EU-NET

REALISING, MONITORING & EVALUATING THE PROJECT

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

NOTE:
Always when you see this icon (👆), click on the text in front of it to learn more. Every time you see this icon (+) click on the button to check for more information. Also, if you want to navigate through the document, you can use the keyword menu at the top of each page.

REALISING, MONITORING & EVALUATING THE PROJECT

Toolkit on European Project Management for the Civil Society Organizations active in the Lifelong Learning Sector, part 2
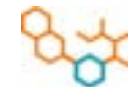
Co-editors: Agnieszka Dadak, Lorenza Lupini, Luca Bordoni, Marianna Labbancz, Carmen Malya, Jéssica Magalhães, Ingibjörg Benediktsdóttir, Hilmar Gunnarson

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DEAR COLLEAGUE!

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

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

The EU-NET team.
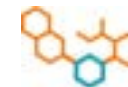
WHY HAVE WE DEVELOPED THIS TOOLKIT – AND FOR WHOM?

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

This Toolkit is primarily dedicated to the members, workers, co-workers, volunteers, and the adult learners of the Civil Society Organisations (CSOs) including informal groups, non-governmental organisations and other non-profit and not for profit organisations.

We believe it may be also useful for any public and/or private organisation; in general – a wide range of education – related organisations, institutions, and decision makers.

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

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

The **Toolkit** is divided into **two** parts:

1. **Part 1**, is related to **project planning and designing**. The aim of the first part of the Toolkit is to guide you from a project idea to a successful proposal. [1]

2. **Part 2**, you are reading now, is related to project **coordinating, monitoring and evaluating**. It is aimed to support the successful implementation of the European projects that have been (co-)funded by the European Union.
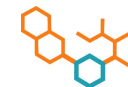
This Toolkit was developed by the practitioners in European project management, working for the civil society organisations in five European countries: Poland, Italy, Hungary, Portugal and Iceland, within the 28- months-long European project entitled *"EUropean NETworking as a method for further training and exchange of ideas in the lifelong learning sector"* **[EU NET]**.

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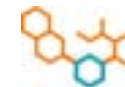
The context

The project is being realised by five civil society organisations from five European countries:

Name	Country	Website
Fundacja Alternatywnych Inicjatyw Edukacyjnych (Coordinator)	Poland	http://www.fundacjaaie.eu/
Cooperativa Sociale COOSS MARCHE ONLUS scpa	Italy	https://www.cooss.it/it
Folk High School Association Surrounding Budapest	Hungary	http://www.bknsz.hu/
Rightchallenge - Associação	Portugal	https://rightchallenge.org/en/
Húsavík Academic Center	Iceland	https://hac.is/english/

All the editors of this Toolkit are practicians in the field of European project management. All the organisations involved in this Toolkit development are the members of the FIRST Network (2).
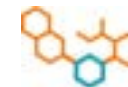
The EU NET continues and builds on the conclusions from the two preceding projects:

- The "First-time international projects realisers support network" [3] realised in the period 2018 – 2022 and

- the "Recommendations for international project managers competences recognition and validation for lifelong learning" [4], realised in the period 2019 – 2022.

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

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

1. The understanding of a "project"

Instead of a definition, we propose to characterise "a project" by several traits. You will find them described in the Toolkit 1.

