference that generally, is stated in months: M1 (acronym of Month number 1), M2, M3, etc.

If a project last 2 years, the diagram will show graphically **24 months of activities**.









Here is the **list** of the items that characterize the Gantt Chart and that allow to decipher it:

1. Dates

- The project always starts the defined day/month/year and ends the defined day/month/year. These are also the starting and end dates at the chart.
- The time-span between the start and end date allow the project manager to 'see' the project life period, from the Kick Off meeting until its final event/conference.
- All the milestones, deliverables (outputs and outcomes) and project meetings/events also have a specific due date pictured on the chart.
- Activities Generally, the lines (rows) of the Gantt chart represent the different Work Packages (everyone with its specific colour). Each WPs can include several tasks that often are visible by lines of the same colour under the WP.







2. Scheduling

The graph indicates when each activity must be carried out. This permits to ensure delivering each task, and consequently, the entire project. Is completed within the expected timescales.

3. Connections/dependencies

Some tasks can be performed at any time, while others must be start before or after completing another task. A Gantt chart shows these dependencies.

4. Progress

The graph shows you the exact project progress and which activities have already been carried out. It's possible to have a complete overview of what remains to be done and, if necessary, to postpone the end of some activity or project (in the last case the approval of the relevant EU agency/authority is necessary).



Unit 4

Timetable/Gantt - Practical examples:





WP1 could be the WP of the project management.

The activities, WP 1, could include:

- Task 1. Administration and co-ordination of the project resources;
- task 2. Monitoring and control of the workplan;
- task 3. Compilation and approval of interim report, etc.

| | Description of activity(ies) | TIMING | | | | | | | | | | | | | | |
|---------|------------------------------|-----------------|-----|-----|-----|-----|------------|-----|-----|-----|------|------|---------------|--------------|--|--|
| | | MM1 | MM2 | MM3 | MM4 | MM5 | MM6 | MM7 | MM8 | MM9 | MM10 | MM11 | MM12 | involved | | |
| WP1 | general | | | | | | | | | | 1 | | | | | |
| task1.1 | specific | Kickoff meeting | | 10 | - | | II meeting | | | | | | Final meeting | All | | |
| task1.2 | - | 01.1 | | | | | 02.2 | | | | | | 02.3 | All | | |
| task1.3 | _ | | | | | | | | | | | | | All | | |
| WP2 | _ | | | | | | | | | U | | | | | | |
| task2.1 | | | | | | | | | | | | | | All | | |
| task2.2 | = | | | | | | | | | | | | | P2 - P4 - P5 | | |
| WP3 | - | | | | | | | | | | | | | | | |
| task3.1 | - | | | | 1 | | | | | | | | | P1-P3 | | |
| task3.2 | - | | | | 6 | | | | | | | | | P1-P3 | | |
| task3.3 | _ | | | | | | | | | | | | | All | | |
| task3.4 | _ | | | | | | | | | | | | | | | |
| ecc | _ | | | | | | | | | | | | | | | |
| WPn | 2 | 1 | | | | | | | | | | | | | | |



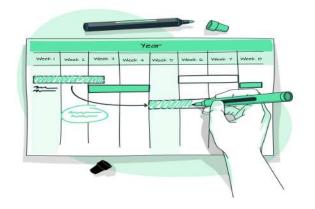
Before the submission: writing and checking





The project writing phase begins once the existence of the main starting conditions has been verified, namely:

- The existence of a project idea suitable for the identified funding/co-funding source (in terms of the topic and eligibility of the proposed type of activity).
- The existence of a call for proposals within the capacity of the organization (also in terms of expiry date, i.e. the deadline for submission of the project proposals).
- The existence of an eligible partnership in terms of administrative criteria, with solid and complementary technical and financial resources and the complementary set of competences.









The following are the key elements for preparing the proposal:

- Careful reading of the guidelines (i.e. the whole documentation related to the call for proposals). Checking and updating the context analysis.
- The clear and structured definition of project objectives and results.
- The response to the punctual requests of the call.
- The definitive structuring of the partnership and the working group.
- The accurate description of the activities.
- The drafting of a realistic and precise time schedule (Gantt chart).
- The finalization of a rigorous and justified financial plan (both in terms of resources made available by the partners and of the contribution requested). For the budget planning related issues also check the chapter 2.
- The description of the project results dissemination strategy.



Unit 4

Before the submission: writing and checking





Other Annexes - The European Commission often makes templates available for submitting project proposals, as part of the documents attached to the call. Such templates typically include all of the above mentioned elements, as well as a structure for the description of the 'work package' activities.

Evaluation criteria - The specific elements that weigh most on the success of the proposal are normally defined in the call within the evaluation criteria.



The elaboration of the proposal must first of all take into account the fundamental criteria described above: relevance, efficiency, effectiveness, impact, and sustainability. For more information related to the evaluation of the project proposals submitted, check the chapter 2.

In addition to the aforementioned criteria, it is possible to mention other particularly frequent ones, conceptually attributable to the five already listed:

- The originality and innovativeness of the project idea,
- The European dimension of the project (also defined as European added value),
- The "best value for money" (i.e. cost effectiveness of the project),
- Clarity in the use of the language and in the presentation of the proposal.







- Since in many cases the submission of proposals takes place through specific web platforms, it is advisable to devote the necessary time also to analyse the instructions relating to their use, normally present in the call documentation.
- It is not recommended to submit the proposal close to the deadline to avoid technical problems or overloading of the servers making it impossible to send by the date and time limit indicated.
- Check all document and the annexes requested.









- 1. I am aware of all the preliminary aspects to consider before structuring the logic framework of my project idea.
- 2. I am aware of different categories identified and defined in a project logical framework.
- 3. I understand the definitions and interrelations of all the project elements, i.e. need/challenge, general and specific objective/output, result/activity, Gantt chart/resources?
- 4. I am confident with the definition and content of different transversal activities of a project, i.e. management evaluation dissemination risk handling.
- 5. I am able to create a project timetable (the Gantt chart).

