Mythbusting:
European Project Management in Transnational Partnership Projects

A Handbook for European Project Managers by European Project Managers
March 2020

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Introduction

Managing projects at a European level is unique because of its transnational nature. It was with this in mind that the Irish National Agency Léargas and the Icelandic National Agency Rannis decided to hold a 2-day Transnational Cooperation Activity (TCA) on the theme of European Project Management in Dublin. This involved bringing together both new and experienced European project coordinators to explore challenges, share successful factors, and share tools/approaches that enable them to work effectively in this way.

There are many books written on the topic of project management and we did not want to create another one. Our aim was to learn from those with real experience of managing European Projects, and so the content of this handbook is drawn from their discussions and inputs at the TCA workshops and plenaries. It is a handbook that has been created *by* European Project Managers *for* European Project Managers.

This is not intended to be a complete work but rather one to be drawn on as a practical support. We hope to add to this document and see it evolve as we continue to learn from our beneficiaries about new approaches and good practices in European Project Management.

The most significant finding of this two-day harvesting exercise was the central importance of communication and relationship building to successfully manage a European project.

This handbook is divided into four themes:

- Building a Transnational Team
- Project Managing a Transnational Team
- Embedding Quality Management in your Transnational Project
- Developing Transnational Project Outcomes.

Acknowledgements

Firstly, we want to thank the participants of this TCA for their energy and generosity at the event. Over two days they shared their wisdom, experience, approaches, tools and-most importantly-their enthusiasm for cooperating through European projects. We hope that we have captured this effectively, in a way that can be shared and used by current and future European project coordinators and partners.

We want to thank Paul Guest (Orientra Consulting) who facilitated the overall event; Margrét Sverrisdóttir and Margrét Jóhannsdóttir from the Icelandic National Agency, Rannis, who partnered with us on this event; and the workshop facilitators Nora Furlong, Siobhán Wallace, Petar Dukic and Denise Shannon.

Finally, we would like to thank Ivanna D'Arcy who carefully captured and compiled the outcomes of this dynamic event to write this handbook.

Building a Transnational Project Team

From Application to Implementation

Building a project team is multi-faceted and key to any successful project. A point of note is the evolving nature of communication between the partners from application stage to approval and implementation. At application stage with a short-term goal of completing the application form (normally overseen by the coordinator), communication is direct and effective and has a common goal. Partners are communicating about their experience, their work and their expertise related to the topic of the project and project implementation. They are entirely within their comfort zone. This phase involves the direct exchange of information, limited decision making and clearly defined requests.

The transnational consortium members are still trying to find their place within the group and carve out a clear role for themselves within the partnership application. These are reflected in the strengths identified by the participants, which play a key role in completing an application form and gathering information. The transnational consortium members are presenting the best version of themselves by responding quickly and efficiently. At application stage, communication is primarily internal and confined to project team members. Managing the move from application stage to approval stage is a difficult process, when a short-term goal turns into a longer-term objective, and the aims and goals become a reality.

> **Relationship Building is key to any project and to the development of viable successful outcomes and their future sustainability. This impacts on all areas of project management and forms a continuous transversal theme.**

Understanding Team Dynamics

Once a project is approved there is a focus on completing tasks in order to achieve the project objectives. It is important to create a high-performing and cohesive team and consciously consider team dynamics at all stages of the project. This is significant when there is a change in team members in a partner. Recognise who is on your team and remember - all members have their strengths, experiences, knowledge and skills at varying levels.

These traits should be acknowledged to pre-empt any difficulties that may arise during the project. This mitigates features of poor group dynamics such as conflict and contributes to effective listening, mutual trust, the valuing of experiences, enhanced engagement and motivation of the team for successful project outcomes.

Tips!

➢ Consider the project management structure carefully and reflect on the decision-making processes, ensuring that there is space for all voices to be heard, as the structure will impact on the behaviour and function of the team.

➢ Develop self-awareness and inclusive leadership approaches by recognising any unconscious bias and assumptions that you may hold about others. Recognise the unique qualities each team member brings to the consortium and acknowledge all contributions. The feeling of belonging to the consortium is key to successful project outcomes.

➢ Refer to the **Project Charter** as well as objectives of the project so team members are aware of the importance of their contribution. This helps retain motivation, enabling them to buy in to the process.

➢ All team members should be aware of their own norms. For example, some people answer emails quickly, others do not; some prefer to talk using Skype, others prefer to email. Develop clarity around expectations and what is considered good practice.

➢ Create a common language and a common understanding around terms used within the project e.g. by creating a **Project Glossary.**

➢ Develop a culture of trust by:
- o Creating positive relationships through remaining aware of the needs of the team members
- o Resolving conflict and providing open feedback
- o Demonstrating good judgement by listening to the opinions and ideas of team members, and responding to and resolving problems quickly
- o Being consistent in managing project commitments and treatment of team members.

Promoting Intercultural Understanding and Developing an International Mindset

Regardless of the relationship between the team members who are new to the consortium or have previously worked together, it is important for all team members to think in international terms.

While there is a strong focus on their own context and the value of the project, more consideration needs to be given to the European context of the project outcome.

Tips!

➢ Remember that the project topic brought the team together, providing common ground from the outset. Use this as a starting point to explore each other's culture. This will support the understanding of cultures within the context of the project, promote mutual understanding and the identification of collective practices.

➢ Allow space for team members to share their methods and approaches to different aspects of the project as some may be culturally specific. Remember the same approach may not work in all countries. It is important to allow for a range of approaches.

➢ Focusing only on the technical aspects and ignoring cultural aspects can lead to difficulties in communication. It can also lead to a lack of understanding of team members and target groups within a partner country, as well as impacting the overall quality of the project output.

➢ The development of **Partnership Agreements** can contribute to intercultural understanding and develop cross-cultural effectiveness, as they provide a sense of security within the project partnership.

➢ It is important to keep in mind that while a team member may be working in a consortium member country, they may not be a native of this country. Therefore each consortium team member should be provided with the opportunity to share their cultural perspectives if they wish to.

➢ Develop a clear communication plan and evaluate the risks of cross-cultural misunderstanding when selecting methods of communication.

➢ Define target groups and set parameters for each group to guarantee that all partners consult, engage and interact with the main beneficiaries.

➢ Develop a culture of openness, trust and inclusivity focusing on the aims and objectives of the project, as well as building good personal relationships. Within the project activities, allow for social time among the partners: for example, organise a group outing or group dinner. Build these into the overall project plan at the start of the project, so team members have an opportunity to showcase and share their culture.

Exploring a Values-Based Approach

An area given high attention within the TCA was the values-based approach to gain buy-in, maintain motivation and identify a common cause among the partners. This can also apply to stakeholders involvement. When developing project management approaches, it is important to create a space among the partners to reflect on their own values, as values shape our actions and impact our viewpoints. For example, a partner who has experienced civil unrest will have a different viewpoint on topics to a partner who has not. Values should be examined at various levels: personal values; values of the organisation; values of the project; and values of Erasmus+. Promoting the group values can have a knock-on effect into other areas, creating an openness to change and the ability to shrink values around authority, social power and wealth. This helps create a more inclusive project approach and helps develop inclusive results.

Values can be used to:
- ❑ Motivate people
- ❑ Identify common goals
- ❑ Assist with the distribution of power
- ❑ Highlight the importance of leadership
- ❑ Show respect for people
- ❑ Maintain a cohesive partnership
- ❑ Consider the public image of the project
- ❑ Think about greater impact
- ❑ Highlight awareness and sensitivity of other people's values, increasing the effectiveness of the project

"Being aware of the values others hold makes you more effective and means you can adapt your approach'"

"When we broke our values down there was a focus on tolerance. We value the welfare of people and mutual respect of one another. The management of relationships and the partnership are important for a successful project."

People

Ethics

Innovation

Respect

Teamwork
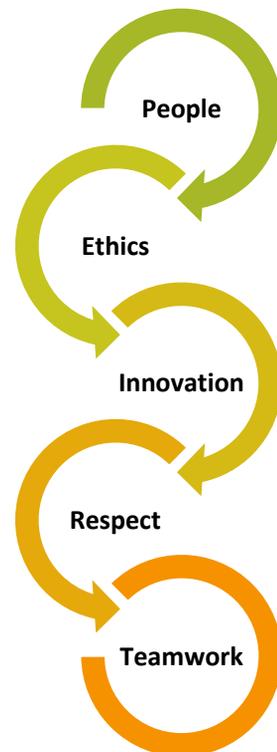
Developing Communication Tools

Communication mechanisms are outlined within the proposal and form part of the evaluation criteria contributing to the quality of project management. The project managers noted a range of project supports which could contribute to effective and efficient communication, removing barriers and creating a clear understanding of the common aims and objectives of the project.

Tips!

Selecting and Evaluating Communication Mechanisms

➢ Consider the current tools you use and identify what gap they are not filling and what solution could address this gap.

➢ List all the tools being used for different aspects of communication and consider if any of these are replicating each other; if so, are both needed?

➢ Email may be effective for one-to-one communication, but with the overload of emails people receive daily - can you ensure that all members of the team will read them? It may be advisable to use a discussion board instead, which keeps track of all project-related conversations.

➢ When planning virtual meetings, consider if presentations will need to be shared in advance and be aware of the timing. Look at the calendar of national holidays and time zones. For example, January 6 could suit the Irish partner but not the Spanish Partner; a start time of 08.00 CET may suit most partners before work but not the Lithuanian or Greek Partner due to the time difference.

➢ Ask: who will use the communication tool? Do they have the knowledge or will they require training and access to the tool?

➢ Don't start a project using a tool that you have not tried, tested and are fully competent to use; make sure it is fit for purpose.

➢ Check with stakeholders regularly to see what is working well and what could be improved in communications.

➢ Consider cultural diversity and language skills and cultural aspects, such as direct and indirect approaches to communicating. Remember that when people do not ask questions it does not mean that everyone understood or was listening.

➢ Be careful with tools which have been developed by third parties unless they have been approved and validated by the EU Commission, particularly those seeking fees to use their services.

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Developing a Team Charter

Not all projects develop a team charter. Those who have developed one, however, found it to be a motivating element for team members to create a sense of belonging and direction within the team. It further clarifies understanding of the project and should be developed before or at the same time as the project charter. A charter can act as a project team mission statement and be presented on one page to hang in offices, or within the partner organisations for other colleagues to see. Some team charters include the target groups they are working with, and distribute a framed one-page charter to them, gaining further commitment and a sense of belonging within the overall project.

Keep in mind the purpose of the project by developing a project charter at the first transnational project meeting and a team charter in parallel. This helps to set collaborative learning goals, and allows the recognition of team members strengths and experiences. It also shows how the team can benefit from each other's knowledge and skills.

Checklist ✓   Developing a Team Charter

- ❑ The purpose of the team and the aims of working together
- ❑ Names of team members
- ❑ Project duration
- ❑ Parameters and boundaries of the project team
- ❑ Team values
- ❑ Expected outcomes
- ❑ Support available for the duration of the project

Creating a Communication Plan

All applications outline a Communication Plan covering external and internal project stakeholders, and outlining mechanisms for dissemination. Nevertheless, participants found that what works in one project may not work in another or in practice. The Communication Plan outlined in the application primarily focuses on the intended frequency and mechanisms, with little consideration given to the impact of virtual communication on intercultural understanding. A key aspect, that is often left unconsidered, is the fact that most of the communication between the team remains in the virtual domain, and intercultural understanding is not considered. The Communication Plan should be developed after the Team Charter and in tandem with the refining of the project Gantt Chart. The Communication Plan sets guidelines on **how, when, what** and **where** information will be shared and who is responsible.

Communication planning should focus on at least five different stakeholders.

1. The **transnational consortium members,** in order to achieve the project objectives, provide feedback, increase transparency, set expectations and timelines.
2. Within each **participating organisation** to gain buy-in and commitment from other staff members. While the legal signatory signs the contract and application form, there may not be visibility of the project within the participating organisations outside the team members involved.
3. The **target groups** of the projects, where their input is needed to achieve the objectives and expected outcomes. Consider which relationships need to be developed and what approach would best suit to develop these.
4. **National Stakeholders** and **policy makers** including organisations working with the target groups who could be interested in your project.
5. **European and international stakeholders** outside of the partner countries who may be interested in using your outputs.

European Stakeholders

National Stakeholders

Target Groups

Participating Organisations

Consortium Members

Tips!

Designing a Communication Plan

- The Communication Plan should be clearly aligned with the project aims, objectives, goals and activities.
- It is important to include reporting deadlines and monthly project reports as this will identify any issues at an early stage.
- The plan must consider the needs of all stakeholders as the needs will vary. For example, the needs of European social partners will differ from those of the team. The key message for each type of stakeholder should be considered and the format in which the message will be presented. For example, policy makers would require bite-sized information outlining key messages, whereas directors of the participating organisations may require a full activity report.
- When working with learners, find out if there are any special educational needs within the class or the group.
- Develop a shared document detailing the conversations and meetings project partners have about the project outside the planned communication. Use this document to create a further database of contacts. Ensure that you have permission to circulate and add to the contact details, to comply with data protection regulations.

Weak communication or poorly-chosen mechanisms can cause a project to fail, so it's important to build a relationship with all stakeholders from the outset. This will help build trust among the team and stakeholders, and in turn build faith in the project. If you have not worked with the target groups before, you will immediately need to develop a relationship and reach out to them. Your project cannot be successful or relevant without them.

Engaging Stakeholders

European Project Managers highlight the importance of engaging stakeholders in the project and developing a stakeholder communication plan. It is also important to manage stakeholders and their expectations. Stakeholders should have meaningful involvement in the project, particularly if they are expected to use the project outputs.

Tips!