2. The project cycle management methodology

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

Source: FAIE

The three phases relevant for the project planning and designing stage: **programming, identification** and **formulation** were already characterised in the Toolkit 1.
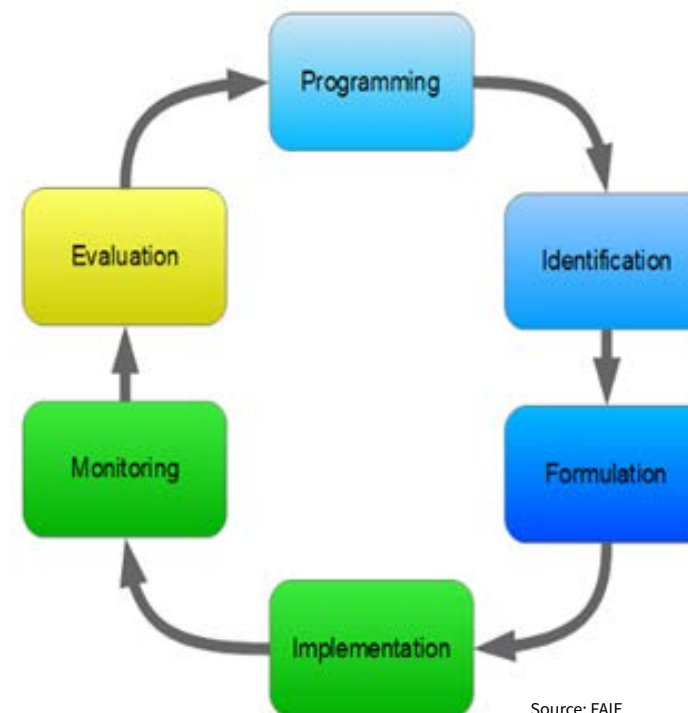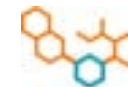
The context

The framework for this Toolkit - the assumptions

The 2nd part of the Toolkit you are reading just now relates to the following phases of the project realisation:

In the **implementation** & the **monitoring** phases:

- The project team realises the project according to the plan outlined in the successful project application.
- The project manager systematically measures/assesses the implementation of the project in terms of compliance with the plan - checking the degree of achievement of the planned goals (in the process of monitoring - continuous collection and analysis of information for management control and making current decisions).
- The project team implements corrections if needed.

In the **evaluation** phase:

- You determine whether the project has been successful and how successful it is.
- You assess the appropriateness, effectiveness and financial, substantive and technical efficiency of the implemented project.
- One of the objectives is using the conclusions from the evaluation to plan subsequent projects. If conducted well, reliably - you would have a better chance of not repeating the same mistakes.
- The basis for the assessment are the goals of the project defined during identification and formulation phases. You compare the achievement of your goals with the actual results.
- The evaluation is the basis for the new programming (conclusions from the completed project shall be the foundation of the next ones).

3. The perspective for this Toolkit (part 2, managing, monitoring and evaluating the project):

This part is written from the project manager perspective. By the "**project manager**" is meant:

- The person responsible for the overall project management and the overall success of the project,

- usually working for the project leader organisation, the coordinator (i.e. the one that submitted the project application, signed the Grant Agreement on the behalf of the partnership, receives the project grant and shares it with the partners).

The representative of the project partner at the stage of the project management and implementation is referred to as the project **national coordinator**.
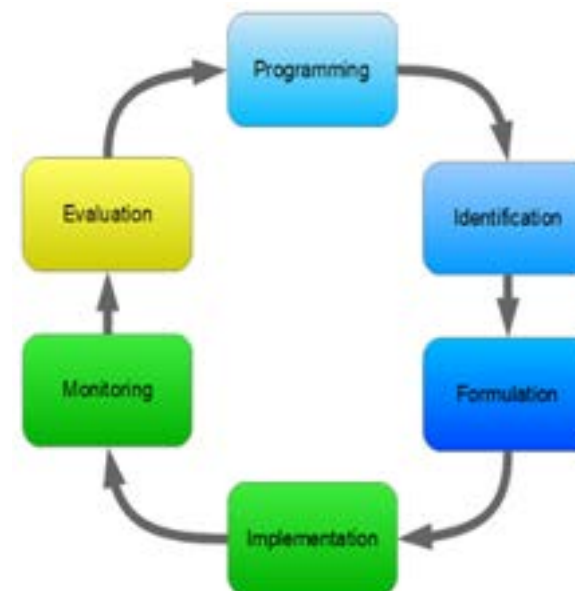
The context

Sum-up and worth to remember

Last but not least, here are **some final, general advice** for the project realising, monitoring and evaluating stage:

- *Experience shows that the most common reasons for the failures of the projects are: misunderstanding of the client's needs; poor strategic management; poor communication and flow of information; mistakes in the operational project management (at the project manager level). When the project implementation starts, you - as the project manager - still have some time to address those challenges. Just do it!*

- *The same as the project development and the project application – the project management can be well prepared and well planned. Ensure time for this. The better you plan the project implementation – the easier it will be to run a successful project. Planning is good and planning works...*

- *...Still, plans need to be flexible and need to be adjusted to the changing circumstances. Be prepared for changes, and do not fear changes. They are normal and common in the project implementation. Just react promptly.*

- *Take care of the good communication with the project stakeholders! Especially with the key ones: management of your organisation, your project team, target groups of your project and... the project officer. Openness for dialogue and good, uninterrupted communication have saved many projects "with troubles".*

🤞**Fingers crossed for your successful projects!**

Unit 1

TECHNICAL MANAGEMENT: EXECUTING THE PROJECT – AS PROMISSED IN THE PROJECT APPLICATION.