Yes O No O

Yes O No O

Yes No O

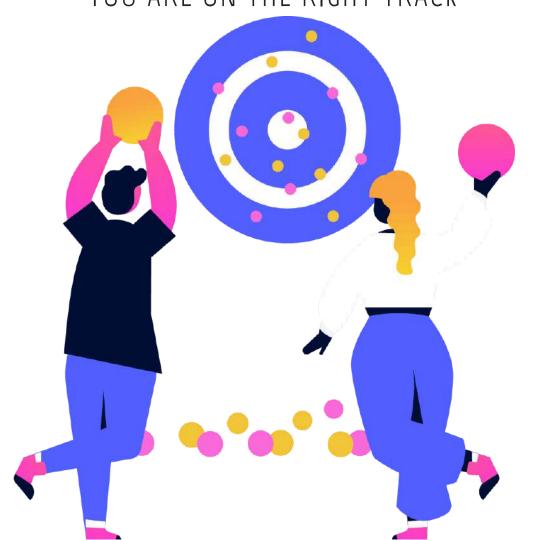
Yes No

Yes No

You're almost there, you just need to go over a few details and you'll certainly be ready to move forward on this topic!



AMAZING YOU ARE ON THE RIGHT TRACK









HOW TO CREATE A GANTT CHART STEP STEP STEP

- 1. Identify and list the of WPs (horizontal and vertical ones) of your project give them a name in order to facilitate your work clarify the objectives and outputs of each WP STEP
- 2. For each WP identified the Tasks to complete it for ex. The general WP of Management may be divided in several Tasks as: T1 Financial Management, T2 Management of activities (monitoring) T3 1st International Meeting etc.
- 3. To define the duration of each WP and respective Tasks take in mind that horizontal WPs will cover all the project duration in a transversal way; vertical WPs are consecutive to each other
- 4. Now, try to represent graphically the timeline of WPs and Tasks you can use the Microsoft Excel or Google Sheets programmes we suggest you to use different colours for each WP (and related Tasks) in order to have an easily graphic view







The image is an example of a Gantt of a project lasting a total of 24 months composed of 4 WPs (management, dissemination, training, testing); each WP are composed by several minor Tasks.

The duration of each WP/Task is represented horizontally on the chart.

| GANTT CHART | | YEAR 1 | | | | | | | | | | | YEAR 2 | | | | | | | | | | | |
|--|-----|--------|----|-----|-----|----|-----|-----|----|------|-----|-----|--------|------|------|-----|------|-----|-----|------|-----|------|-----|-----|
| WP - TASKS | | M/2 | М3 | M4 | MI5 | M6 | M/7 | М8 | M9 | MI10 | M11 | M12 | M13 | M 14 | MI15 | M16 | M 17 | M18 | M19 | MI20 | M21 | M 22 | M23 | M24 |
| WP1. MANAGEMENT | | | | | | | | | | | | | | | | | | | | | | | | |
| Task 1.1 Financial Management | | | | | | | | | | | | | | | | | | | | | | | | |
| Task 1.2 Management of activities | | | | | | | | | | | | | | | | | | | | | | | | |
| Tas k 1.3 International Meeting | IMI | | | | | | | IM2 | | | | | | | IM3 | | | | | | | | | IM4 |
| WP 2. DISSEMIN ATION | | | | | | | | | | | | | | | | | | | | | | | | |
| Task 2.1 New sletters, flyers and web site | | | | | | | | | | | | | | | | | | | | | | | | |
| Task 2.2 Dissemination Reports | | | | DR1 | | | | DR1 | | | | DR1 | | | | DR1 | | | | DR1 | | | | DR1 |
| Task 2.3 Rinal Conference | | | | | | | | | | | | | | | | | | | | | | | | |
| WP3. TRAINING | | | | | | | | | | | | | | | | | | | | | | | | |
| Task 3.1 Contents definition | | | | | | | | | | | | | | | | | | | | | | | | |
| Task 3.2 Contents development | | | | | | | | | | | | | | | | | | | | | | | | |
| Task 3.3 Tools implementation | | | | | | | | | | | | | | | | | | | | | | | | |
| WP4. TESTING | | | | | | | | | | | | | | | | | | | | | | | | |
| Task 4.1 Pilot 1 | | | | | | | | | | | | | | | | | | | | | | | | |
| Task 4.2 Pilot 2 | | | | | | | | | | | | | | | | | | | | | | | | |







UNDERSTANDING TEST GANTT charts are the ideal tool to represent in a graphic way the:

- 1. achievement of objectives and logical dependencies among the activities;
- 2. degree of efficiency of human resources;
- 3. temporal development and the progress of all the project activities;
- 4. project costs

Solution

The correct answer is **number 3**.



The representation of the Gantt charts involves drawing for each activity a bar of a proportional length on the base of the duration of the activity itself, and positioning it correctly on the time scale.



UNIT 5

WHAT ARE THE COMPETENCES NEEDED TO REALISE/COORDINATE/MANAGE AN EUROPEAN PROJECT?

By Agnieszka Dadak, Fundacja Alternatywnych Inicjatyw Edukacyjnych







What are the competences needed to realise/coordinate/manage an European project?



- The <u>challenge</u> addressed by this chapter:
 To prepare best possible to undertaking the project manager role.
- Estimated time for studying this chapter and doing the practical activity (i.e., the SMART Personal Competence Development Plan): 3 hours

Learning Objectives

After studying this chapter, you shall be able to:

- Self-assess the prior learning relevant for the field of the European project management.
- Name the key 3/5 areas where the competence improvement is needed most, at the moment.
- Prepare timely defined development plan for upgrading your competences in the 3/5 identified key areas, including answers for the questions: where – when – and how to upgrade the most needed competences (the SMART Personal Competence Development Plan).













For the purpose of this Toolkit, we assume that the project planner and designer becomes the project manager when the project gets into the realization stage.