Ensuring Stakeholder Buy-in

➢ Develop a list of all key stakeholders and outline a role for each grouping. For example, members of a stakeholder advisory group might act as a pilot group for testing outputs.
➢ Assess the impact of the project on each group. List the importance of the stakeholder and their role within the project and how you will keep them informed. Assess the impact of not gaining buy-in into the project, as well as key messages relevant for the group.
➢ Ensure stakeholders are aware of project boundaries and constraints.
➢ Keep stakeholders informed of project progress through regular updates such as project newsletters, quarterly meetings or as external evaluators.

	Poor Communication	Planned Communication
Team	• Conflict and misunderstandings • Lack of direction • Limited productivity	• Accountability • Productivity • Transparency
Stakeholders	• No commitment or buy-in • Lack of understanding • Conflict	• Commitment • Support • Contribution of expertise and value in results

Problem Solving

It is important that all team members are aware of the approach to problem-solving within the partnership and all problems are approached in the same manner. This demonstrates consistency across the consortium.

A suggested approach to problem-solving was to assess the impact on all areas of the project, including all stakeholders, and categorise it as low- or high-risk on the overall project, by mapping out the potential impact for each area of the project. Low-risk problems will have an easy alternative solution and minimal impact. Medium to high-risk problems will negatively impact on several areas and require urgent attention. It's important to discuss potential solutions, keeping what's written in the application form in mind, and inform the National Agency of what mitigating actions the consortium intend to take to ensure compliance with the programme rules.

Solutions should be outlined if a good risk management plan is in place. With a strong Communication Plan, potential large challenges can be rectified at early stages.

Low Risk	Easy solution Minimal impact
High Risk	Requires prompt attention High impact
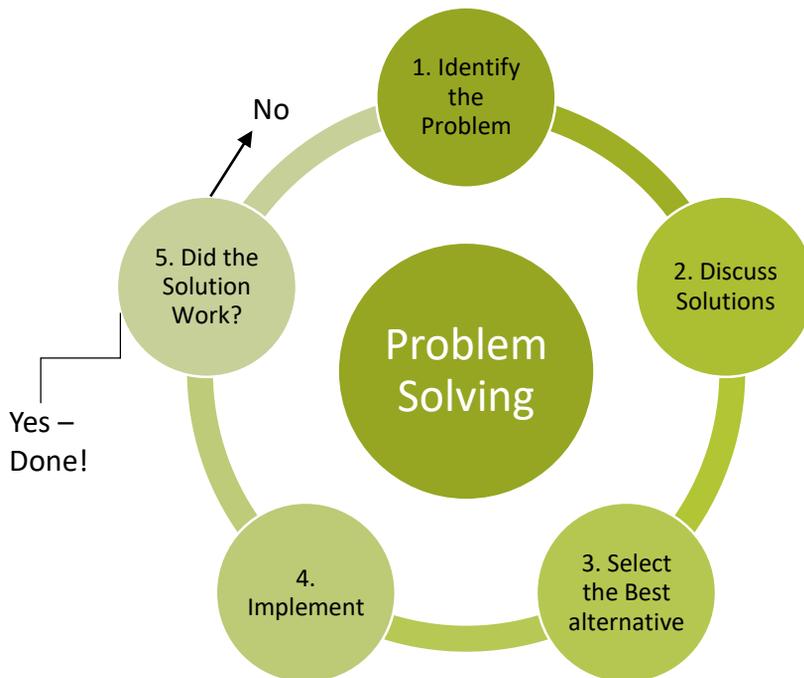
Decision Making

The decision- making process outlined in the application should be further developed. There should be key accountabilities in place. The process should be included in the Team Charter and agreed by all partners.

Project scope, budget and time are the key areas within a project where a misjudged decision can have a significant negative impact on the outcomes of the project. For European projects, the scope should not change as this will impact on the approved application and requires permission of the National Agency. Some partnerships develop an internal project steering committee chaired by a co-ordinator, who assumes shared responsibility for making decision through voting on the most appropriate course of action. If consensus cannot be reached the decision lies with the co-ordinator. While this can be a useful approach, a model for decision making would provide evidence-based support for deciding on a course of action. This will mitigate decision making biases which can cloud judgement.

It is important to gather all facts and relevant information, look for limitations, identify all possible alternatives and select the most appropriate.

Key areas of decision making in an approved project include:

- Refining the allocation of roles and responsibilities
- Managing and developing project tools
- Actions to be taken to achieve the outputs of the project
- Approaches to involving stakeholders
- Reviewing timelines
- Resource allocation

Decisions are divided into three areas within the project and made at different levels:

Strategic: This will impact on the overall project results and outcomes. Decisions in this area will have a long-term impact on the project. These decisions should be made by the **project steering committee** and the **co-ordinator**. They require a clear analysis of the impact of each possible solution. Examples include seeking a reallocation of the budget for intellectual outputs, or increasing stakeholder involvement. The strategic decisions within an approved project should be limited and would generally require consultation with the National Agency, as they are likely to affect the overall approved project.

Tactical: These decisions would generally be made by the **consortium together** through the steering committee and the coordinator. They have a long-term impact on the project and are linked to the implementation of the project plan. For example, they can include ideas on how to involve more stakeholders, motivating stakeholders to participate in project activities, or the timing of project activities. They require the gathering of data and information to ensure the best possible outcome.

Operational: These decisions are made at **consortium or individual partner levels.** They relate to the day-to-day running of the project and include examples such as requiring more answers to surveys, how to attract more participants to multiplier events, selecting a location for events and project activities.

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Decision making models

Decision Matrix Analysis: This allows you consider all the available options through scoring. This can be a useful tool for gaining consensus among a project team removing emotion and bias from the decision-making process. The steps involved are:

➢ Identify a range of possible decision options
➢ Select the criteria which will be impacted by the decision and rank these in order of importance with a weighting score
➢ Calculate the result by multiplying the rating in each cell by the weighting on that row
➢ Once all criteria are scored, the highest scoring option is considered the decision.

Example: A transnational partnership project wanted to develop a training course for teachers, but couldn't agree the format. Using the Decision Matrix Analysis Online Training scored 15 and Face-to-Face training scored 12, so Online Training was chosen.

		Online Training		Face-to-Face Training Course	
Criteria	Weight	Rating	Score	Rating	Score
Cost	1	3	3	1	1
Effectiveness	3	2	6	3	9
Feasibility	2	3	6	1	2
Total			15		12

SWOT Analysis: Another approach to the same problem is to create a SWOT Analysis. **Strengths, Weaknesses, Opportunities and Threats** are examined for each option, which can then be listed as pros and cons of each possible decision.

Strengths
Cost-effective
Can include a wider range of content

Weaknesses
More difficult to gauge effectiveness of training

Opportunities
More widely accessible

Threats
Users lack of IT skills
Lack of motivation for self-directed learning

SWOT analysis of Online Training

Critical Path Analysis is useful when steps in the project are interdependent and important when making decisions in project planning. It looks at the sequence of activities involved to achieve an outcome. It's useful for planning timelines and taking into consideration all steps involved, estimating the time for each step and providing an overall estimation to finalise an activity. Analysis helps identify actions which take place in parallel, and the shortest journey to complete the task, as well as clear planning including all sub-tasks. In decision making it can help identify the impact on timelines and progress within a project, as well as identifying which tasks can be modified. However, it is important to also consider external factors which can impact on the task and sub-tasks, as these are not built into the process.

Example: Critical Path Analysis of a Project (critical path in red)

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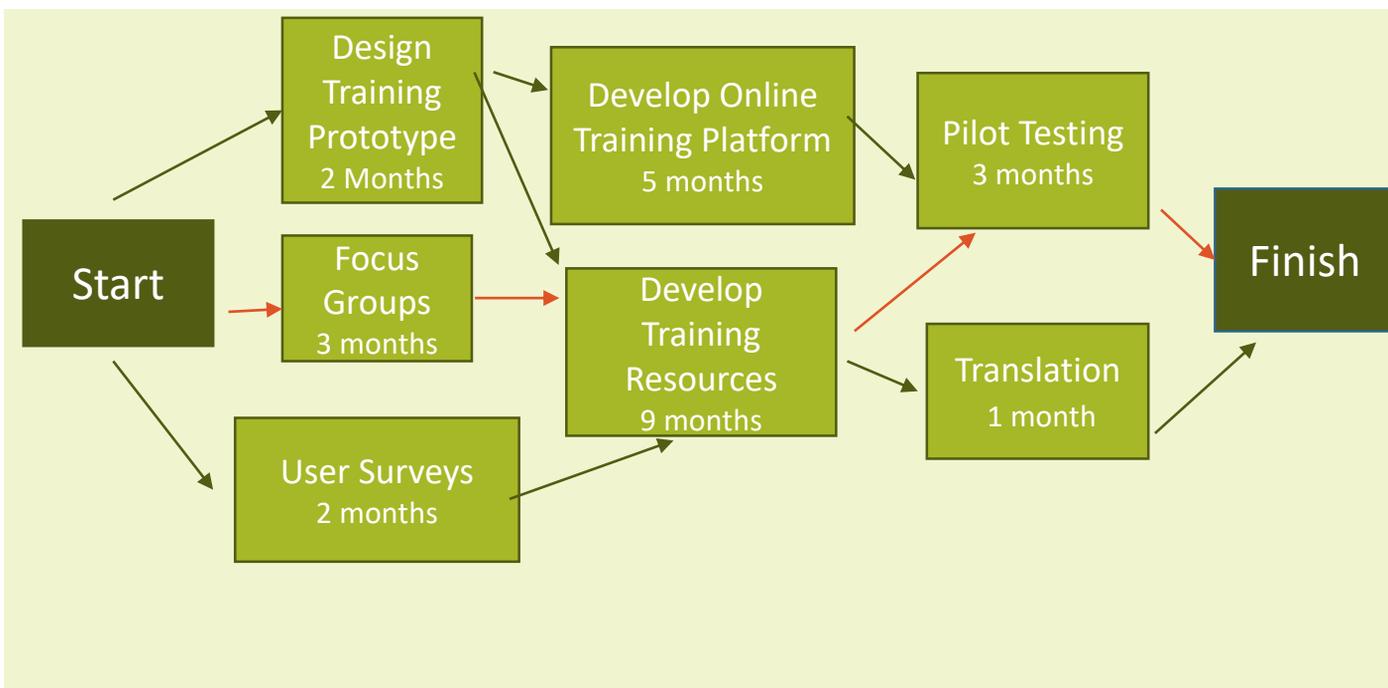
Brainstorming

Many aspects addressed within project management require cooperation and communication within the project consortium. European Project Managers highlighted the importance of brainstorming to ensure all consortium members have input and provided the following insights:

Tips!

➢ Brainstorming needs to be a planned process and works best with a structured, prepared approach
➢ It is important to be able to say 'no' and find a balance between discarding ideas which clearly won't work from the outset rather than spending time trying to develop them

➢ All partners should contribute to brainstorming
➢ To avoid using additional time at project management meetings, try using online brainstorming tools such as mindmap or popplet.com

Brainstorming Process for Transnational Partnerships

Preparation for brainstorming can take place in advance of the main session. The lead for this activity should provide a clear context for the brainstorming idea covering the objectives, aim and goal of the session.

All ideas are noted by the lead and then discussed by the group only after everyone has given their idea. The consortium then discusses and votes for the best ideas.

Each partner conducts a local brainstorming activity and sends their ideas to the brainstorming lead, who will aggregate all ideas.

At the meeting each person in turn provides their idea. If a team member states that someone has already given their idea, they must come up with an alternative. it is important that ideas are not judged until everyone has shared their idea.

Managing Conflict

The risk of conflict can be high within the transnational project consortium for the following reasons:

- The varying cultural backgrounds, values and norms of each individual member of the consortium and the variety of personalities
- Different organisational structures and resources
- Limited time working face-to-face within the same location
- Language skills or lack of a common understanding of key areas of the approved project
- Lack of common goal and values
- Misunderstandings in the interpretation of the approved application form
- Poor project leadership
- Poor performing partner
- Missing deadlines.

It is important to remember that conflict can be external to the project team, which can include:
- Lack of commitment from key stakeholders
- Lack of support from the wider organisation
- Dissatisfaction of stakeholders.

Not all conflict is bad! It can be perceived as an opportunity to:
- **Discuss and validate decisions made**
- **Identify weaknesses within the project**

A common element contributing to conflict is poor communication among the partnership, and the perceived lack of meaningful involvement of a partner within the consortium. Conflict can be minimised through the development of a **stakeholder engagement and communication plan**. The importance of strong communication plans within and outside the consortium are key to mitigating avoidable conflict, however there are times when conflict cannot be avoided. Conflict management is generally outlined within the application form and should be formalised with a clear process to manage conflict. Many of the participants agreed that they were uncomfortable with conflict, and identified the following factors to overcome differences:

Tips!   Avoiding conflict within a Partnership

➢ Draw up partnership contracts and clear agreements
➢ Develop strong effective and efficient communication
➢ Encourage self-reflection before commenting
➢ Help each other in the partnership
➢ Design a balance between work and social activities at transnational project meetings allowing people to get to know each other on a social level
➢ Have a clear project plan with milestones to celebrate
➢ Manage expectations
➢ Do as much work as possible at partner meetings
➢ Empower partners to take responsibility for tasks based on individual competencies
➢ Create a defined work plan with clear tasks and responsibilities
➢ Be honest!

It is important and necessary to address conflict from the outset to avoid escalation which would impact negatively on the consortium. Suggestions for addressing conflict include:

Tips!   Addressing conflict within a Partnership

➢ Arrange a one-to-one meeting to listen and find out the cause or the issue creating conflict
➢ If there are challenges between partners, mediation can be carried out by a neutral member of the consortium
➢ If it is a behavioural issue, the co-ordinator should speak to the person directly
➢ If it's a performance challenge, the project charter and partnership agreements will address this based on agreed facts

Project Managing a Transnational Project Team

What Do We Mean by Project Management?

Project management is the application of methods and tools to achieve the objectives of the project.