By Agnieszka Dadak, Foundation of Alternative Educational Initiatives

DOUBT

Learning Objectives

After studying this chapter, you shall be able to:

1. Understand how to execute the project having the project application as a "prescription" how to do it.
2. Understand how to successfully deliver the project.
3. Understand how to cope with the changes in the project.

The challenge addressed by this chapter:
To successfully realise the project - reaching the project goals within the planned time, budget, quality and in a good and fulfilling partnership cooperation.

Estimated time for studying this chapter and doing the practical activity: **3 hours**
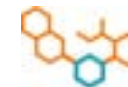
1. Project application as a "prescription": executing the project.

1.1. How (and why) shall I use the project application for project management?

? *How?*

As mentioned in the 1st part of this Toolkit, a well written project application is a ready "prescription" for the implementation:

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

What is more, the prescription for the project management is included.
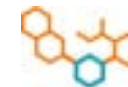
The project was selected for (co-)funding. Now it is the time to carefully **read the project** application, and make sure the project consortium (partnership) you have is really able to implement the project within all the resources assigned to the project (i.e. time, budget, people, etc.).

This is the last moment to resign, if any circumstances have changed significantly endangering the proper project realisation (for ex. the new board of the organisation do not support the project, some of the partners resigned, etc. Don't worry! Such situations happen rarely!).

The next stage is **signing the Grant Agreement** with the (co-)funding body. After you have signed it, the organisation you represent becomes obliged to deliver the project.

After signing the Grant Agreement, it is worth reading the project application again, in order to prepare the **implementation strategy**. If you are the project manager – you would need to present this strategy at the kick-off meeting, and discuss it with the project partners. If you are the national coordinator of the organisation being the project partner – you need to understand what is the project plan and the tasks your organisation is responsible for.
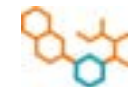
1. Project application as a "prescription": executing the project.

### 1.1. How (and why) shall I use the project application for project management?

? *Why?*

The project described in the project application is a kind of a "**promise**" you are giving to the funder.
The promise that you would contribute to address some challenges through certain activities, reaching the specific goals and results changing the present situation for the better. The project was chosen for co-financing, since the "promise" was evaluated as relevant, realistic, well planned, useful and beneficial for the end users.
By signing the Grant Agreement, the proposal becomes **binding**. The organisation you represent is now obliged to deliver what was promised.

The good practice is to realise the project the way it was described in the project application. You would need to refer to it writing the interim reports and the final report.

1. Project application as a "prescription": executing the project.

1.2. Possible changes in the project and how to handle them.

It may happen you will need to introduce some changes in the work plan. It can be done, if only justified and needed. What you **cannot** do – is changing the project goals (and results).

1.2.1. From the practical point of view: **Changes** in the course of the project/partnership:

→ Changes happen – or may just be needed/recommended. Important – do not fear changes, it is normal and common. What is also important – address the need for the change as soon as possible – do not try to wait out the situation.

→ Sometimes the changes are forced by an external situation/happening – such as, for example, the resignation of one of the project partners from being involved in the project.

→ Sometimes it is just reasonable to change the way you work – because some internal or external circumstances have changed. Some of the possible changes you have probably predicted making the risk analysis in the project planning and designing stage. (7)

1. Project application as a "prescription": executing the project.

1.2. Possible changes in the project and how to handle them.

1.2.1. From the practical point of view: **Changes** in the course of the project/partnership:

→ Many of us probably remember the pandemic time experience, when many changes in the realised projects were necessary – the most significant – exchanging the physical meetings and events into virtual ones.