If you are holding this book, you are already interested in European project management.

Quite probable you already have some experience in this matter.

Maybe you have coordinated some local, regional or/and national project?

Maybe you have already been a member of some project team?

And maybe you have just taken part in some European project - participated in some youth exchange, volunteering, or course/training abroad?

Whatever your prior experience is, you can build your project manager's workshop on all of those experiences.

At this point, it is worth to recall those experiences and name, what you have learnt there – and what you still need to learn.







The experience of the European civil society organisations (CSOs), confirmed in the research done within the **1stTIPPM** project show, that most of the European project managers is learning the job by doing, from the more experienced peers. It is worth to mention here that your role, at the project planning and designing stage, may look differently – depending on if you will be working for the project leader, or for the project partner. It is also worth to mention that, at some organisations, the project designer naturally becomes the project manager, if the project is co-funded.

At some organisations though, these roles are separate, and will be taken by different persons.









We all learn several ways:

Formal learning takes place at schools and universities.

Informal learning is happening during various courses, trainings, internships, etc., many of us add to our education.

But there is also **non-formal learning** – learning while doing, cooperating, and exchanging with the others. It is worth to be aware of it. It is worth to value all the three learning sources – we need them all to master a competence.

It is especially important for the adult learners to build on previous experiences.

Therefore, here we propose you to reflect on your past undertakings and experiences that may be useful for the European project manager job-role.







Our proposition is the self-assessment questionnaire*** based on the **European project manager Competence Triangle**, included in the **SMART Personal Competence Development Plan**.

We recommend you take some time to reflect on the competences related to European project management you have already acquired.

It is worth it!







As an adult person, preparing to do something new, undertaking a new job role or work, you rarely "start from scratch".

The older you are, the more experiences would you have that may help you to undertake the new role.

For the European project manager role
– make the **self-assessment** check
and name, what you already have in
your competence pot, and what can
help to master this role.









The general idea of the Competence Triangle [1st TIPPM]

The idea behind developing the competence triangle came from the need to clearly systematize and describe the key competences, needed for the European project manager job-role, being realized in the civil society organisations sector.

The **PMI Triangle** inspiration: Our competence model for the European project managers working in the civil society context has been inspired by the PMI Triangle, which has been elaborated by the Project Management Institute with central office in Philadelphia, USA.









According to the **PMI triangle**, the ideal competence set for project managers is a combination of knowledge, skills, and attitudes in:

Technical project management: More technical competences to function as project manager in a specific domain of activity.

Leadership: Ability to build team spirit, present visions for your team members and inspire them to achieve the target.

Strategic & business management: Knowledge of and expertise in the area of activity that enhances the performances.

In short, the **ideal project managers** must have a balanced competence set:

- Where they with expertise in "Technical Project Management" can plan and execute the projec.
- While their "Leadership" expertise will help them to deal with the various stakeholders in the project.
- And the "Strategic and Business Management" expertise means they better can implement and execute the projects accordingly to the strategy of the organisation as well as acting with an entrepreneurial spirit and high knowledge of the area they are working in.









This PMI methodology also emphasises that the applied competence triangle needs to be adapted to the specific areas of activity (the business field), such as the specific conditions in the civil society sector of nonformal and informal adult education, where the activities to a high degree are based on voluntary associations and volunteering.

What is important, the PMI model reflects the general project managers competences, without assigning this job-role to any specific sector. Our aim, at the **1stTIPPM** project and the **AER-V project** was to adapt the **Triangle** for the specificity of work of the European project manager, working for a civil society

organization.









The European Project Manager Competence Triangle (EPMC Triangle)

With inspiration from the PMI Triangle, the PMC Triangle (Project Management Competence Triangle) was developed. There, with reference to our own experiences, we have listed the most important competences to have for project managers engaged in European collaboration in the civil society organisations sector.

Within the **1stTIPPM project**, we have constructed the triangle with **10 competences** in each leg, in all 30 competences.

During the **AER-V project**, we further discussed the description of the competences. Below, you will find the description of all the 30 competences, divided into 3 arms of the PMC Triangle.

The descriptions of the competences were now additionally, slightly adapted for the need of this Toolkit. The 10 competences in each arm are presented in random order without any priority.









You may use the EPMC Triangle in order to:

- Better understand what the job of the European project manager is about what are the tasks and challenges;
- Self-assess the competences you already have in the field;
- Plan your further development in the field;
- Prepare yourself and/or the team of the organization you represent to planning and designing European projects;
- Recruit the project team members with the needed competences to design and develop a project idea for the organization you are working for.





The **technical competences** refer to the ability to plan and execute the project.



1 English Language

i.e. high level of reading, writing, and speaking English as the common foreign language in European cooperation, incl. knowledge of and ability to properly apply the terminology related to adult education/lifelong learning, to the civil society organisations context and the European projects' calls and management.

2 General fund-raising skills

i.e. ability to: design and express a project idea in a structured manner answering clearly named needs; choose a proper co-funding programme; find, chose and engage co-applicants; plan and agree with co-applicants on the disposition of the key project tasks and responsibilities, according to the involved partners expertise, concluded in designing and submitting a project application to a specific call for proposals.

3 Organising and running Idea Workshops

i.e. ability to execute some brainstorming sessions, where engaged stakeholders elaborate and qualify the preliminary project ideas or design solutions to identified needs and challenges.

4 Project planning and scheduling

i.e. ability to: plan the break down structure of the work programme according to clearly defined goals set as SMART (Specific / Measurable / Achievable / Realistic / Timely defined); plan the key activities and outputs; estimate the time needed for implementing each task.

5 Evaluation strategy planning and realizing

i.e. ability to plan, conduct and report progress and accuracy of reaching the project goals, defining evaluation methodology including both process evaluation, impact evaluation and sustainability of the project results, incl. procedures of designing online evaluation tools and reports to key stakeholders.