This section addresses points to consider when developing these approaches and methods. It explores the importance of a values-based approach when developing a project management methodology, as well as outlining the methods that projects are using. It also outlines tools which can support the management of the project such as project charters, timelines and partnership agreements.

Selecting a Project Management Approach

Participants provided the following advice when selecting a project management approach:

Tips!

- Reflect on previous projects as a consortium and identify what worked and what did not work.
- Remember that this is a transnational team with limited face-to-face contact, therefore think about what will work virtually as well as face-to-face.
- Consider the skills of all team members as well as the resources available within participating organisations.

- There is no one size fits all approach. It is not expected that one named methodology will be used. Elements can be taken from a range of methodologies to meet the goals of the project.
- The approach should be driven by the needs of this project. What worked in one project may not work in another project.

Developing a Project Management Approach

There are a wide range of project management methodologies and frameworks including Agile, Lean, Waterfall, PRINCE2 and Critical Path Method. Many funding applications name methodologies and broadly address these within the proposal, but provide little explicit detail on how they will be implemented for each aspect of the project lifecycle, or how the team will operate within the frameworks. Often, little consideration is given to who will undertake these activities within the named partner organisation.

While fine-tuning the project management approach, the timeline and the allocation of roles should take place in parallel. Elements from all project management frameworks and methodologies can be adapted to suit the needs and requirements of the project. The table below outlines the features of the methodologies and frameworks mentioned by participants, and notes the areas they found which support the implementation of the project, as well as the shortfalls of the methodology or framework.

Methodology/Framework	Features	Advantage	Disadvantage
Agile	Focus on values and on stakeholder feedback, collaboration, moves in iterative and incremental cycles (methods include Scrum and Kanban)	Flexible, focus on collaboration and continuous improvement	Can lead to fragmented outputs and time delays
Lean	Seeks to reduce waste and unnecessary activities through clear planning and cutting out unnecessary activities	Provides clear ways of working with limited resources	Requires quick decision making which can negatively impact on the quality
Waterfall	Follows sequential steps, project must have a clear focus and plan from outset	Easy to use and understand	Little flexibility
PRINCE2 (Projects in Controlled Environments)	Breaks the project into clear stages with a common understanding and a clear process for each stage	Standardised approach to each phase with documentation supporting each activity	Strong impact on time if something changes within the project
Critical Path Method	Tasks are dependent on each other; a clear path is developed to depict the path necessary to complete the project where timelines are then estimated	Resources are mapped and timelines are clear	Everything needs to be planned and underestimating time can have negative impacts

Designing a project management approach is dependent on several factors, with the main point being that no two projects are the same. The following aspects need to be carefully considered when fine-tuning the approach outlined in the approved application:

The scope and type of the outputs	The number of outputs and the interdependency between them	The resources available to the project team	The Input from and collaboration with external stakeholders	The timeframe of the project
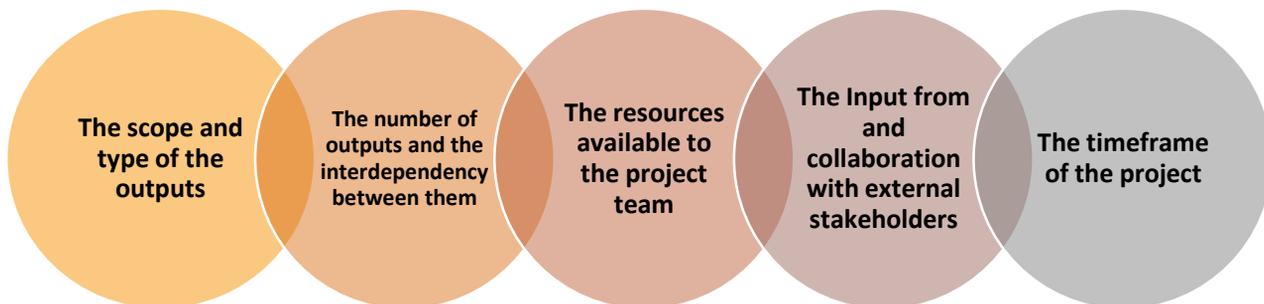
Reaching agreement on the approach involves:
- ✓ Building personal relationships
- ✓ Understanding the strengths and weaknesses of each partner
- ✓ Taking responsibility for leadership of the project
- ✓ Meeting face-to-face prior to submitting the project application
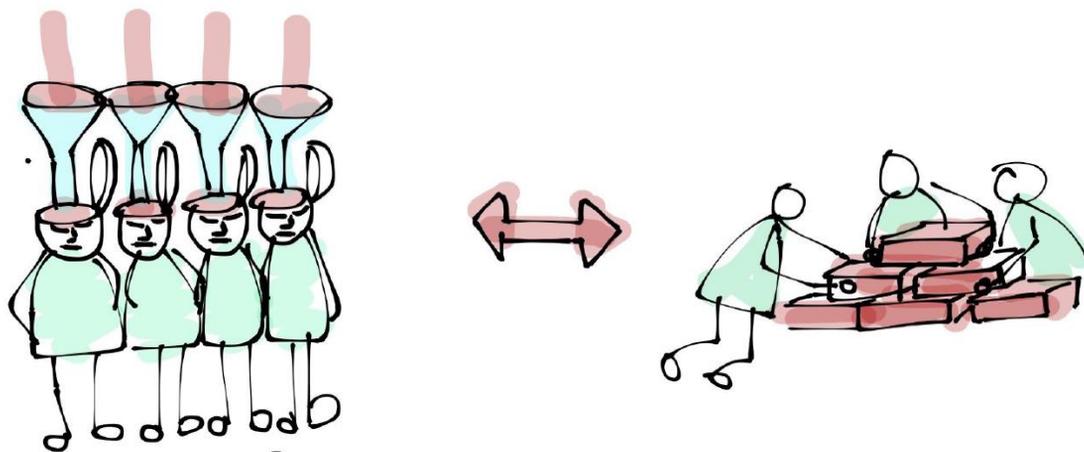
Visualising your approach

To demonstrate the diversity of styles of project management approaches and methodologies, four groups of European Project Managers were tasked with agreeing a project management method. The groups developed four very different approaches as outlined below:

Structure 1: Structured Analysis and Design Technique
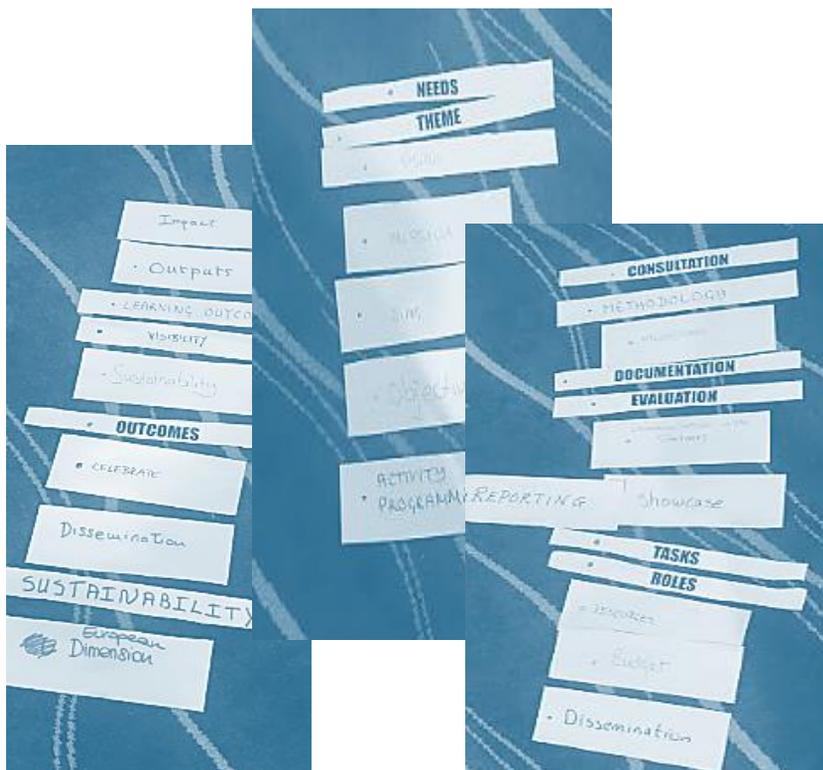
This method was considered by the group as a structured approach modelled on structured analysis and design technique (SADT) used in engineering. Each area allows for inputs, outputs and then results. Activities are not mutually exclusive. It manages expectations with added tools for online communication. It allows the team to visually and virtually manage the process and helps partners describe and understand the system.

Structure 2: Horizontal

This structure is horizontal in nature and is driven by documentation, visibility and planning as supporting pillars in the methodology. A key focus on stakeholders and the European dimension are built into the methodology, with evaluation and reporting highlighted towards the end of the project cycle.

Structure 3: Ladder

The visual image of this approach represents a ladder. The supports on the outside are the activities such as milestones, learning outcomes, documentation, reporting, budget and outputs. The rungs of the ladder are made up of tasks, needs, stakeholders, evaluation, dissemination and communication with partners, which the group considered is the main space where creativity and innovation takes place. There was a strong focus on outcome mapping within this approach and the approved budget underpinned each activity.

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Structure 4: Cyclical

The final group produced a cyclical approach, with consistent review and check-in before moving forward and a focus on continuous evaluation throughout, with a clear space for each project phase. The foundations and project plan form the rules for each partner to follow making it easy to work across organisations involved in the project. Milestones are indicated for each phase and allow flexibility depending on the results of research activities.

Each of the four structures had some common elements. These were the recommendations when agreeing on a project approach:

Tips!

➢ Include milestones throughout the project to celebrate achievements
➢ Develop a common project language as there is a varied understanding of terminology - for example, 'outputs' and 'outcomes' are often confused
➢ Do not underestimate the timeline for each activity
➢ Allow space for individual and group reflection
➢ Develop common templates but allow for diversity when dealing with stakeholders to include cultural norms, adapting to the specific situation within each partner country
➢ Remember that each activity is not exclusive and feeds into and impacts on other areas of the project lifecycle
➢ Remember that milestones and indicators are not the same thing
➢ Maintain oversight of the budget at each stage to dictate the scope and scale of activities

Building Reflective Practice Into Project Management

The group highlighted the need to build a structured form of reflective practice into the project management approach. This helps to:

- Contribute to **continuous improvement** of the project
- **Ensure relevance** and clear connection to the project scope and needs
- **Capture learning** gained by the consortium during each phase of the project
- **Contribute to an inclusive team**, creating a space for all perspectives
- Critically reflect on the activity and **identify gaps** within the project activities at an early stage
- Promote the **sharing of knowledge** between partners
- **Identify lessons learnt** from successful and unsuccessful activities
- Assist with **problem solving approaches** by identifying the route cause of the problem
- Contribute to the development of **creativity and innovation**
- Gain feedback on an activity through a **variety of perspectives**
- **Plan the next steps.**

> **It is important to remain up-to-date with local, national, regional and European developments in the subject area during the course of the project, and ensure these elements are built into the project. This helps the project to remain relevant and up-to-date when completed. This will contribute to sustainability.**

Many of the participants who implemented this approach designed the activities around Kolb's Learning Cycle, Gibbs' Reflective Cycle and Schon's Model. It is suggested that the activity of reflective practice is undertaken individually; then at local team level, to allow for cultural norms and perspectives to be included; and then at consortium level, where views and reflections can be shared, and feedback gained from a range of perspectives. This also helps to highlight the need for change in the approaches to some activities. When sharing at consortium level, it is important to allow a safe space to share without judgement. All members should have equal time and space to share their reflections. The participants who undertook this activity built time into the transnational meetings with an allocated space in the agenda. The format varied from individual presentations from each team followed by discussion, to chaired discussions, to informal learning activities to share experiences.

Each approach discussed is outlined below using the same example to illustrate the approach. The example used was **to develop a questionnaire and test it with a small group of the intended target audience in each participating country.**

Kolb's Learning Cycle: Effective learning is seen when a person progresses through a cycle of four stages of (1) having a concrete experience followed by (2) observation of and reflection on that experience which leads to (3) the formation of abstract concepts (analysis) and generalisations (conclusions) which are then (4) used to test hypothesis in future situations, resulting in new experiences.

Experiencing or carrying out the activity: Partner 1 developed a questionnaire and each partner tested it with a small group of the intended target audience in each participating country

Reviewing and reflecting on the experience: Each partner reflected on the experience and then brings the reflection to the consortium.

Partner 1 found that the target group had difficulty understanding the questions; the group involved with Partner 2 had literacy issues and it was too time-consuming and frustrating for them to complete; and Partner 3 found that the target group was so spread out across the region that it was difficult to reach them

Conceptualisation - developing ideas and learning from the experience: Through consortium discussions, it was decided to localise the questionnaire and frame the questions within an understandable scenario for partner 1. Partner 2 opted to develop facilitated discussion groups. Partner 3 developed an online questionnaire and arranged to attend an event where a large cohort of the stakeholders would be in attendance with permission from the organisers.

Experimentation - Planning or putting new ideas in practice: Leading back to step 1, the new methods were tested and again reviewed before rolling out the questionnaire across all stakeholders.

Gibbs' Reflective Cycle: This model allows you to work through an experience. This can be either a stand-alone experience or a situation you go through frequently, for example meetings with a team you have to collaborate with.

Description - Describe what happened or the activity, your role and the role of others.

Feelings and thoughts – What were you feeling and thinking? Some partners felt frustrated with themselves for not involving stakeholders in the initial development. They were afraid that this would impact negatively on the relationship. Partner 1 and 2 hold Partner 4 accountable, causing conflict.

Evaluation – What went well and what did not go well? For partners the initial meeting and outline of the project went well, however when it came to implement the questionnaire, Partner 1 faced challenges with understanding, Partner 2 with literacy and Partner 3 with geographical access to the target group.