→ Changes in the course of the project may be proposed by any project partner. The relevant decisions are formally taken by the Management Committee (chosen at the beginning of the project realisation; usually consisting of one representative of each of the project partners).

→ It is worth notifying the project officer about the planned change. There, you would probably be asked to justify the change. You would also need to refer to it in the interim/final reports – so keep a track of all the changes in the project.
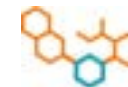
Unit 1

Technical management: Executing the project – as promised in the project application

1. Project application as a "prescription": executing the project.

1.2. Possible changes in the project and how to handle them.

1.2.2. From the 'technical' point of view: **Changes** that require and changes that do not require formal amendment to the Grant Agreement.

! From the "technical" point of view – some of the changes in the course of the project would require formal amendment to the Grant Agreement (GA), and some would not.

The most "typical" cases, requiring the formal amendment to the GA are:

- Changes in the legal, financial, technical, organisational or ownership situation of the project partner, including change in its name, address, legal representation, contact person.
- Change of the bank account number of the project leader (the one that receives the grant).
- Removal/change of the project partner.
- Changes in the project budget exceeding the frames set in the GA (for ex. Enlarging/diminishing the budget for a project result of more than 20%).
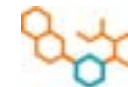
Exemplary changes that <u>do not require amendment</u> to the GA are:

➡ Minor changes in the project timetable (for ex. delaying some tasks, completing something faster).
➡ Minor changes in the project budget (lower than the frames requiring formal amendment, set in the GA).
➡ Changes in the project staff (assuming that the needed competences are still on board).
➡ Changing the venue of the planned meeting(s). (Observe! In some grant programmes a change of the meeting venue may be related to the budget change – as for ex. in the Erasmus+ projects).

⚠ Important:

Check the GA signed for the project to be sure what changes require an amendment and which do not require – the rules for the various grant programmes may differ. In case of any doubts – **consult** the project officer.

Keep **the record** of justifications/reasoning for the change(s). You would need this information to write the interim/final report.

Usually, the last amendment(s) to the GA may be submitted 30 days before the project ends. If you would be **late** – the amendment(s) may not be approved.
[You can read how the formal procedure of signing the amendment to the GA looks like in the Unit 2].

1. Project application as a "prescription": executing the project.

1.3. Non delivery of one/more elements of the project: Possible consequences and remedies.

+ **Non delivery** of the project, or its partial realisation usually means that one or more of the project goals were not reached (or not reached on a satisfactory level, wih a satisfactory quality and usefulness for the end users).

This means **not reaching** the planned indicators of the project results.
[If you need a reminder about what indicators are – have a look to the Toolkit 1]

It is worth knowing that such situations happen **rarely**. Most of the problems/troubles may be remedied/made up for, if only:

- The project partners are able to maintain good communication, and would search for solutions together;
- The project manager would keep a good communication with the project officer, to find the best remedy/solution.

+ *Do not stop to **communicate**; do not pretend **nothing is happening**, do not try to **wait out**!*
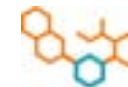
Here are some warning points for the project manager – that definitely **need reaction**:

- There are significant delays in delivering the project result(s);
- One/more of the project partners representative(s) do no respond to your e-mails/calls, or responds with a significant delay; the communication is weak;
- One/more of the project partners deliver work of a low quality.

If anything of this happens – **do not wait**. **React**. Consider changing the project partner, passing the tasks and the budget to an organisation that would deliver what is needed, with a high quality.

A tip/advice: The procedure for removing a non-delivering partner from the project consortium shall be described in the Partnership Agreement.

It is both possible to:

- Give the extra tasks and the budget to one of the existing project partners (checking first if its people have the necessary competences, and are able to deliver, more-less, on time);

- Invite a new project partner, offering the necessary competences and experience.

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2. What is there to manage in the European project?

[+] **2.1. Why does this project need to be realised?**

<u>Why does this project need to be realised?</u>
→ The answer to this question was, for sure, well elaborated in the project application (otherwise it might not be (co-)funded). All the project activities will be now aiming at addressing the identified challenges/needs. Just make sure you (and all the partners) understand well **for whom** you are working and **why**.