6 Budgeting and cost estimation

i.e. ability to estimate and assign relevant costs for each task and output; designing the corresponding budget structure and budget plan in a way making it possible to monitor the execution of the budget while implementing the project.

7 Coordinating the teamwork

i.e. ability to coordinate the work plan execution with clear procedures for controlling, if the activities are provided on time, with the needed quality and within the budget (incl. efficient monitoring and risk management), with the needed flexibility.

8 | Financial management

i.e. ability to manage the budget spending, accounting, internal control and financial reporting in accordance with the project plan, the organization financial rules and the specific grant rules.

9 Internal communication

i.e. ability to plan and implement an effective, assertive, and motivating communication with the project team that defines What, Why, Who, Where, When and How, incl. mastering appropriate ICT tools.

10 Dissemination strategy planning and realizing

i.e. ability to plan, revise/update if needed, and execute the dissemination strategy in accordance with the clearly named beneficiaries/target groups and stakeholders, including defining the specific messages, tools, and channels to effectively reach them with information, incl. appropriate use of the social media.



EPM Competence Triangle – Leadership competences





The **leadership competences** refer to the ability to handle the various stakeholders in the project, especially to build team spirit, present visions for your team members and inspire them to achieve the objectives of the project.

1 | Communication in the European CSO context

i.e. ability to communicate the project vision and meaning of the activities and results to the stakeholders in a European civil society context.

2 Motivation and influencing

i.e. ability to demonstrate the needed empathy to understand and motivate the project team and key stakeholders with clear goals and empower them to put their mark on the work, which reinforces the cohesion and coownership of the project.

3 Empathy and Situational Understanding

i.e. ability to engage in free human relationships, ability to understand and meet the needs of the project participants and ability to bringing the strengths of the participants into play.

4 | Team Building including volunteers

i.e. ability to promote ownership in the project team and related volunteers and promote constructive, collaborative work - culture with a strong mutual responsibility and motivation.

Improvisation and agility

i.e. ability act agile when needed and to improvise in unforeseen situations to ensure progress and effect by following openings, possibilities, and the flow of the context.

6 Motivation by good exemplary practice

i.e. ability to motivate by being a good example by keeping deadlines and focusing on the goals and content, to take responsibility and act in a compassionate, honest and transparent way.

7 Delegating project tasks

i.e. as the coordinator, ability to delegate as many tasks as possible to get more time for dealing with the unexpected, and to gain more time to engage the project work as a whole.

8 Moderating meetings and events

i.e. ability to moderate virtual, hybrid and life project team meetings as well as to present and moderate plenary sessions etc. in bigger project events.

9 Peer-to-peer counselling

i.e. ability to counsel and help other team member with specific project tasks, or rather to provide counselling and advice on a peer-to-peer level in a cross-border and multilateral context.

10 |Conflict resolution

i.e. to successfully navigate in internal and external conflicts and challenging situations and mediate between different points of view, and ability to take the final decision, securing the conflict resolutions.



EPM Competence Triangle - Business and strategic competences

The **strategic and business management competences** refer to the ability to execute the projects accordingly to the strategy of the organisation and with expertise to act in the area of activity.

1 Insight into the CSOs reality

i.e. ability to insight into the missions, needs, challenges, conditions, legal situation, and history of the CSOs sector of non-formal and informal adult education/lifelong learning in your own country and the wider European community; ability to act in a CSO environment.

2 Insight into the situation in the involved partner countries

i.e. ability to some basic insight into the history and current challenges as well as of the CSO field in the involved partner countries.

3 Intercultural competences

i.e. the ability to work in international context, with the needed intercultural competences and basic understanding of and skills to behave in different cultural and social contexts.

International and multilateral network in the CSO field

i.e. ability to build and develop a strong European network in the CSO sector and ability to find and select appropriate new partners, as well as to promote your own organisation as an attractive, future project partner.

Applying to European funding programmes

i.e. ability to overview the relevant funding programmes and an the specific demands these programmes have for the project plan and the specific application design; ability to apply to the programmes.

6 Needs (and stakeholder) analysis

i.e. ability to name the challenges and analyse the needs of the stakeholders being the basis for the project idea; ability to clarify the means to meet the needs and to involve the key stakeholders in the project plan.

7 SWOT and Risk analysis

i.e. ability to clarify the Strengths, Weaknesses, Opportunities and Threats for the project plan; ability to name the obvious risks, their probability and impact, and plan how to handle them.

8 Legal and regulatory compliance

i.e. ability to ensure that the project complies with relevant European laws, policies, and regulation as well as that the tools for communication of the project are applied within the legal framework.

9 PR and Marketing compliance

i.e. ability to apply the tools and contact channels for information, promotion, and dissemination of the project to the main, relevant target groups.

Synergies between national CSO projects and international CSO projects

i.e. ability to see and use possible synergies by initiating parallel international and national projects with overlapping activities and outputs and supplementing funding possibilities.







Which of the competences do you need most at the project planning and designing stage – and why?

The project planning and designing stage, and the project implementation stage are very closely related. The better you plan and design the project, the easier the implementation will be. Not to mention that well planned and well-designed projects are more probable to get the co-financing for the realization.

The project submitted in the form of an application form for the specific call for proposals constitutes a ready "prescription":

- It includes information on why you realize the project
- For whom
- What are the expected results
- What activities to implement
- Within which timeframe and budget and with whom.

What is more, the prescription for the project management is included.









Which of the competences do you need most at the project planning and designing stage – and why?

Because of this interrelation, both as the project designer and the project manager, you would somehow need all the 30 competences – still on different levels.

Another important aspect is if you are designing the project as the project leader or the project partner. Here – the project lead-designer would need higher level of all the competences than the project co-designer.

The below mentioned, indicative chart may picture more clearly which competences are most needed and where.