Analysis – What sense can you make of the situation? The situation was embarrassing for all partners, as the needs of the stakeholders were not adequately considered - particularly when developing an output based on their needs.

Conclusion – What can you conclude from your experience? More consideration needs to be given to the target groups: more input from all partners is required to ensure the questionnaire meets the needs of the stakeholders and all activities with stakeholders at local levels.

Schön's Reflection in Action and Reflection on Action: This model was associated with thinking on the spot when something is not going to plan.

Reflection *in* Action: Reflecting on something as it happens -
Thinking ahead, analysing, critically responding

Reflection *on* Action: Reflecting on something after it happens -
Thinking through the situation and experience
Discussing and thinking about what should be
changed in the future

Partner 1 discovered that the group of people had difficulty understanding the questions. They took the time to explain the questions, setting them within a familiar context for participants.

Partner 2 discovered that the group had literacy issues and facilitated an informal discussion to gain the required answers.

Partner 3 visited some stakeholders and soon realised how time-consuming this was, therefore telephoned others.

Each partner addressed the challenge presented before them, thinking on their feet to obtain the required results.

Harnessing Creativity and Innovation in Project Management Approaches

Projects are evaluated on the criteria of innovation. This can mean using new methodologies or approaches for the partners involved, or developing unique outputs for the countries or for the target audiences. The European Project Managers highlighted the importance of showcasing the innovative elements of the project, as this distinguishes the project from others and acts as a critical element for sustainability and dissemination.

While it can be difficult to incorporate creativity and innovation into project management approaches, the European Project Managers provided the following insights:

Tips!

- A balanced approach must be taken to creativity, otherwise it can be easy to lose sight of the aims and objectives of the project.
- Creativity can be introduced into the way projects are presented to various stakeholders, using the most appropriate visual presentations to convey the same message to different stakeholders.
- Transnational project meetings can be held in culturally interesting or topic-specific venues.
- New ways of brainstorming among the project teams can be introduced, as well as new ways of conducting group work.

- Presentations and reports from meetings and activities can be presented in a variety of creative formats.
- Creativity can be presented in the logo, the look and feel of the project. This must be done carefully so it is widely understood among stakeholders across various countries involved.
- It is useful to employ a methodology or innovation checklist from the start e.g. how will we know that this output is innovative? How will we measure this?

There must be a balance between compliance and innovation: project outputs should be innovative, but also comply with the original specifications as approved at application stage.

Assigning Roles and Responsibilities

Roles and responsibilities are identified for each partner at application stage. However, sometimes the specific person or people in the local project team have not yet been identified. There were diverging approaches to the allocation of roles and responsibilities among the partners, which were dependant on:

- How well the partners knew each other - for example, having previously worked together
- The level of input of each partner in the development of the application form
- Familiarity with each partner's work related to the project topic
- What was stated within the approved application form.

Tips!

Assigning Roles and Responsibilities

➢ Develop a clear project plan and identify all tasks that need to be carried out for every aspect of the project, including project outputs

➢ Conduct a skills audit among the consortium, identifying the strengths of each partner

➢ Refer to the approved application to see which partner was allocated which role

➢ Match the required activities and skills with each partner

➢ Consider the availability of resources within each partner organisation, as well as their daily workload to ensure that they have the time to commit to larger tasks

➢ Allocate the roles on a consensus basis, but be careful not to over- or under-allocate to one partner

➢ Encourage cross collaboration and peer learning approaches for partners who may have more experience in an area than the allocated partner

➢ Draw up a project consortium chart like an organisational chart to demonstrate the roles and responsibilities of each partner, as well as the value and contribution to the overall objectives of the project

➢ Develop a mechanism to recognise the contribution of partners at each milestone, celebrating success

Developing Timelines and Time Management

The project duration is set and there is limited scope to extend the duration of the project. Therefore, time management is central to transnational cooperation projects.

Tips!

Time Management

- Underestimating required time will have a large negative impact on your project
- Consider the time of people external to the project partners such as external stakeholders, who would have limited time to commit to project activities
- Use the project plan and breakdown of each task in conjunction with the Gantt chart
- Do not undervalue the importance of the project Gantt Chart which illustrates the interdependence between activities as well as an initial timeline

- This should be used to finalise your project timeframe and track project progress and makes an important contribution to communication
- It is important not to deviate too much from the approved application as this may impact on the budget and overall timeframe for the project
- Planning is key: a good project plan will ensure good time management

Time

Task 1

Task 2

Task 3
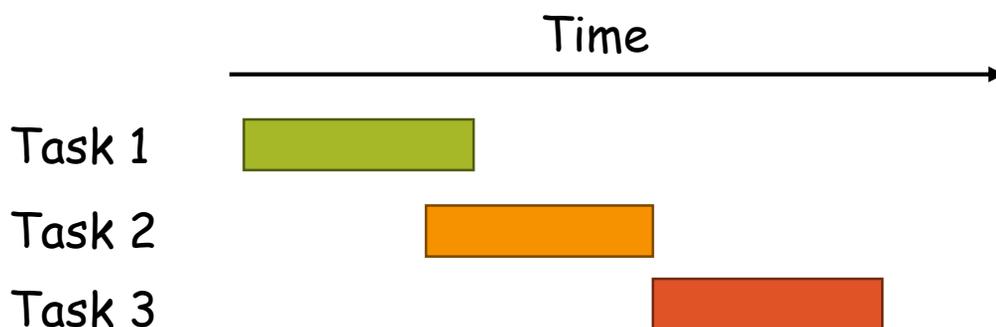
Project Milestones

Project milestones and indicators are distinctly different elements. Project milestones are sometimes referred to as indicators because they can indicate a point in time of the project. However, indicators are used to *measure* performance while milestones are used to *track* progress, time management, or mark when a new activity will begin. Project milestones should be further developed and built into the project plan and activities.

A recurring theme among European Project Managers was the need to celebrate success. It was noted that only the project team will see this success, as it is hidden from those outside the project until the final outcomes are released. However, the consortium will need to be careful to distinguish between a milestone and a completed task.
Milestones are significant events within the project.
The first milestone is project approval.

Milestones can be used as points where:
- Further budget payments are made to partners
- Official and documented monitoring takes place
- Evaluation of progress and quality can occur
- Interim reports are due
- Stakeholders are informed.

Milestones are important for project planning and ensuring the project remains on track. However, milestones do not measure performance or quality.

Selecting Project Management Tools

The traditional project management cycle is **initiation**, **planning**, **execution**, **monitoring and control** and **evaluation**. There are tools and templates linked to each project phase.

Phase	Key Area or template of relevance
Initiation	Project Charter
Planning and design	Work allocation and breakdown: Project Gantt chart Communication plan Risk management plan Project outputs Clear breakdown of roles and responsibilities
Execution	Tracking progress: Timeline, Gantt Project Status Reports Interim report
Monitoring and Control	Checking activities are in line with goals and budget: Budget tracker Milestones Indicators Evaluation activities
Close/evaluation	Reporting and final evaluation Final Report

The phases of this cycle are outlined at application stage. However, once a project is approved there is an opportunity to re-examine and refine the initial approach, and outline it in more depth.

It is important to remember that the **scope** of the project cannot be changed, as this aspect is central to the initial evaluation of the application. Any deviation will impact on the approved project, and will require consultation with the National Agency.

Practical Tips on Selecting Project Tools

Project management approaches involve several tools with the primary purpose of tracking resources, stakeholders, budget, timelines and managing tasks and expectations. There are a wide variety of tools available and the participants advocated redeveloping existing resources and templates to suit the project.

There are a wide range of project management applications available. Some are free, some require a one-off fee or a monthly subscription. It is important that an informed decision is made when selecting a project management tool.

Group Process for Selecting a Project Management tool

Each partner **suggests a project management** tool

⬇

Using the project plan, outline **the consortium requirements** and expectations for the project management tool

⬇

The consortium discusses the **advantages and disadvantages** of each proposed tool and start a process of elimination

⬇

Consider **accessibility for all partners** (for example, one partner may not have a reliable internet connection)

⬇

Discuss the **experience of each partner** with tools they have previously used and develop a shortlist

⬇

Examine each tool for **usability** and select

⬇

Once selected **provide training** to partners who are less familiar or new to the tool

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Not all partners use a project management application. Some use Google Docs, Dropbox or other cloud-based platforms to store their documents, ensuring accessibility for all partners. The main rationale provided for the use of project management applications was ease of communication and transparency in tracking activities.

Some European Project Managers suggested that it is easy to fall into a trap of having several tools, mechanisms and applications fulfilling the same functions, or overlapping in function, which becomes time consuming to manage and check. It is important that there is no duplication across tools to ensure a streamlined approach.

Examples of Virtual Cooperation tools used by European Project Managers:

Tool	In a nutshell	Advantage	Disadvantage	Link
Trello	Visual way to see what needs to get done	Flexible, visual and free	Can become confusing for large teams	https://trello.com
Microsoft TEAMS	Part of Office 365, allows chat-based collaboration to share information	All tools available in the one place	All partners require Microsoft office and there are many apps which can become confusing	https://products.office.com/en-us/microsoft-teams/group-chat-software
Balanced Score Card	Used to measure performance or track progress, links to strategy	Helps identify key goals and interaction between objectives	Time consuming and sometimes complex to understand	https://www.balancedscorecard.org
REDMINE	A project management tool and issue tracker to allow the management of multiple projects and subprojects, with a wiki and forum for each project	Free and open source, useful to see time worked and time remaining	Not easy to use beyond basic elements, further use requires training	https://www.redmine.org/
Teamwork Projects App	Helps manage group objectives through tracking time, projects, messages, task lists	Allows time logging	Requires payment per user	https://www.teamwork.com/project-management-software/apps/

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Project Charter

Some transnational projects had chosen to develop a Project Charter to reflect the scope, objectives and people involved in the project.

Key aspects of a project charter:

- A project charter provides an outline of the scope and goals of the project; the roles and responsibilities of each partner; identifies the main stakeholders; and establishes the role and remit of the project coordinator.
- It acts as a quick reference point throughout the project, creating a shared understanding of the project for the consortium and for their organisations. It can be considered the business case for the approved project.
- It can act as a dissemination tool when informing stakeholders of the project.

- It acts as an uncluttered road map of the project - the more detailed elements can become distracting, especially during project meetings.
- It should contain enough information for team members, stakeholders and external people to understand, but it should not contain minute detail of all activities or work packages. Much of the detail should be available within the approved application form submitted.
- The charter should be agreed among partners and signed by all partners involved in the project.

Checklist ☑   **Questions to address in your Project Charter**

- ❑ Why is the project being carried out?
- ❑ What are the overall aims and objectives?
- ❑ What will be the outcomes of the project?
- ❑ Who is involved in the project and what are their roles?
- ❑ Who are the key stakeholders?
- ❑ How is the project governed? For example, steering committees, role of the coordinator
- ❑ How long is the project and when it will start and end?
- ❑ What is the overall project budget?
- ❑ What is the communication plan within the project and with stakeholders?

Partnership Agreements

Almost all European Project Managers developed partnership agreements or contracts between each partner and the coordinator. The rationale for this is to ensure that there is a clear understanding of expectations, roles, activities to be undertaken, how conflict will be managed, how and when payments will be made, reporting requirements and expectations of quality. There was divergence between the contents of the agreements, depending on the nature and scope of the projects. However there were a number of common elements central to each contract.

Checklist ☑   Items to include in your Partnership Agreement

- ❑ The role and remit of the coordinator
- ❑ Project Timeline and Milestones
- ❑ Role and responsibilities of the partner
- ❑ The budget for each partner
- ❑ Financial and narrative reporting deadlines
- ❑ Templates for narrative and financial reporting
- ❑ The documentary evidence required for project activities
- ❑ The financial rules and regulations
- ❑ Timesheet requirements for outputs
- ❑ Conflict management procedures
- ❑ Complaints procedures
- ❑ Code of conduct of partners
- ❑ Safety statements and guidelines for projects involving young people, people with disabilities and vulnerable young people or adults
- ❑ Consequences of non-compliance with the agreement and the process of how this will be carried out
- ❑ Decision making processes
- ❑ Data protection guidelines and regulations
- ❑ Commitment to compliance with the European Commission rules and regulations and those specific to the partnership
- ❑ How the quality of the project will be measured and the role of each partner in quality management

Project Handbook

Many project consortia develop project handbooks. The aim of a Project Handbook is to act as a reference guide for all partners. It is updated throughout the project lifecycle until the project ends. Many of the European Project Managers present at the Transnational Cooperation Activity developed project handbooks which contained many of the elements of partnership agreement. However, a significant difference was that the project handbook was not only between the individual partners and coordinator. Instead it addressed all partner budgets, activities, contribution, team members, activities and indicators. There was more of a focus on the project timelines and project plans agreed among partners. A partnership handbook can be easily developed when documents such as the project charter, team charter, communication plan, timeline and other documents have been developed. The European Project Managers considered this to be a live document, with additions made as the project evolves. It contains records and results of activities against the indicators outlined and contributed strongly to reporting with the information available in one place.

Checklist ☑ — Items to include in your Project Handbook

- ❑ Project description
- ❑ The aims and objectives of the project
- ❑ Project and Team Charter
- ❑ The timeline and role of each partner in each phase and activity of the project
- ❑ Conflict management procedures
- ❑ Decision making processes
- ❑ Templates for narrative and financial reporting
- ❑ The financial rules and regulations
- ❑ Reporting templates
- ❑ Safety statements and guidelines for projects involving young people, people with disabilities and vulnerable young people or adults
- ❑ Data protection guidelines and regulations
- ❑ Communication plan
- ❑ Project quality plan
- ❑ Dissemination plan

Financial Management

There is a large variation in the way financial aspects of the project are managed across all projects. Much of this depends on the following factors:

- Size of the organisation and available resources - large organisations tend to have a financial manager, whereas smaller organisations rely on the project team
- Experience of participating in European Transnational Projects
- Understanding of the rules and requirements of the programme.