*To manage this work well, we would **recommend**:*

→ *To constantly **monitor the needs/challenges** you are addressing. Were there any changes here since you have submitted the project? Do you need to react to those changes? (For ex. there might be some changes in the relevant legal regulations introduced – making reaching your goals easier/harder; a new trend might have emerged – and maybe it would be useful to follow it, etc.).*

→ *To be in touch with and monitor, through the whole of the project realisation, the needs and expectations of your **target group(s)**.*
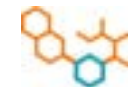
2.2. What goals will the project realise?

This is serious. The goals for your project were set to respond to the specific, identified needs and challenges.
Reaching the project goals = successful project.

- At the planning stage you have also set the **criteria** which would show you (and the funder) if the goals were reached – the **outputs/outcomes/results** and its **indicators**. You will be able to "prove" if the goals were reached by referring to these results and showing the indicators of these results (to get reminded what the results and indicators are, have a look to the Toolkit 1.

- To get reminded about the consequences of not reaching the project goal(s) have a look to the chapter 1.3.

  As the **project manager**, you need to ensure your project team reaches the goals by delivering the planned results/outputs/outcomes according to the indicators set.
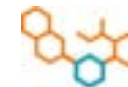
Unit 1

Technical management: Executing the project – as promised in the project application

[+] To manage this work well, we would **recommend**:

✓ At the **kick-off** meeting: make sure all the partners are aware of what the project goals are. Make sure you all have the same understanding of the project goals.

✓ Constantly **monitor** the level of reaching the project goals. Read the chapter about monitoring – prepare the monitoring tools well – use them – and draw conclusions. Refer to the level of the goals realisation at the project meetings. Plan remedies/updates if needed.

✓ Remember this part of management relates also to the **quality assurance**. The products (outputs) and services (leading to outcomes/results) you provide need to be of a good quality and really useful for your target groups, at least in all the countries involved in the project realisation (and best: for the European space in general).

✓ Read the chapter about the project **evaluation**, a part of which the quality assurance is. Prepare the evaluation tools well – use them – draw conclusions. Be honest and straightforward if you believe the result one of the partners delivers is of a low quality. It needs to be re-worked.
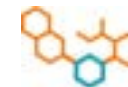
Unit 1

Technical management: Executing the project – as promised in the project application

2.3. What tasks need to be realised to achieve the goals?

Check the relevant part of the project application to get reminded about the **work plan**. The work plan of the project you are now managing is probably divided into several **work packages (WP)**. Each WP consists of one or several tasks – things to do. Usually each WP has assigned a project partner – as the main coordinator of the WP.

Your **role**, as the project manager, is to **monitor** the work and to **support** smooth implementation of all the project tasks. The WP you would be responsible for would be the one related to **project management**.

*To manage this work well, we would **recommend**:*

1. *At the **kick-off** meeting - go through all the WPs and tasks. Make sure all understand what there is to do. Check, if the division of tasks between the project partners is still valid and OK for everyone. You may introduce changes in the scope of responsibilities – if needed (you may introduce such changes anytime…).*
2. ***Monitor** the implementation of the planned tasks on a regular basis. Introduce corrections if needed.*
3. *Truly **delegate** the responsibility to coordinate the agreed WP to the responsible partner. You have the whole project to manage – spare your time for monitoring and reacting to the unexpected.*
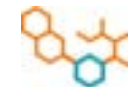
Unit 1

Technical management: Executing the project – as promised in the project application

2.4. How long would it take (what will be the project's time schedule)?

In the project application you will probably find the **Gantt chart** for the project, being a visual illustration of the timeline and the project tasks. Within the application you will also find the **deadlines** for delivering each work package/project result. This is your compass.

Changes in the project timetable are common. There is no need to worry about little delays, still – make sure it will not transform into serious delays.

Time management in European projects may be a challenge, because:

- The members of your project team would probably be involved also in other projects – where they also have some work to do.
- The partner organisations, whose people are working in your project, may have various priorities – and it may not be your project area.

You have probably planned some **time buffers** while writing the project application (or hopefully, the other person who wrote it did…). Now plan how to use them.