Still, please treat it as a simplification; the most optimal range of competences may look differently for various organisations – and various projects, depending on the way the work is being organized.



| Planning & designing | Implementing, monitoring & evaluating | Both |
|--|--|---|
| The | Technical Competenc | es |
| General fund-raising skills | Coordinating the teamwork | English language skills |
| Organising and running Idea Workshops, | Financial management, | Dissemination strategy planning and realizing |
| Project planning and scheduling, | Internal communication, | Evaluation strategy planning and realizing |
| <u> </u> | | |

Budgeting and cost estimation







Which of the competences do you need most at the project planning and designing stage – and why?

| Planning & designing | Implementing, monitoring & evaluating | Both | Planning & designing | Implementing, monitoring & evaluating | Both | |
|----------------------|--|---|---|---------------------------------------|--|--|
| The | Leadership Compete | nces | The Board | | | |
| | Motivation and influencing, | Communication in the European CSO context | i ne Busi | iness and Strategic C | ompetences | |
| | Empathy and Situational Understanding | | Applying to European funding programmes | PR and Marketing compliance | Insight into the CSOs reality | |
| | Team Building including volunteers | | Needs (and stakeholder) analysis | | Insight into the situation in the involved partner countries | |
| | Improvisation and agility | | SWOT and Risk analysis | | Intercultural competences | |
| | Motivation by good exemplary practice | | | | International and multilateral network in | |
| | Delegating project tasks | | | | the CSO field | |
| | Moderating meetings and events | | | | Legal and regulatory compliance | |
| | Peer-to-peer counselling | | | | Synergies between national CSO projects | |
| | Conflict resolution | | | | and international CSO projects | |



for proposals.





In each European project, both bilateral and multilateral, there is only one project leader (coordinator). Most often, the project leader role starts with the lead role at planning and designing the project, and when the project gets cofunding – is continued by leading (coordinating) the project implementation.

Here is the general characteristic of the main responsibilities for both roles.

Undersigns the letter of intent/the mandate.

| | 2 | The European project leader | The European project partner | | The European project leader | The European project partner |
|--|--|---|---|--|--|--|
| | Planning and designing the project | Designs the project concept. | Receive and consults the project concept. | | Undersigns the grant agreement; receives the co-financing. Proposes the partnership agreement. | Consults and undersigns the partnership agreement. |
| | | Chooses the co-financing source/the grant. | Checks if the project idea fits to the represented organisation's strategy/aims | Coordinating, monitoring and evaluating the project | Manages the project. Manages the project management committee. | Coordinates the agreed stage(s) of the project implementation; realises the entrusted tasks; |
| | | Searches for, chooses and invites the project partners. | Accepts/Rejects the invitation to the partnership. | 1.0 | | Participates in the project management committee. |
| | | Leads the project development stage | Participates in the project development stage; supports the development of the project application. | | Develops and submits the final report. | Prepares and shares information needed for the final reporting. |





they work for.





When, where and how can you upgrade European project management competences?

The training offer and self-directed learning options available on the EU level

Based on varied experiences and various career paths of the authors of this Toolkit - here are some summary tips on how – and where – to get your first experiences:

1) Get a better picture and understanding of what the European Project Manager job is about:

Talk with the persons who work as European project managers.

Have a look at the answers to the most frequently asked questions concerning international projects and cooperation.

Read this Toolkit and make the assignments.

- Take part in the FIRST Network events. You can find information about the upcoming events.
- Have a look at the European research results (2020) concerning: successes and challenges in European projects management and key competences important for the successful international projects managers and the needs for support they would expect from the management of the CSOs

2) Start taking part in the European projects – as a participant.

There are multiple opportunities, especially for the persons under 30, to take part in European projects: volunteering, studying, internships, trainings and courses, youth exchanges – it is all open for you. What is more, in most cases, you can get some financial support from the European Programmes to participate. There is a European network providing free of charge information about all those opportunities, the Eurodesk.

Working/volunteering in the educational sector, beginning from the kindergarten, through primary education, secondary education, vocational education, higher education, and lifelong learning – you have the opportunity to take part in job-shadowing/training courses in other European countries.

This possibility is offered for the educational entities and their staff/volunteers within the Erasmus Plus Programme of the European Union, Key Action 1.







The training offer and self-directed learning options available on the EU level

Based on varied experiences and various career paths of the authors of this Toolkit - here are some summary tips on how – and where – to get your first experiences:

3) Start working at the European projects' realisation:

Start cooperating with an organisation/entity realising European cooperation – as a worker/coworker/expert/volunteer. While already there, ask to get enrolled in an European project as a project team member/expert.

Learn by doing. Take advantage of peer-to-peer counselling, mentoring, e-mentoring, coaching... anything the organisation you work for offers.

Represent the organisation at the events of the network(s) it is a member of/encourage the organisation you work for to join an European network.

Search for courses and trainings – both on-site and online. Participate in information meetings and matchmaking events/seminars organised by the grant programme operators.

4) Manage your first European project.

Continue learning.

Build your own networks.

Consider confirm your project management competences by any of the recognized certification schemes.

Have a creative an open approach to learning.
There is no just one, common for all, career path in this field.
Take your time. Enjoy. Keep learning.









Becoming a member of an European network (or several networks) brings many benefits, among others:

- Access to experts, information, knowledge;
- Opportunities to find new project partners;
- Opportunity to exchange experiences, introducing new ideas, getting to know new people reaching to new target groups and audiences;
- Opportunity to join forces to achieve higher impacts and results by the activities carried out:
- Support at dissemination activities, providing services, promoting project results;
- Sharing of good practices and know-how in different sectors;
- Mutual assistance, receiving support and increased impact of the activities undertaken;
- Working jointly on the common interests; safeguarding common interests, strengthening the understanding of the importance of the activities and many more.







The Toolkit you are reading now was developed by the FIRST Network members.

The **FIRST Network** is an European network of civil society organizations operating in the area of lifelong learning. The FIRST Network is the answer to the needs to access to specialists and experts in the international cooperation field to receive guidelines on how to solve specific problems, address challenges.