During the evaluation of the submitted application, there may be recommendations made to reduce the project budget in certain areas at contracting stage, for the following reasons:

- Costs are ineligible according to the Programme rules
- Unjustified number of days for outputs
- Excessive number of project meetings with no clear rationale provided
- Unexplained costs.

Amendments will need to be made and communicating financial matters are key to ensure a shared understanding among the partnership.

> **It is important to remember that the budget is linked to quality. This is controlled by the National Agency through evaluation, monitoring and reporting and the final report processes. Two key questions to keep in mind throughout the financial management of the project are "is this in line with the approved application?" and "is this value for money?". If the answer is no, you must contact the National Agency to seek approval for any changes to ensure compliance with the rules and regulations.**
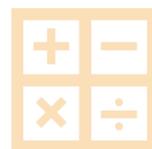
Communicating Financial Matters

The first opportunity to discuss finances after project approval is at the project Kick-off meeting. It is important that all partners are present for this meeting.

Before the kick-off meeting, draw up a contract with each partner with a section dedicated to finance. This should be sent in advance to ensure that there is time to read and consult with colleagues within each partner institution. It should include a tailored contract for each partner in relation to finance to outline:

- The grant for each partner under each budget heading
- The frequency of grant payments
- The conditions attached for payment both in terms of quality and reporting requirements.

The documentation required for financial reporting including any templates (for example, sign-in sheets, certificates of attendance etc.) can be included as an annex in the Project Handbook.

> Participants had different approaches to handling project finances. In some partnerships, the coordinator books all the flights and accommodation for mobility activities; in others, partners book their own flights and reclaim the cost from the coordinator after the activity. When drawing up the contract, ensure all partners are considered. For example, some partners may not have the resources to pay for flights and accommodation in advance of receiving the grant or host multiplier events without some financial support towards the event. All partners should follow the same process.

Developing Financial Management Tools

There are a wide range of tracking tools for project finance available. Whether you develop or adapt tools for use with your project, make sure they are:
- Simple, clear and easy to use
- Consistent across all partners
- Easy for the coordinator to monitor the overall budget for each partner and the consortium as a whole.

It is important to provide information on when and how information should be completed. This should link with the project timeline. For example, when an output is completed, the finance section related to this output should be completed and the consortium can easily monitor the budget and timeline simultaneously.

Managing Risk

Risk Management is a key consideration of any project, particularly in transnational projects that have an extended duration and multiple outputs. The following advice was shared on risk management:

Tips!

✓ Build on the risk analysis plan outlined in the application at the first partner meeting.
✓ Ensure that risk analysis is updated throughout the project.
✓ Risk analysis should always include a conflict resolution process.
✓ There is a "risk" of a long list of risks being drawn up! Therefore it is useful to rank these in order of priority and reprioritise on a regular basis.
✓ Participants highlighted the importance of contingency plans for large risks that could negatively impact the project.

Identify the risk areas

Assess the risks

Risk Assessment

Risk Control

Re-evaluate the risks

Implement risk management actions

Develop your risk management plan

Managing Project Meetings and Events

Transnational Project Meetings are crucial to the overall success of any European project to allow partners to meet face-to-face, build relationships, plan project goals and ensure the smooth running of the project. Projects normally hold a number of meetings across the lifetime of the project, with partners taking turns to host each meeting. Beneficiaries then have the opportunity to experience the culture and language of other member countries, as well as gaining insight into the partner institutions. European Project Managers provided the following tips when preparing for project meetings:

Partner Meetings

Tips!

- ✓ It is important that all partners prepare for each meeting, not just the host organisation
- ✓ An external evaluator or observer can be a useful addition to a meeting
- ✓ Keep communication open and allow opportunities for feedback

- ✓ Social Events are important, for example a 5km run before a project meeting, visiting local museums or having team meals in the evening
- ✓ Develop a checklist and templates for agendas and minutes

General Project Meeting Checklist

- ❑ Times, place and location
- ❑ Purpose and objectives of the meeting
- ❑ Agenda
- ❑ Preparatory work required by all partners
- ❑ Accommodation options and prices
- ❑ Nearest airport and travel from the airport to the location
- ❑ Local customs
- ❑ Weather and recommended clothing
- ❑ Local cultural activities for those arriving early or late
- ❑ Accessibility
- ❑ IT Equipment required

The first project meeting will set the tone for the partnership. It is generally where the following are agreed and discussed:

Checklist ☑   **Kick-off Project Meeting Checklist**

❑ Project Charter
❑ Team Charter
❑ Communication plan
❑ A common understanding of key terms related to the topic of the project
❑ Introductory presentations take place where partners are not overly familiar with each other
❑ Finances and budgets explained
❑ Approved application is reviewed and roles fined tuned
❑ Risks reviewed
❑ Project management tools selected and user accounts set up if required
❑ Project plan finalised and timelines confirmed
❑ Stakeholder analysis discussed
❑ Dates of future meetings
❑ Milestones and indicators
❑ Reporting deadlines
❑ Roles agreed and tasks assigned
❑ The external look and feel of the projects such as websites, logos are discussed and developed
❑ Press release for stakeholders

The minutes of the meetings should be written and circulated as soon as possible after each meeting. ❗

Project Events

Project events are an opportunity to showcase the project to external audiences. They can include presentations at stakeholder meetings and conferences, as well as project-specific dissemination events.

Participants highlighted that external events are important for dissemination and creating an interest in the project, therefore it is important to make a good impression and appear professional.

Tips! Disseminating your project at an external event

- Prepare your presentation and practice in advance
- Ensure the delivery is clear and follow good practice guidelines for presentation material
- Have business cards with the project logo and website
- Include information about all partners to demonstrate the transnational nature of the project

- Alter the information to suit the relevant audience: your stakeholder analysis will highlight the key messages they receive
- Overviews of the project should be kept very short and more focus should be placed on the key messages

The format and type of information you provide will very much depend on your audience. It is important to reflect on who will be present and adapt your approach accordingly.

Audience	Approach
Policy makers	• Keep it high level and demonstrate clear links to policy, the potential impact on policy, and the area of education or training
Educators	• Provide evidence-based results to demonstrate that the 'product' works • Highlight the ease of product use and implementation into the classroom and benefits for learners
Learners	• Share a story of the potential learner journey and the support offered to increase the knowledge, skills or competences

Hosting your own project event

The project consortium will have limited input into the organisation of external events as they are not the direct organisers. However, they have complete control over events they organise themselves. Participants suggested the following division of work among the team:

- Logistics
- Social Media and Communications
- Event content

Checklist ☑ General Project Event Planning

- ❏ When and where it will take place
- ❏ The objective of the event
- ❏ Number and profile of attendees
- ❏ Draft agenda
- ❏ Budget
- ❏ Format of the event (discussion groups, presentations etc.)
- ❏ Agree speakers
- ❏ Agree invitees

Checklist ☑ Logistics

- ❏ Venue booking and check for accessibility for people with disabilities
- ❏ Catering including dietary requirements
- ❏ Name tags
- ❏ Exhibition stands
- ❏ Registration table
- ❏ IT Equipment required at venue including microphones
- ❏ Room setup
- ❏ Pack for attendees to include pens, paper and relevant material
- ❏ Track event budget

Checklist ✅

Social Media and Communications

❑ Develop social media pages for a public event
❑ Send 'save the date' notice
❑ Set up event registration page with information on directions, public transport and parking as well as the draft agenda
❑ Design and send invitations – ask about food allergies or dietary requirements
❑ Write and issue press release
❑ Create social media hashtag and content to upload during the event

Checklist ✅

Event Content

❑ Invite speakers and/or exhibitors
❑ Book travel for speakers
❑ Write speaker notes
❑ Create a detailed workshop programme
❑ Prepare the content for each area of the agenda
❑ Prepare presentations
❑ Collect presentations from speakers and create a slide deck
❑ Develop feedback forms for participant packs

Embedding Quality Management In Your Transnational Project

What is Quality Management?

Quality management is a key pillar in European Project Management. Projects can be delivered on time and within budget, but without good quality management they may not provide added value or be fit for purpose. All transnational partnership projects are required to outline how they will monitor the progress and quality of their project when they write their application. This involves both Project Management and Quality Management. Quality is a very broad term, with different interpretations and understanding across all project consortia.

It is important that there is a common understanding and approach across the partnership, particularly about the common terms used. Quality Management involves developing processes or templates for verifying the progress of the project (e.g. project status report or tasklists) and normally involves the project partners and sometimes an external evaluator. It also includes approaches or tools for verifying the quality of the project processes (e.g. partner meetings, communication etc.) as well as the quality of the project outputs.

"Project Management is the what, and Quality Management is the how."

- **Monitoring** is the continuous action that reviews the activities and progress of the project to ensure it is achieving the original aims and objectives.
- **Evaluation** is a periodic action that assesses the quality and effectiveness of the activities, outcomes or outputs. It can be measured using both quantitative and qualitative indicators.
- **Indicators** are measures (both qualitative and quantitative) that allow you to track progress towards the changes you wish to achieve.

Key Aspects of Quality Management

Quality management is not only about review i.e. looking back. It is also about being **proactive**, **preemptive** and working to mitigate risk.	It should be **ongoing** throughout the project.	In addition to receiving feedback from others, including external stakeholders, it also involves **self-reflection.**	It is a learning process and should result in **review** and **adaptation** if necessary.

Participants also discussed the fine balance to be achieved between compliance and quality. For example, feedback from stakeholders may result in changes to outputs but compliance with the original application needs to be maintained. They advised always checking with the National Agency if compliance with the application is in doubt.

"Quality Management is like a friendly critic"

While poor quality management can be visible in project outputs, there is also the hidden impact on the project consortium. This includes low morale, conflict, lack of value of participation, reputational damage, or a decrease in customer satisfaction. Furthermore, at final report stage it can lead to a reduction in finances.

Approaches to dealing with project quality issues:
- ❑ Self-reflection evaluation
- ❑ Developing the evaluation criteria together at the first meeting
- ❑ Anonymous questionnaires (with tick boxes 1-5)
- ❑ Focus groups with project partners
- ❑ Addressing specific issues in a broad way rather than singling out individuals.

Quality Management in Transnational Partnership Projects

Why undertake it?	What to check?	Who is involved?	How to check?
• Ensures that the results are relevant and usable by the end users • Accountability to funders/ stakeholders • Provides added value, ensuring that needs are being addressed • Check standards for certification/accredit-ation • Demonstrate impact	• Outputs/results • Project Processes/meetings • Communication • Training activities • Project events • Dissemination activities	• Project team • End users • External evaluator • Participants • National Agency • Employers • Teachers and trainers • Other staff of beneficiary organisations • Advisory groups	• Indicators (Qualitative and Quantitative) • Measurements before and after • Questionnaires • Focus Groups/reference Groups • Advisory groups • Quality plan

Making a Quality Plan

All participants agreed that a Quality Management Plan is a useful tool for the project.
The following headings can be used as the basis of your Quality Plan:

Objectives
- Project Objectives
- Quality Management Objectives
- Compliance with application
- European Priorities
- Impact

Project Management
- Management Processes
- Communication
- Reporting

Activities
- Partner Meetings
- Project Events
- Dissemination

Outcomes
- Innovation
- Accessibility
- Target Group
- Stakeholder review

Relevance

Indicators
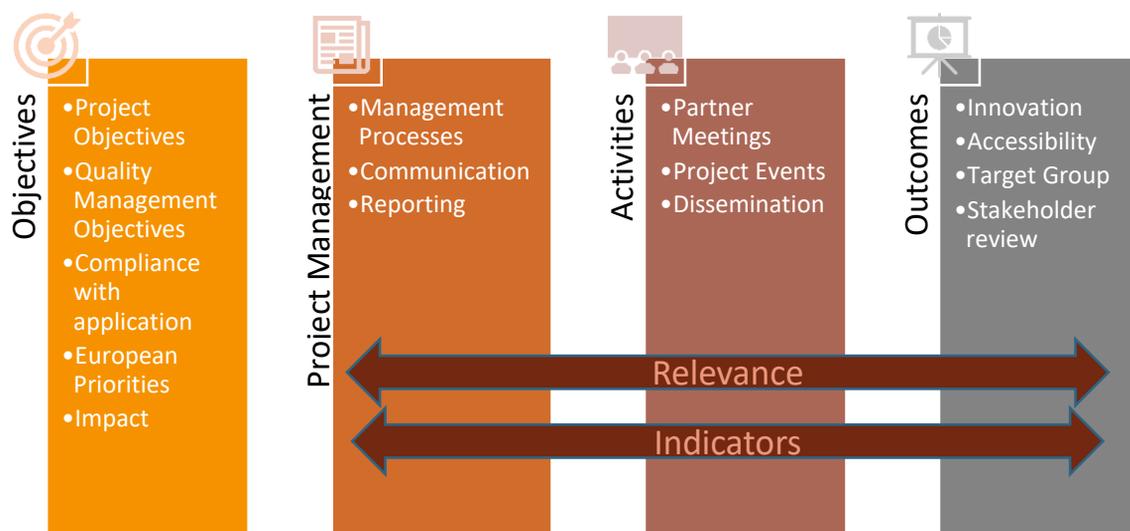
Developing your Quality Plan

Quality management is linked with avoiding risks and should be built into all aspects of the project management plan.

It is crucial that quality management is a planned process to ensure that the requirements of the Programme, National Agencies, European Commission, participating organisations and other stakeholders are met.

Tips!

Designing a Quality Plan

➤ Quality is the responsibility of all partners, however assigning quality to a specific partner or committee will help drive the importance. Generally it is part of the remit of the steering committee and should be a standing item on all meeting agendas.

➤ Work together to consider what aspects will be subject to quality review.

➤ Set quality objectives for project management, activities and outputs Before the project begins. These should be evident and built into the project management plan.

➤ Consider how the consortium will measure quality and what indicators will be used to monitor the project and measure progress. Indicators will inform when adjustments need to be made and help to analyse patterns.

➤ Develop the processes that will achieve the objectives to include checklists, indicators and milestones. These are built into the project timeline, project charter and quality management plan.

➤ During the project, monitor and evaluate the processes to ensure they are meeting the quality requirements and validate at key project milestones; this will help identify challenges at an early point and contribute to continuous improvement.

➤ Ensure there are plans in place to act on quality deficits found during the project lifecycle. This contributes to continuous improvement.

➤ While testing of outputs may have taken place at each stage in their development, it is equally important to conduct testing of the output in its entirety.

➤ Validation can also be sought through an external evaluator giving an objective perspective.

"There is a difference between an outcome and a good *outcome!"*

Evaluating the quality of project outputs and deliverables

There are a range of methods and approaches to undertake quality monitoring and evaluation:

o **Peer review** involves using experts in the same field. It aims to remove personal bias and provide meaningful outputs relevant to the area of expertise and ensure validity of results.

o **Logic Model** is a clear plan that describes the intended outcomes and the steps and use of resources to meet the goals and objectives. It is useful for quality and evaluation.

o **Critical Friend** is a trusted and supportive person or group of people with knowledge of and working within the field who will provide honest and constructive feedback. They are not consultants or advisors and see themselves as a 'friend' of the work.

o **Theory of Change** builds on the logic model. It places more emphasis on the involvement of stakeholders: the hope is they become involved in the design of the process, giving greater creditability to the project. It involves the identification of how change will happen, the roles of the partners and stakeholders in contributing to the change and the testing of assumptions.

o **Knowledge Translation** in its simplest form is an all encompassing term for transferring the tested and evidence-based research into the domain of the end users. However, definitions vary and there is no clearly agreed version.

Tips! Evaluating the quality of project outputs and deliverables

➤ Develop a Quality Criteria for each Intellectual Output. This includes reviewing the approved application and taking into consideration the expected impact of the intellectual outputs outlined in the proposal.

➤ Consider that there are time constraints for review; there should be enough time built into the project timeline to ensure that the outputs can be tested in full and feedback implemented.

➤ Ensure that you involve the right people in the right numbers (quantity v quality). Consider if sending a questionnaire to 200 organisations in each country would provide the same results as a focus group with 15 key stakeholders in each country.

➤ Outputs should be subject to systematic review and adjustment; the plan should be flexible enough to allow for this.

➤ It is important that reviewers are asked the right questions and have time to consider so that the review is not just a tick-box exercise. All quality management activities should be meaningful, relevant and appropriate.

➤ Review should involve a collaborative approach, involving all partners and other internal and external stakeholders.

➤ Consider cultural and language differences when receiving feedback and ensure that the language used is accessible to the stakeholders involved and cannot be misunderstood.

The Importance of Indicators

Indicators or key performance indicators can be qualitative or quantitative. They are used to measure:

- Quality of outputs
- Stakeholder satisfaction
- Number of users of outputs
- Number of publications, dissemination material or participants reached.

Indicators are set in the project application. They should relate to the aims and objectives of the project. They can be divided into two types:

- **Indicators demonstrating that the project is running as planned** e.g. the expected number of participants come to events, take part in training activities, share information. These are usually based on numbers or percentages. They are easily measurable; however, they do not indicate quality.
- **Indicators that demonstrate a change** and that the project is achieving the desired results. They are harder to measure and are necessary to demonstrate the relevance and quality of the outputs.

Setting Indicators

The participants agreed and it is generally accepted that indicators should be SMART:

Specific – is it clear what exactly is being measured? Clearly identify what will be measured to determine the indicator.

Measurable – can it be measured and is it comparable (e.g. across target groups and end users) allowing change to be compared and aggregated?

Attainable – it is realistic and achievable?

Relevant – is it relevant to the project and feasible to collect within a reasonable period?

Time-bound- When will the details be collected? When will the results be available?

Tips!

> When selecting indicators it is important to:
> * Identify what is changing
> * List all of those who are involved in the change
> * Consider when the change is going to happen.

Setting Indicators

> It is important to obtain a baseline to determine a change in behaviour, attitude, knowledge or skills to demonstrate a change has occurred.
> The information collected should be credible, objective and not based on assumptions.
> Qualitative indicators can also be presented in quantitative terms.

Measuring Indicators

Indicator	How measured	Who is involved	When measured	Qualitative	Quantitative
The change in attitude among young people towards reading books as a result of a promotional campaign among youth groups	Baseline obtained through informal facilitated discussion with young people and their youth leaders and consortium partners as well as questionnaires Youth leaders will monitor attitudes and behaviour Partners will develop a facilitated workshop and questionnaire to determine any change from the initial workshop and questionnaire results	Young people involved in 3 youth clubs in each partner country Youth leaders allocate time to explain and outline the campaign Partners develop and design facilitated discussion workshops and questionnaires	Baseline obtained before release of campaign Six months after the campaign	Young people commenced book club as a result of the campaign Young people set up a book exchange 75 out of 100 young people were reading more than three books a month compared to none previously	A 75% change in behaviour was noted

Obtaining Feedback

Feedback forms part of the project management process as well as contributing to quality and evaluation.

When and how is feedback gathered?

- After project activities such as meetings and events, for the internal project team to reflect on how well the activity went. This can be done through discussion, questionnaires or partner reports and will contribute to the organisation and running of better activities.
- Where stakeholders are involved in activities, a feedback form can be included in their information packs or time allocated in the agenda of activities to provide feedback. Questions asked should be directly relevant to the activity and using a rating scale is recommended.
- During piloting activities or training courses, participants can be asked to keep a reflective diary with space built into the agenda to gain feedback and areas for change.

- Focus groups with stakeholders where the project is addressing their needs with meaningful engagement.
- Follow up emails (be sure to consider GDPR; sign-up lists should provide clear information as to how the email addresses will be used).
- Social media pages such as Facebook or a feedback section on the project website.
- Interviews or story telling about the experience from participants.
- Assessment of new skills or knowledge via pre- and post-questionnaires or quizzes.
- Through obtaining baseline results of project target groups.
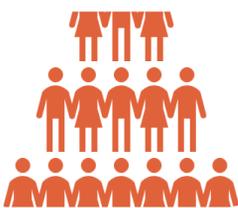
Events	Piloting	Focus Groups

Emails	Social Media	Interviews

Tips!

Gathering feedback

- ➢ Think about the approach e.g. a questionnaire is appropriate to obtain top level feedback from a wide range of stakeholders, but interviews are more appropriate to get specific feedback from specific people.
- ➢ It is important to carefully consider the questions you are asking.

- ➢ Consider the people who are giving the feedback, and implement mechanisms making it easy for them contribute and ask their own questions.
- ➢ It is important to act on feedback to maintain trust among the consortium and between stakeholders as well as demonstrate meaningful participation of stakeholders

Obtaining feedback is a continuous process which is built into the project plan and timelines.

Project Planning

Feedback

Project Meetings

feedback

Project Implementation

Feedback

Project Activities

Feedback

Dissemination

Feedback
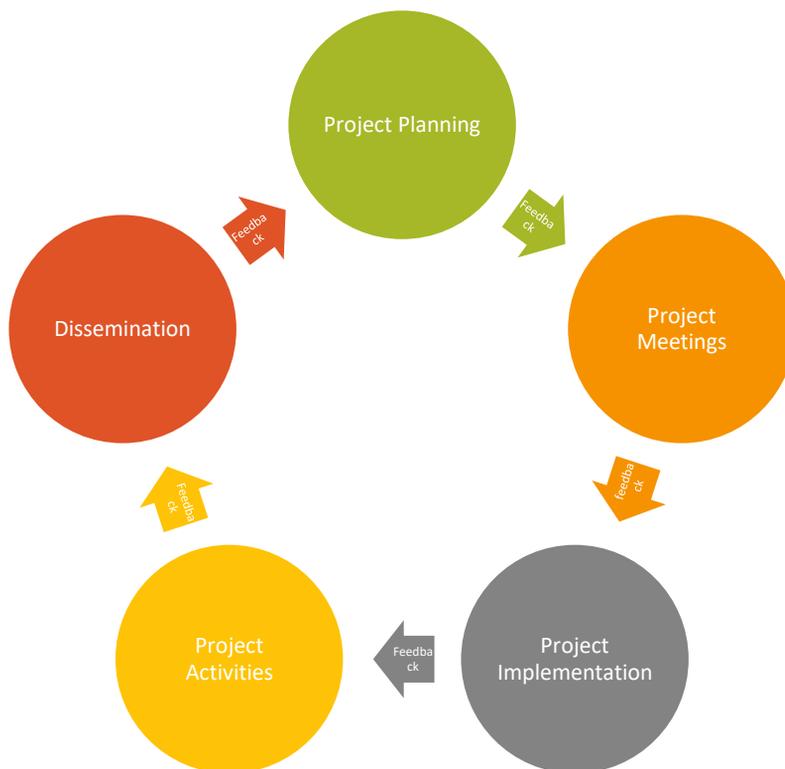
Developing Transnational Outcomes

The Challenge: From National to Transnational

When project partners come together to work on a project this involves looking at a common cause or problem with the intention to develop a solution that can work in different national contexts.

The magic of working transnationally is that each partner brings knowledge of their national context, approaches, and experience which informs continuous exchange, sharing of practices, and innovation!

This opportunity can also pose a challenge for projects working transnationally. How can you capture the unique approach and perspectives of a consortium, and at the same time ensure the outputs are relevant, transferable and adaptable from national to transnational level?

It is important to say that dissemination and exploitation are not the same thing. Simply having people know about your project does not mean that your audience can use your project results.

It is not enough to disseminate your project results, you also need to ensure that the project results can be used and exploited by the target audience nationally and transnationally.

There are **opportunities** as well as **challenges** which need to be identified when developing project outputs transnationally.

Knowing these opportunities and finding solutions to challenges can inform a good **EXPLOITATION PLAN.**

This means thinking about what is required to make project outputs **usable, accessible, transferrable and adaptable** to your transnational audience.

National ⟷ Transnational

Developing an Exploitation Plan

There are four areas which should be taken into consideration when developing a checklist and guidelines for an **EXPLOITATION PLAN.**
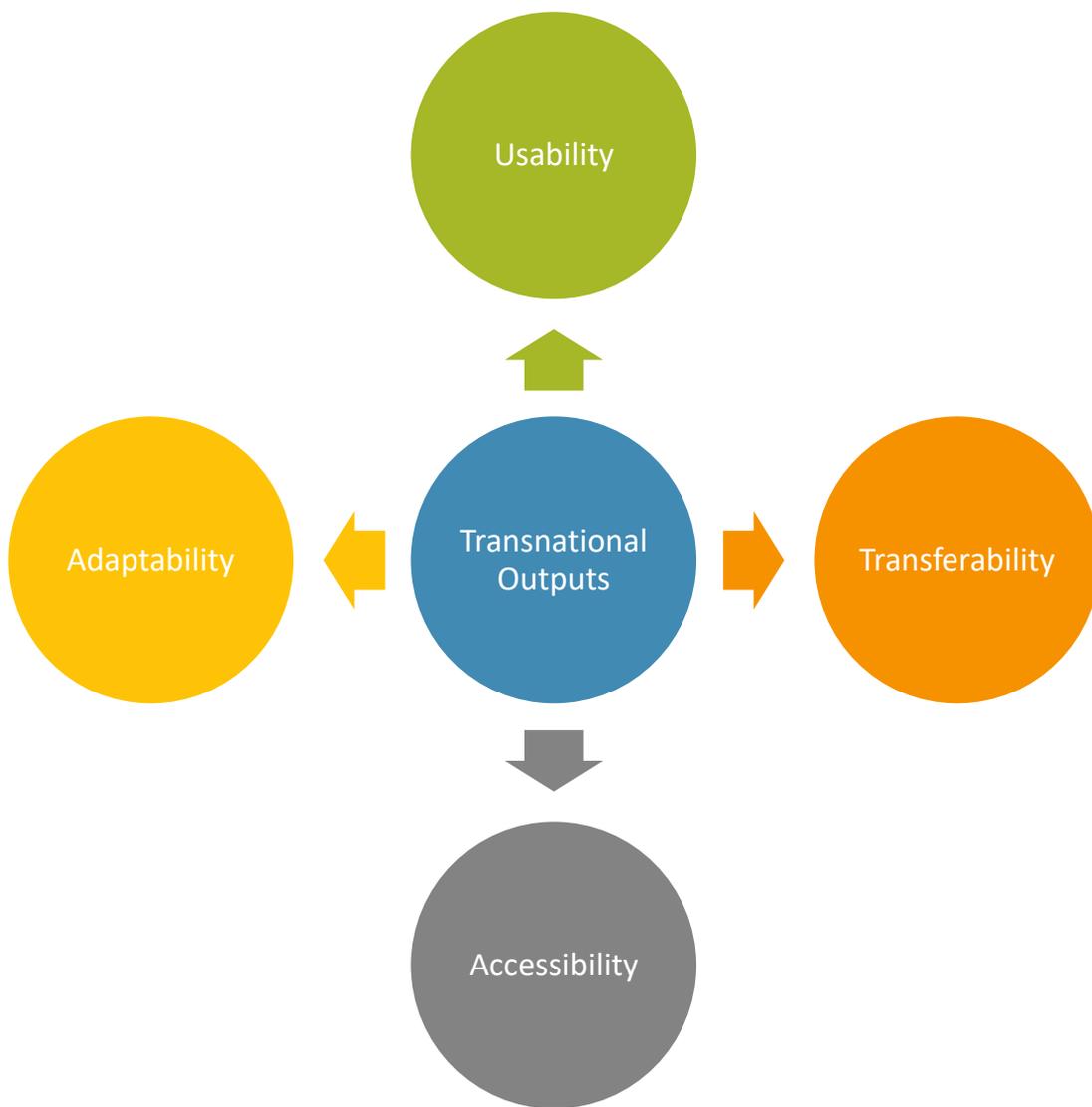
Accessibility

Dissemination and exploitation can exist in their own rights. Dissemination can be used to alert people to the existence; however, exploitation cannot take place without knowing the correct and relevant networks and platforms for the audience to access the outputs. Readability is a key point and must reflect the knowledge, skills and competences of the end user.