The acronym FIRST is for: First International Realisation Support Team Network.

The Mission of the FIRST Network is strengthening the capacity of civil society organizations and entities active in the adult education sector to operate in the international arena, enhancing innovativeness and the ability to adapt to changes in the modern world. The basic terms of operation of the FIRST Network are described in the Memorandum of Understanding Founding the FIRST Network.







The FIRST Network's activities include:

- a) Exchange of experiences.
- b) Organization of symposia, meetings and lectures, workshops with theoreticians and practitioners.
- c) Organisation and promotion of multilingual events and issuing publications.
- d) Creation and supporting website(s)/ internet portal(s) dedicated to the intensification of international cooperation.

- e) Transfer of knowledge between the members, in various forms.
- f) Cooperation with educational institutions and civil society organizations active in the liberal adult education sector from across Europe.
- g) Cooperation with policymakers and other stakeholders.

The **FIRST Network** is open for new members that can become the civil society organisations and entities active in the field of liberal adult education/lifelong learning. If interested in being the Member, please have a look here.







• Here are some exemplary recognition and validation schemes of the general competences in the field of project management, certifying the project management competences:







PMI Certifications

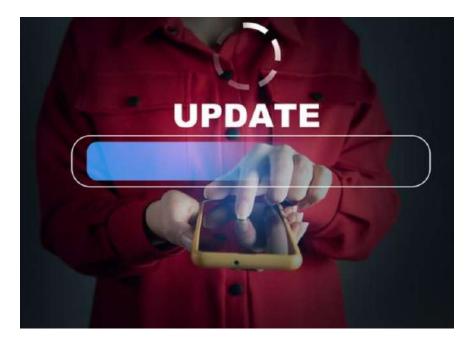
PRINCE2® Project
Management Certifications

The PM² certification









You have reached the end of the chapter 5.

To conclude, please feel now invited to develop your own **SMART Personal Competence Development Plan**.

We believe it would help you to plan the process of upgrading your competences in the field of European project management.







- 1. I am aware which competences I already have (and on what level).
- 2. I am aware which competences do I need to upgrade first.
- 3. I am aware why/what for do I need to upgrade the abovementioned competences.
- 4. I want to/ I decide to upgrade the abovementioned competences (starting from now... •).
- 5. I have developed a SMART plan for upgrading the competences

Yes No

Yes O No O

Yes O No O

Yes No O

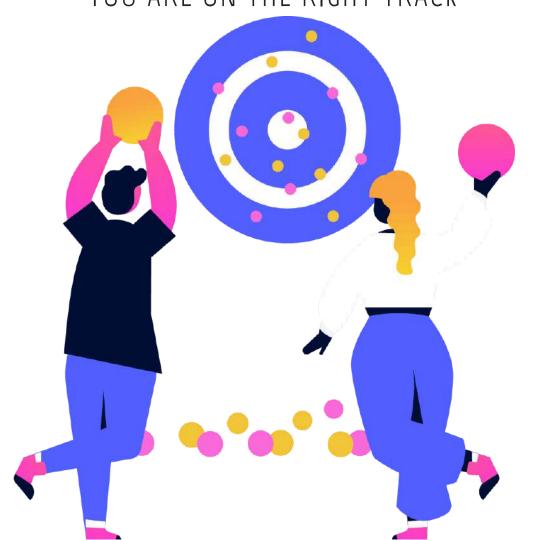
Yes O No O

ONCE AGAIN?

If you have answered moe 'NOs" then "YESes" – it may be worth to read the chapter again.



AMAZING YOU ARE ON THE RIGHT TRACK









1. MY ASSESSMENT OF MY PRIOR LEARNING in the field of European project management

you may take the triangle as the inspiration, but you may also use your own words...

| The technical competences related to European project management I already have | Where and how did I acquire those competences? | My competence level: 0 - no competence yet 1 - basic 2 - intermediate 3 - advanced 4 - expert | Notes |
|---|--|---|-------|
| | | | |
| | | | |
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| | | | |
| | | | |









1. MY ASSESSMENT OF MY PRIOR LEARNING in the field of European project management

you may take the triangle as the inspiration, but you may also use your own words...

| The leadership competences | Where and how did I acquire those competences? | My competence level: | Notes |
|-----------------------------|--|-----------------------|-------|
| related to European project | | 0 – no competence yet | |
| management I already have | | 1 – basic | |
| | | 2 – intermediate | |
| | | 3 – advanced | |
| | | 4 – expert | |









1. MY ASSESSMENT OF MY PRIOR LEARNING in the field of European project management

you may take the triangle as the inspiration, but you may also use your own words...

| The business and strategic competences related to European project management I already have | Where and how did I acquire those competences? | My competence level: 0 – no competence yet 1 – basic 2 – intermediate 3 – advanced | Notes |
|---|--|--|-------|
| | | 4 – expert | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |









2. THE 3/5 COMPETENCES I NEED TO UPGRADE ON THE FIRST PLACE

Technical competences

| Technical Competences Choose the 1-3 technical competences you need to develop/upgrade most in order to better manage European projects. | | |
|---|--|--|
| The | technical competences refer to the ability to plan and execute the project. | |
| 1 | English language skills, ² i.e. high level of reading, writing and speaking English as the common foreign language in European cooperation, incl. knowledge of and ability to properly apply the terminology related to adult education/lifelong learning, to the civil society organisations context and the European projects' calls and management. | |
| 2 | General fund-raising skills, i.e., ability to: design and express a project idea in a structured manner answering clearly named needs; choose a proper co-funding programme; find, chose and engage co-applicants; plan and agree with co-applicants on the disposition of the key project tasks and responsibilities, according to the involved partners expertise, concluded in designing and submitting a project application to a specific call for proposals. | |
| 3 | Organising and running Idea Workshops, i.e. ability to execute some brainstorming sessions, where engaged stakeholders elaborate and qualify the preliminary project ideas or design solutions to identified needs and challenges. | |