Tips!

➤ Resources should be free and open.

➤ They should be available from multiple sources and in various formats to suit the needs of different target audiences. For example, information can be presented in an infographic providing both visual and narrative representation or interactive in nature.

➤ If downloadable, they should be easy to download and not require the installation of additional software.

➤ There can be output restraints using the chosen platform. A complete review of the platform should be carried out identifying the strengths, weaknesses, opportunities and threats.

➤ The EU project managers considered it best practice to present the information 'above the fold' on a website, and use a balance of text and graphics.

➤ Match your resources to platforms where outputs can be maintained and updated.

➤ Translate into languages other than English; outputs should be available in multiple languages. This is particularly important for inclusion for target groups where language may form a barrier to access. Where outputs are translated, it is best to tailor to local need and avoid generic language which will not engage the target groups.

➤ Keep It Short and Simple (KISS): this will help maintain engagement and ensure material is easy to read, holds the attention and is memorable.

➤ Inspire others – don't guide them! Ensure the outputs are flexible enough for users to adapt to their own needs.

➤ Consider creating a guide that specifies how the output can be used.

Adaptability

*Each project should be able to find something that can **inspire** the target audience. The project should identify how the outputs can be used by **different target groups in different national contexts.***
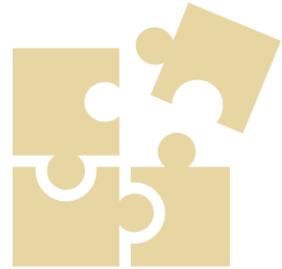
Tips!

- ➢ Ensure that formats can be easily adapted by organisations across the EU, allowing them to use these new resources alongside existing resources.

- ➢ Keep the packaging of the entire suite of outputs useable and adaptable.

- ➢ Keep the format simple.

- ➢ Include the thinking process behind results to ensure people can follow the thought patterns in the development of the project, which can help bring new perspectives.

- ➢ Present material in a modular structure, so pieces of information can be taken and adapted or inputted in current provision.

- ➢ Summarise key ideas which can be used in other fields/cultures.

Usability

Project planning should include how the project will engage with the target group. Careful consideration of the needs of the target group is key to developing any output. Involving them from the outset will ensure the outputs are accessible and relevant to their needs

Tips!

- Relevance to the audience is important; primary research should underpin this, evidenced by the need for the outputs.
- Consider the best design for exploitation. For example, is a large body of text suitable for engaging learners with literacy issues or policy makers with limited time to read?
- Think about the target groups. What would be their incentive for using the project outputs and what would motivate them to use it? An analysis of the best channels to reach the target groups should be carried out.
- The right tools should be used for the right audiences. For example, one target group may be interested in quizzes another group may favour small pieces of digestible information.
- Secure the right language for the targeted group. For example, consider the vocabulary and understanding of the target groups.

- Ensure there is a strong visual model of the output as a 'companion' document, which is easy to explain and understand. Standardise language, using the same terms (e.g. middle school/primary school) across the project to avoid any confusion
- Conduct market research. For example, under 25's may use Snapchat more than Facebook.
- Create a country specific plan. For example, Twitter may be widely used in one country and not another.
- Build in time to edit and cut information to make it more usable.
- Be creative; look at eye catching design, theatre ads, local radio stations.
- Introduce flexibility in addressing the target group. Source alternatives to text, introduce concepts through story telling or illustrations.
- Examine the diversity of platforms available such as online media, book shops, app stores, libraries.
- Develop guidelines for the application of the output.

Transferability

Transferability is dependent on the information and how it is designed. A balance needs to be found to make the output attractive and the information provided.

Dissemination can overshadow the exploitation and use of project products. *There can be a focus on creating* **visibility** *of the project and outputs which* **dilutes** *the emphasis on the* ***exploitation or use of the outputs*** *by the relevant target groups and stakeholders.*

Tips!

➢ Develop a transfer handbook providing guidance on how the outputs can be transferred and tailored to other contexts.

➢ Be aware from the beginning that you will need to view it from many angles and perspectives.

➢ Provide a glossary of terms for words with multiple or ambiguous meanings across countries.

➢ Innovative practices and methods should be transferrable.

➢ Consider using and developing tools that are contextually sound; highlight the rationale for their selection relevant to the target audience.

➢ Highlight the benefits of use.

There is the risk of outputs becoming generic with a loss of the bespoke nature during exploitation activities.

Thinking about a Dissemination Plan

As outlined above, dissemination and exploitation are not the same thing. However, thinking about how to ensure that your project results can be used by others can also inform a realistic and effective dissemination plan.

You will find that a good DISSEMINATION PLAN considers similar things to what is considered when formulating an EXPLOITATION PLAN.

Tips!

➢ Define target groups and develop key messages for each group, taking into consideration what you would like each group to know and how you can motivate them to engage.

➢ Key messages should be updated throughout the project as it develops, and as results start to appear.

➢ Analyse what media your stakeholders use both online and offline for their professional development, as well as their social media preferences.

➢ Ensure there is a consistent message across each partner country related to the project. Consider how the messages for each target group would motivate them to access further information.

➢ The visual branding of the project should be the same across all participating countries.

➢ Logos should be universally understood and checked for interpretation and similarity to other logos and branding.

➢ Care should be taken when using acronyms - ensure that they do not mean something else in another language.

➢ All products and messages should be presented in clear accessible language.

➢ Consider developing a newsletter with input from stakeholders who can bring further weight and support for the project.

➢ Develop a website and study the analytics to see what is working well. Track traffic to the website before, during and after information campaigns.

➢ Expand networks by attending relevant events with project specific business cards. Try and secure speaking slots/ stands at events and arrange to meet local politicians and policy makers.

➢ Hold masterclasses for policy makers and practitioners, keeping them short and to the point: look at breakfast meetings, lunchtime series of sessions, after work 'happy hour' sessions, which can fit into busy schedules and limit impact on daily work.

➢ Write a press release for each event, including an innovative or human interest angle – this will catch the attention of the media. Conduct interviews on local radio stations.

➢ Develop short, talking heads style videos with input from well-known local people or national experts in the field.

➢ Identify indicators for the exploitation and dissemination plan.

Conclusions

The three-day Transnational Cooperation Activity focussed on the exchange of ideas and practices implemented across project managed by the participants. Several key elements were highlighted:

- While you can have many tools and structures in place to support the development of your project, truly successful projects are underpinned by **strong relationships and collaboration** between the people and the partners involved. Don't underestimate the power of relationship building: it creates an open, motivated and cohesive team leading to successful project outcomes.

- There is no right or wrong way to do things: what works in one project may not work in another project. **Tools and approaches should be project-specific**, agreed and understood among consortium members.

- **It is advisable that tools are tested and agreed among the entire partnership**. It is important to keep in mind the resources available within participating organisations, to ensure that the administrative aspects are not overly time consuming for partners, particularly those with limited resources. Avoid duplication in tools or tools that are cumbersome to use.

- **Spending time on planning, selecting and developing tools** as well as **setting indicators and milestones** will save time in the long term and contribute to higher quality outcomes.

- **Communication underpins all aspects of the partnership**. There is a notable change from short-term communication involved in the development and submission of the application to project approval, as well as moving from somewhat aspirational and

ambitious agreements to real-life context where these need to be fulfilled. To manage this, each partner should employ familiarisation exercises among the consortium members to ensure that good relationships are formed from application development rather than feeling the need to start relationship building at approval stage.

- Project management requires careful planning and **the value of developing and adapting tools** will enhance buy-in and engagement from team members and stakeholders to ensure all participants are working towards the same goals.

- **Quality management is one of the key pillars** to ensure project success: it ensures the project is meaningful, fit for purpose and will contribute to enhanced exploitation of results.

- **Developing transnational outcomes requires clear planning from the outset** as well as the engagement of end users. Take into account the accessibility transferability, usability and adaptability of outputs with an important emphasis on protecting the innovative and unique nature of the outputs for use in local and transnational contexts.

- **Impact needs to be planned, measured and evidenced** to demonstrate the fundamental change as a result of the project outputs. It is important to keep in mind that just because there is an output, this does not mean there is an impact.

Examples of Tools used in European Project Management

E1

Monthly Report Template

Supplied by Guðrún Pétursdóttir http://inar.is/

E2

Responsibility assignment matrix

ITEM	OUTPUT/ACTIVITY	P1	P2	P3	P4	P5	P6
A1	Skype Meetings	LP					
A2	Risk, Quality & Evaluation					LP	
A3	Reports (inc. Budget Management)						
A4	Dissemination			LP			
O1	Workshops' Guide: Life Skills for Immigrants' Integration	LP					
O2	Citizens' Projects Guide: Immigrants in action with local support networks					LP	
O3	Recommendations: Local Actors for Integration			LP			
M1	PT	LP					
M2	ES			LP			
M3	IT					LP	
M4	PT	LP					
E1	International Final Conference: Local Actors for Integration (PT)	LP					
E2	National Conference: Local Actors for Integration (ES)			LP			
E3	National Conference: Local Actors for Integration (IT)					LP	

Supplied by Monica Correia https://projectgrowingtogether.wordpress.com/

Project Timetable Example

Project activity*	Oct M1	Nov M2	Dec M3	Jan M4	Feb M5	Mar M6	Apr M7	May M8	Jun M9	Jul M10	Aug M11	Sep M12	Oct M13	Nov M14	Dec M15	Jan M16	Feb M17	Mar M18	Apr M19	May M20	Jun M21	Jul M22	Aug M23	Sep M24
	2016			2017												2018								
A1 - Skype Meetings				A1								A1							A1					
A2 - Risk, Quality & Evaluation	A2			A2				A2				A2			A2				A2					A2
A3 - Reports (inc. Budget Management)			A3					A3				A3			A3			A3						A3
A4 - Dissemination	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4	A4
O1 - Workshops' Guide: Life Skills for Immigrants' Integration					O1	O1	O1	O1				O1	O1	O1										
O2 - Citizens' Projects Guide: Immigrants in action with local support networks									O2	O2	O2	O2	O2	O2	O2	O2	O2	O2	O2	O2	O2			
O3 - Recommendations: Local Actors for Integration		O3						O3	O3						O3	O3						O3	O3	O3
M1 - PT - Odemira	M1																							
M2 - ES - Lleida								M2																
M3 - IT - Follonica															M3									
M4 - PT - Odemira																								M4
E1 - International Final Conference: Local Actors for Integration (PT)																								E1
E2 - National Conference: Local Actors for Integration (ES)																								E2
E3 - National Conference: Local Actors for Integration (IT)																								E3

MONTHS

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Quality Evaluation Questionnaire

Partner Name : _____   Date: _____

Your collaboration with this evaluation is essential to us and the information here collected will be used for improving the project quality. Please answer all questions and be as detailed as possible with your suggestions of improvement.

Please score from 1 to 5, where 1 is the lowest and 5 is the highest.

1. Regarding the partnership and project coordination:

	1	2	3	4	5
Were you satisfied with all partners' participation level?					
Did all partners contribute at the project at the same level?					
Were you satisfied with your own contribution to the project?					
Were you satisfied with project coordinator?					
Were you satisfied with decision making procedures?					
Was decision making effective?					
Were you satisfied with the ability to mediate and satisfied conflicts?					
Was there respect for each partner's role?					
Was the project coordinator able to lead the project?					

2. How do you rate the project coordination overall?

Very Good ☐   Good ☐   Average ☐   Poor ☐   Very poor ☐

GROWING TOGETHER

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2.1. What were the strong aspects of the project coordination?

2.2. What aspects of the project coordination need improvement?

3. How do you rate the partnership overall?

Very Good ☐   Good ☐   Average ☐   Poor ☐   Very poor ☐

3.1. What were the strong aspects of the partnership?

3.2. What aspects of the partnership need improvement?

Thank you so much for your cooperation

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Risk Control Matrix

E4

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1. Risk Control Procedure

TYPE OF RISK	DATE OF OCCURRENCE	DESCRIPTION OF OCCURRENCE	PARTNERS INVOLVED	RESPONSIBILITY FOR PROBLEM SOLVING	CORRECTIVE MEASURES UNDERTAKEN	RESULTS OF CORRECTIVE MEASURES	POSSIBLE FURTHER ACTIONS/PREVENTIVE MEASURES	DATE OF END OF THE RISK	LESSONS LEARNT

Erasmus+

GROWING TOGETHER

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of the European Union

Growing Together:
Immigrants Empowerment as Local Citizens and Educators
Project nº. 2016-1-PT01-KA204-022867 | Strategic Partnerships 2016

Dissemination Report

Partner		Period:	Start date – End Date

A. Distribution of information (email shoots, links in other webs, social networking sites and file sharing platforms, etc.)