2. THE 3/5 COMPETENCES I NEED TO UPGRADE ON THE FIRST PLACE

| 4 | Project planning and scheduling, i.e., ability to: plan the break down structure of the work programme according to clearly defined goals set as SMART (Specific / Measurable / Achievable / Realistic / Timely defined); plan the key activities and outputs; estimate the time needed for implementing each task. | |
|---|--|--|
| 5 | Budgeting and cost estimation, i.e. ability to estimate and assign relevant costs for each task and output; designing the corresponding budget structure and budget plan in a way making it possible to monitor the execution of the budget while implementing the project. | |
| 6 | Coordinating the teamwork, i.e., ability to coordinate the work plan execution with clear procedures for controlling, if the activities are provided on time, with the needed quality and within the budget (incl. efficient monitoring and risk management), with the needed flexibility. | |
| 7 | Financial management, i.e. ability to manage the budget spending, accounting, internal control and financial reporting in accordance with the project plan, the organization financial rules and the specific grant rules. | |
| 8 | Internal communication, i.e. ability to plan and implement an effective, assertive and motivating communication with the project team that defines What, Why, Who, Where, When and How, incl. mastering appropriate ICT tools. | |









2. THE 3/5 COMPETENCES I NEED TO UPGRADE ON THE FIRST PLACE

Leadership Competences

| | Leadership Competences Choose the 1-3 leadership competences you need to develop/upgrade most in order to better manage European projects. | | |
|---|--|--|--|
| | leadership competences refer to the ability to handle the various stakeholders in the project, especially to build team spirit, present ons for your team members and inspire them to achieve the objectives of the project. | | |
| 1 | Communication in the European CSQ context, i.e., ability to communicate the project vision and meaning of the activities and results to the stakeholders in an European civil society context. | | |
| 2 | Motivation and influencing, i.e., ability to demonstrate the needed empathy to understand and motivate the project team and key stakeholders with clear goals and empower them to put their mark on the work, which reinforces the cohesion and co-ownership of the project. | | |
| 3 | Empathy and Situational Understanding, i.e., ability to engage in free human relationships, ability to understand and meet the needs of the project participants and ability to bringing the strengths of the participants into play. | | |









| 4 | Team Building including volunteers, i.e. ability to promote ownership in the project team and related volunteers and promote constructive, collaborative work - culture with a strong mutual responsibility and motivation. | |
|---|---|--|
| 5 | Improvisation and agility, i.e. ability act agile when needed and to improvise in unforeseen situations to ensure progress and effect by following openings, possibilities and the flow of the context. | |
| 6 | Motivation by good exemplary practice, i.e. ability to motivate by being a good example by keeping deadlines and focusing on the goals and content, to take responsibility and act in a compassionate, honest and transparent way. | |
| 7 | Delegating project tasks, i.e. as the coordinator, ability to delegate as many tasks as possible to get more time for dealing with the unexpected, and to gain more time to engage the project work as a whole. | |
| 8 | Moderating meetings and events, i.e. ability to moderate virtual, hybrid and life project team meetings as well as to present and moderate plenary sessions etc. in bigger project events. | |







| 9 | Peer-to-peer counselling, i.e. ability to counsel and help other team member with specific project tasks, or rather to provide counselling and advice on an a peer-to-peer level in a cross-border and multilateral context. | |
|---|--|--|
| 10 | Conflict resolution, i.e. to successfully navigate in internal and external conflicts and challenging situations and mediate between different points of view, and ability to take the final decision, securing the conflict resolutions. | |
| Here you may add one more leadership competence (not mentioned above), which you would like to also develop to better manage European projects. | | |
| 11 | | |







2. THE 3/5 COMPETENCES I NEED TO UPGRADE ON THE FIRST PLACE

Business and Strategic Competences

| Business and Strategic Competences Choose the 1-3 business and strategic competences you need to develop/upgrade most in order to better manage European projects. | | | |
|---|--|--|--|
| | The strategic and business management competences refer to the ability to execute the projects accordingly to the strategy of the organisation and with expertise to act in the area of activity. | | |
| 1 | Insight into the CSOs reality, i.e. ability to insight into the missions, needs, challenges, conditions, legal situation and history of the CSOs sector of non-formal and informal adult education/lifelong learning in your own country and the wider European community; ability to act in a CSO environment. | | |
| 2 | Insight into the situation in the involved partner countries, i.e. ability to some basic insight into the history and current challenges as well as of the CSQ field in the involved partner countries. | | |
| 3 | Intercultural competences, i.e. the ability to work in international context, with the needed inter-cultural competences and basic understanding of and skills to behave in different cultural and social contexts. | | |









| 4 | International and multilateral network in the CSO field, i.e., ability to build and develop a strong European network in the CSO sector and ability to find and select appropriate new partners, as well as to promote your own organisation as an attractive, future project partner. | |
|---|--|--|
| 5 | Applying to European funding programmes, i.e. ability to overview the relevant funding programmes and an the specific demands these programmes have for the project plan and the specific application design; ability to apply to the programmes. | |
| 6 | Needs (and stakeholder) analysis, i.e. ability to name the challenges and analyse the needs of the stakeholders being the basis for the project idea; ability to clarify the means to meet the needs and to involve the key stakeholders in the project plan. | |
| 7 | SWOT and Risk analysis, i.e., ability to clarify the Strengths, Weaknesses, Opportunities and Threats for the project plan; ability to name the obvious risks, their probability and impact, and plan how to handle them. | |









| 8 | Legal and regulatory compliance, i.e., ability to ensure that the project complies with relevant European laws, policies, and regulation as well as that the tools for communication of the project are applied within the legal framework. | |
|----|---|--|
| 9 | PR and Marketing compliance, i.e., ability to apply the tools and contact channels for information, promotion, and dissemination of the project to the main, relevant target groups. | |
| 10 | Synergies between national CSO projects and international CSO projects, i.e., ability to see and use possible synergies by initiating parallel international and national projects with overlapping activities and outputs and supplementing funding possibilities. | |
| | e you may add one more business/strategic competence (not mentioned above), which you would like to also develop to better manage opean projects. | |
| 11 | | |







3. MY COMPETENCE UPGRADING PLAN

| WHICH COMPETENCE? | HOW MUCH TO | HOW (for ex. Self- | WHEN? | WHERE (for ex. Online/ | MEASUREMENT = how |
|-------------------|------------------|--------------------------|----------------|------------------------|------------------------|
| | UPGRADE? | learning, taking part in | (dates/months) | via e-learning | will I check/prove the |
| | 1 – basic | a course/training; | | platform/at the course | competence upgrade? |
| | 2 – intermediate | finding a | | in)? | |
| | 3 – advanced | coach/mentor, etc.? | | | |
| | 4 - expert | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

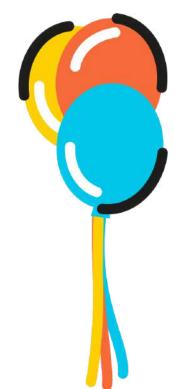
SMART = Specific - Measurable - Achievable - Relevant - Timely











Congratulations!

You've finished reading the toolkit 1!!







| Activity or action | Part of the work to be done during the project. It is characterized by duration, cost, and set of resources. |
|--------------------|--|
| Applicant | Any participating organisation or informal group of young people who submits an application for a grant. Applicants can apply individually or on behalf of other organisations involved in the project. In the latter case, the applicant is also defined as a coordinator. |
| Ronoficiary | When a project is approved for an Erasmus+ grant, the applicant organisation becomes a beneficiary by signing a contract with the National Agency or Executive Agency that selected the project. If the application was made on behalf of other participating partners may become co-beneficiaries of the grant. |
| | Invitation published by or on behalf of the European Commission to present, within a given deadline, a proposal for action that corresponds to the objectives pursued and meets the required conditions. |
| | A civil society organization (CSO) is any non-profit, voluntary citizens' group which is organized on a local, national, or international level. |
| Dissemination | Dissemination of the results obtained from carrying out the project. |
| | It is a technical tool of project management providing a graphical illustration of the timeline of the workplan. |



Glossary





| ID or OID | The Organisation ID (OID) uniquely identifies your organisation among all the organisations participating in the Erasmus+ and European Solidarity Corps actions managed by the National Agencies. You can use your organisation's OID when you request an accreditation or grant under the Erasmus+ and European Solidarity Corps actions managed by Solidarity Corps actions managed by the national agencies. |
|------------------|---|
| Indicators | Qualitative or numerical descriptors used to measure the achievement of results. |
| Milestones | They are activities, without duration, used to define the main verification moments in the project running. They can coincide with presentation meetings, sending reports, events, etc. |
| Nacional Agency | One or more organisations responsible for managing the implementation of the Programme at national level, in a Member State or in a third country associated to the Programme. In each country there may be one or more national agencies. |
| Objectives | They can be general and specific and represent the purpose of the project, what we are pursuing. |
| Outcomes | Are the effects generated by the project. |
| Output / Results | It represents what the project produces in concrete terms. It's a tangible service or product carried out by the project. |







| Prior learning | Prior learning means knowledge, skills, or competencies acquired through formal or informal education outside the traditional postsecondary academic environment. |
|----------------------------------|---|
| Project application form (eForm) | Scheme, in paper or digital support, to be filled in to participate in a call for proposal, generally composed of database of the proposer, description of the project, financial plan, GANNT and eventual Annexes. |
| Project leader | A project leader is a professional who leads people and makes sure a project is carried through. |
| Project partner | Project partner is used to refer to a partner that is not a lead partner but is part of the consortium. |
| Risk analysis | Analysis or estimation of factors that influence or could influence the achievement of the objectives of a project intervention. |
| Risks handling | It refers to the management of potential events or circumstances outside the project team's control that will have an adverse impact on the project. |
| Self-assessment Competence | Is an employee-driven activity that allows individuals reflect on how their competencies-knowledge, skills, and abilities-match up with the requirements of a specific job or a core set of organizational competence. |
| Self-development plan | Reflects your strengths, weaknesses, and goals. The aim is to identify skills for personal improvement then set clear goals for each. Ideally, they should be time bound, short term goals that you can measure. |
| Stakeholders | All the persons/entities who/that may be influenced by the project and whom/that the project may influence. In such a broad meaning, the stakeholders group will involve, among others: the staff of the organisation, the clients/beneficiaries of the organisation, the co-funding body, the cooperating organisations/institutions, the relevant media, the relevant decision makers, etc. |
| Task | It's a micro-activity to accomplish in a project, a single step within the WP. A task is linked with a deadline and must contribute toward work-related objectives. |
| Work Package (WP) | A Work package is a set of one or more activities and their respective characteristics. |
| | • |





CHAPTER 3:

- 1. Please register your organization on this website! If you do not have EPALE account, please prepare it!
- 2. If you are ready with your registration, please prepare your partner finding announcement!
- 3. If you are ready with your partner finding announcement, you can search among others' partner finding announcement.

CHAPTER 4

3



CHAPTER 5

The 1stTIPPM resources ("First-time international projects realisers support network"):

- a) "Successes and challenges. Report I on international project management in the civil society sector of adult education".
- b) "Key competences and needs for support. Report II on international project management in the civil society sector of adult education".
- c) "Guidelines and scenario for implementation mentoring and e-mentoring systems supporting international cooperation initiation and developing in the 3rd sector adult learning organisations".
- o d) The relevant FAQs at the FIRST Network Portal.
- e) Recommendations for the validation and recognition system for the European project managers working in civil society organisations developed within the AER-V.







MINI-INTERVIEWS & REFLECTIONS FOR THE TOOLKIT

The aim of those short reflections is to show the variety of the European projects, variety of the topics.



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