No.	Country	Type of activity	Target groups	No. of institutions	No. of persons	Date	Comments (effects, observations, problems etc.)
1							
2							
3							
4							
5							

B1. Project presentations (e.g. participation in dissemination events with national/regional/local audiences)

No.	Country	Type of presentation	Target groups	No. of persons	Date	Comments (effects, observations, problems etc.)
1						
2						
3						
4						
5						

B2. Project presentations (e.g. participation in dissemination events with international audiences)

No.	Country	Type of presentation	Target groups	No. of persons	Date	Comments (effects, observations, problems etc.)
1						
2						
3						
4						
5						

C. Articles and postings (in websites, blogs, newspapers, journals, books, etc.)

No.	Country	Type of presentation	Target groups	Date	Comments (effects, observations, problems etc.)
1					
2					
3					
4					
5					

D. Other activities

No.	Country	Type of activity / presentation	Target groups	No. of institutions	No. of persons	Date	Comments (effects, observations, problems etc.)
1							
2							
3							
4							
5							

Supplied by Monica Correia https://projectgrowingtogether.wordpress.com/

CREATIVE TOOL FOR EVALUATION

BACKPACK
WASHING MACHINE
WASTE BIN

Resources

1. HUMAN: FACILITATOR
2. MATERIAL:
- FLIP CHART X 3 PAPERS,
- FLIP CHART STAND OR YELLOW TAPE (TAPE THE FLIP CHART TO THE WALL)
- POSTID PAPER X 3 COLOURS
- PENS/MARKERS X 3 COLOURS
3. TIME: IDEALLY 90 MINUTES; MINIMUM 30-45 MINUTES (REFLECTION NEEDS TIME TO DEVELOP)

***

FEEL FREE TO BE CREATIVE AND ADAPT THIS TOOL TO YOUR OWN NEEDS/LIMITATIONS/CONTEXT/ENVIRONMENT
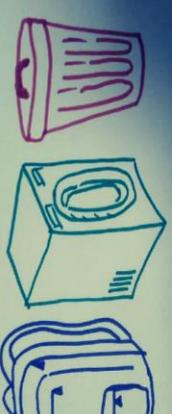
Introduction

EXPLAIN THE SECTIONS:

***

BACKPACK

CONTAINS THAT WHICH I WILL BRING BACK WITH ME (PROFESSIONALLY OR PERSONALLY)

***

WASHING MACHINE

CONTAINS THAT WHICH WAS INTERESTING, BUT STILL NEEDS WORK/CLEANING

***

WASTE BIN

CONTAINS THAT WHICH IS WASTE AND SHOULD BE AVOIDED/LEFT BEHIND US

...PREFERABLY...
SET THE BASIC RULES
(RULES CAN WARY, FEEL FREE TO ADD)

- NO RIGHT OR WRONG = EXPRESS YOURSELVES, YOUR CONTRIBUTION IS WELCOME AND VALUABLE
- DON'T WORRY ABOUT SPELLING
- WRITE CLEARLY SO THAT OTHERS CAN READ
- NOTHING IS WRITTEN IN „STONE" (WE CAN CHANGE OUR MIND)
- PARTICIPATION IS VOLUNTARY (IF PARTICIPANT HAS NOTHING TO SAY, THAT IS OK)
- CONTRIBUTE AND KNOW THE ANSWER TO THE QUESTION "WHY" IS THIS CONTRIBUTION IMPORTANT
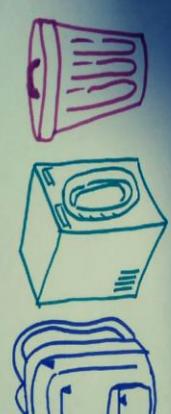
Contribution

MAKE SURE ALL PARTICIPANTS KNOW EACH OTHER AND FEEL COMFORTABLE TO SHARE THEIR THOUGHTS WITH THE GROUP.

ENCOURAGE PARTICIPANTS TO CONTRIBUTE. MAKE SURE THEY KNOW WHAT IS EXPECTED AND THAT THEIR CONTRIBUTION IS APPRECIATED.

THEY SHOULD WRITE THEIR TERMS (OR SENTENCES) ON POSTID PAPERS.

USE COLOURS TO DIFFERENTIATE THE ANSWERS (FOR BACKPACK-WASHING MACHINE OR WASTE BIN).

INSPIRE & CHALLENGE THEM WITH ADDITIONAL QUESTIONS (LEAD BY EXAMPLE)

YOU CAN ALSO USE NUMBERS OR ANY OTHER CREATIVE WAY - JUST MAKE SURE YOU CAN LATER RECOGNISE THE ANSWERS
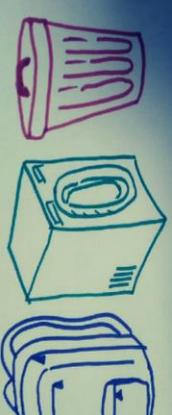
Reflection

START A DISCUSSION AND REFLECT ON THE ANSWERS THE PARTICIPANTS GAVE.

REMIND THEM THAT THE GROUP CAN CONVINCE THE FACILITATOR TO MOVE ANY ANSWER TO A DIFFERENT SECTION CONVINCED BY THE GROUP)

IF NECESSARY (= AGREED BY THE GROUP), SWITCH POSITIONS OF CERTAIN ANSWERS (E.G. SOMETHING COULD MOVE FROM WASTE BIN TO WASHING MACHINE)

USE DEMOCRATIC DECISION MAKING TO HELP THE GROUP REACH DECISIONS

(!) IMPORTANT (!)
FOR ANY CHANGE, WE HAVE TO KNOW "WHY" WE ARE DOING THE CHANGE
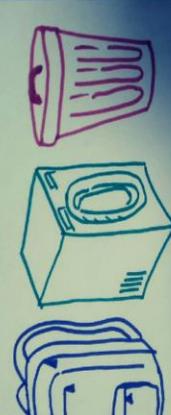
Analysis

PHOTO THE FINAL RESULTS

COLLECT ALL POSTID PAPERS AND GROUP ANSWERS INTO 3 GROUPS.

ANALYSE THE DATA SOMEWHERE NICE (ON SOME TROPICAL ISLAND, AS IS TRADITION)

...PREFERABLY...
SEND THE RESULTS TO THE PARTICIPANTS AND ASK THEM IF THEY AGREE
GIVE THEM AN REASONABLE DEADLINE AFTER WHICH CHANGES CANNOT BE MADE

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CERTI4Headmasters

Day 1: Reflection time

Observation in the school:

What was your first impression when you arrived at the school?

What age, grade, lesson did you visit?

How would you describe the classroom atmosphere?
What did you feel? What did you hear? What did you see?

How would you describe the teacher's body language?

Describe five actions of the teacher and of the students that contribute to learning.

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CERTI4Headmasters

Lunch:

Write down five questions that you want to ask the headmaster of the school.

Meeting with teachers and alumni:

What are the contexts of the students? (Rural, City, class size, level etc.)

How do the Slovakian teachers look at their school system?

How can the Slovakian teachers have impact in their schools?

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CERTI4Headmasters

Day 2: Reflection time

Morning: After the presentation of all partners, write down your first observations and facts you want to remember.

Make a SWOT analysis of your school

Strengths	Weakness
list your: + advantages + unique and low-cost resources + factors mean that you "get the sale"	list your: + disadvantages, limitations + what could you improve + factors lose you sales
Opportunities	Threats
list your: + chances to improve performance + good opportunities can you spot	list your: + external trouble for the business + obstacles do you face + what your competitors are doing

SWOT

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CERTI4Headmasters

Strengths	Weaknesses
Opportunities	Threats

Afternoon: Which best practice presented by the other headmasters impressed you the most? Explain why.

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Supplied by Yohann Fleury http://www.efcocert.eu/

Evaluation of Project meetings

Bull's eye as an efficient project meeting evaluation tool

•**organisation**: how well was the meeting organised?

•**participation**: to what extent did everyone actively participate?

```
 O
 1
 2
 3
 4
 5
 6
 7
 8
 9
10
 9
 8
 7
 6
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 1
 O
```

•**productivity**: How productive has this meeting been?

•**learning**:How much did you learn from attending this meeting?
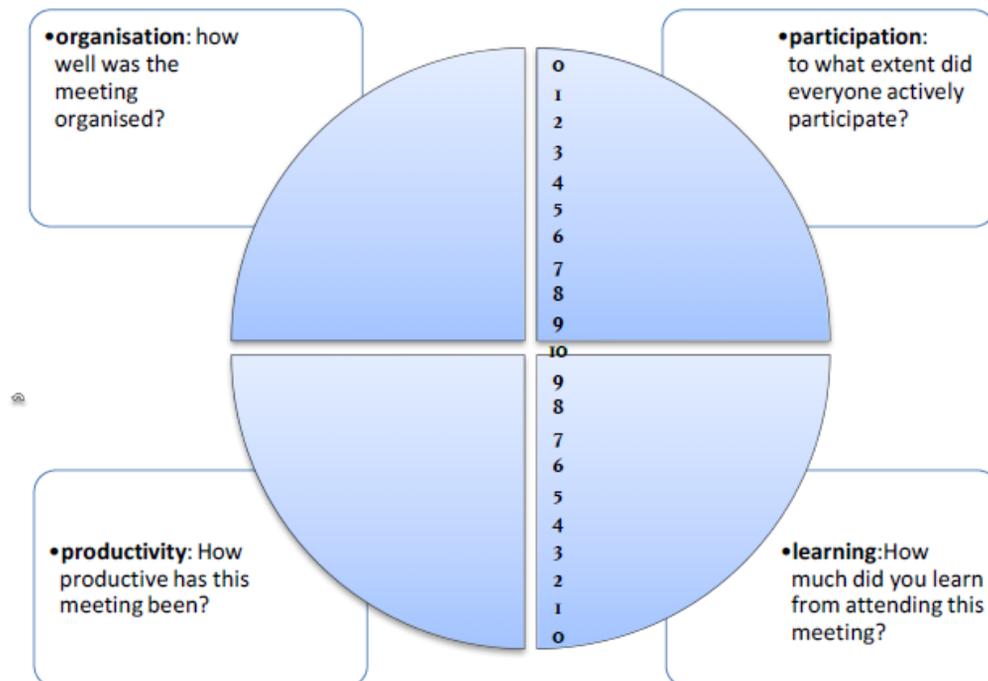
Every body is invited to mark or sticker four dots in the bull's eye to indicate how one values the project meeting on each of the qestions posed in the sectors of the cirkel. The middle is the highest score (10) the edge is the lowest (0). After the dots have been placed. One makes a picture and the evaluation data are processed. What is needed only is to have a talk about the meaning of the scores and the implications for next meeting (make minutes of this talk and keep them as project evaluation data in a file).

1. *At the end of the meeting write on paper what you consider the tasks to be done before the next meeting and share this with the other partners, so you all agree on the priorities for the next period.*
2. *Last but not least summarize the things you feel you have learned so far in the project. Keep this as an ongoing log throughout the project, so you can reconstruct your own learning process over the whole project duration. (use a nice notebook for this, so it will be a nice memory of your project experiences in the end)*

Supplied by Phil Rhebergen http://www.talenteducation.eu/en/

TALENT education

Progress Document European Projects

(Nr.....) Subject title:

Description in Application Form: ......

Output (according to Application Form)

(Advice: copy the exact formulation from the AF)

Deliverables:
a.
b.
c.
d.
......

State of the art in each city/partner/organization: SWOT analysis
(advice: try to mention 5 strengths/Opportunities and 5 Weaknesses/Obstacles)

Existing elements/strengths – each partner:	Existing weaknesses: - each partner:
Note: could be replaced by:	Note: could be replaced by:
What is done in each partner/etc? Some figures/dates about effect or impact? (advice: be specific)	What are the perspectives?
Opportunities: (each partner)	Obstacles: (each partner)

Goals for 2ⁿᵈ (3ʳᵈ) project year

1.
2.
3.
4.

Focus and priorities

Impact Evaluation: how do we monitor the development

- Horizontal: who/how
- Vertical: who/ow
- Longitudinal: what/how
- Transversal: what/how

Roles and stakeholders

Teachers:
Schooldirectors:
Students:
Experts:
National Educational Organisations:
City or Regional Authorities:
....
....

	We start with:
	Dissemination: how/when?
	Additional activities needed?
	Time schedule
	************

Supplied by Phil Rhebergen http://www.talenteducation.eu/en/

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Visual Project Timeline

E9

NUI Galway
OÉ Gaillimh

INCREMENTA Project Status

IN CRE MENTA
Innovation and creativity mentality advancement in SMEs

Oct 2018 M1   April 2019 M2   Oct 2019 M3   April 2020 M4   Oct 2020 M5

Activities

Dissemination and Exploitation

Project Management

01 Guidebook

02 Training

03 Online Platform

- 4 project meetings (2 online, 2 face to face)
- Dissemination Activities
- Exploitation Activities
- Drafting of materials
- Review and edit of materials
- Material Translation

- Draft of curriculum
- Draft of materials
- Review and edit
- Internal testing
- Translation
- National testing

- Game design
- Scenario definition
- Decision Tree
- Beta testing
- Translation
- Piloting

Multiplier events x 7

Outputs

PMP
Quality Plan
Dissemination Plan
Exploitation Plan
Reports

Creativity Unit
Collaboration Unit
Health Check

Training Plan
Training Materials
(under final review)

WIP Board Games
WIP Mini Games

Impact!

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Supplied by Kathryn Cormican: http://creativityandcollaboration.com/

Annexes

Building a Transnational Project Team

Inclusive Leadership:
https://inclusiveleadership.eu/il_theoreticalframework_en.pdf

Project Managing a Transnational Project Team

Knowledge Translation Resources and Tools:
http://www.cihrirsc.gc.ca/e/49443.html

Logic Model Development Guide:
https://www.wkkf.org/resource-directory/resource/2006/02/wk-kellogg-foundation-logic-model-development-guide

Theory of Change:
https://www.thinknpc.org/resource-hub/creating-your-theory-of-change-npcs-practical-guide/

Impact and Dissemination

Impact and Dissemination toolkit (European Commission):
https://ec.europa.eu/programmes/erasmus-plus/project-results/impact-and-dissemination-toolkit_en

Impact+ Toolkit (UK National Agency):
https://www.erasmusplus.org.uk/impact-and-evaluation

ImpactTool (Dutch National Agency):
https://www.erasmusplus.nl/en/impacttool-strategicpartnerships

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Mythbusting: European Project Management in Transnational Partnership Projects

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