Unit 1

Technical management: Executing the project – as promised in the project application

To manage this work well, we would **recommend**:

1. **Monitor** the workflow, discuss it with the partners on a regular basis, and make necessary **adjustments** to the time table.
2. You may also **update** the distribution of tasks between the partners, if needed.
3. Do not get misguided by a "little delay". "Little delays" tend to grow. Monitor and react.
4. If you are responsible for managing more than one project at a time – you would need some extra planning. Keep an eye on the current **deadlines** for each project. Regularly look at the meeting minutes to check the agreed arrangements.

2.5. How much will it cost (what is the project budget)?

2.5.1. The overall budget management

Every project has its budget. The form of the budget may be different (detailed vs lump-sum). Usually, already at the project application stage, specific parts/amounts of the budget are **assigned** to the specific project partners.

Consequently, once again, your task as the project manager is now to read the project budget, and **re-check** if the scope of the tasks of each partner is appropriate to the budget assigned to this partner. It is worth also discussing this topic at the kick-off meeting.

If the project budget is a lump-sum one (i.e. there is no detailed budget, but just "packages" of money for various types of activities, for ex. salaries, travels, events) – it is worth making a more **detailed, internal budget**. Especially for the beginner in the field of European project management – it would be much easier to monitor and manage. It would also be easier to make possible changes in the budget.

Re-check the **(co-)funding level**. Are the partners expected to bring their own contribution? If so – in what form (i.e. financial, in kind, voluntary work) and how much (10%, 20%)? Make sure all the partners are aware of it.

In general, the information about the overall project budget and the amounts assigned to the project partners should be also enumerated in the **Partnership Agreement**.

+ **2.5. How much will it cost (what is the project budget)?**

2.5.2. Possible changes/adjustments in the budget

Typically, **adjustments in the project budget** may be needed when:

- The **scope of the work** assigned to some project partners changes (for ex. a partner resigns from some tasks – and some other partner takes them).
- Some **project purchases** were more expensive/less expensive than planned. Then you have overuse of some cost category/unused budget is some category. You may move the money from the budget category that was not fully spent to the one where you spent more than planned (for ex. the costs of the project meetings were higher than planned; but you have spent less than planned for the promotion, information and dissemination. You may move the unused budget where it is needed).
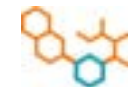
2.5. How much will it cost (what is the project budget)?

2.5.2. Possible changes/adjustments in the budget

+ *Have in mind:*

- There are some **budget categories** you cannot move the budget to/increase. Typically – this is the category of project management (it may be others!).

- You **will not get more money** from the granting body than stated in the Grant Agreement – no matter how much you would really spend.

- The **total approved project budget** may not mean/count the same as the **total grant for the project realisation**. If the level of co-financing is, for ex. 80%, and the project grant you received is EUR 100.000, the total approved budget would be EUR 120.000. In the final report, you would need to report spending EUR 120.000 or more. All the partners would need to contribute 20%.

- The good practice is the partners **equally contribute** to the project budget. For ex. if the own contribution required is 20% of the project budget, each partner brings this 20% extra on top of the grant amount assigned to the partner. If there is not enough money to cover some cost, the partners may jointly and severally agree to pass a part of their budgets to cover this cost.

2.5. How much will it cost (what is the project budget)?

2.5.3. Sharing the grant with the project partners: possible solutions.

Usually the grant for the project realisation, from the granting body, is paid to just one of the project partners – **the applicant** and **project leader**. Therefore the project leader holds the most responsibility for proper use of the grant, according to how it was planned in the project application.

There are **several solutions** for sharing the grant with the project partners. The most common are:

- Transferring the grant to the partners the same way the (co-)financing institution pays the grant to the coordinator. For example, if the grant is paid in tranches 40% - 40% - 20%, the leader passes the same 'percentage' of the assigned budget to each partner shortly after receiving the payment from the granting body.
- Advanced payment of some minor part of the grant (for ex. 10%), and later on refunding the costs of the partners, properly documented, according to the budget plan.
- Mixtures of the above mentioned solutions.

You need to discuss with the partners and **agree on the most relevant/acceptable solution**. Sometimes these decisions are taken already at the project designing stage (when the partners invited to cooperation sign some pre-cooperation agreement/the letter of intent).

2.5. How much will it cost (what is the project budget)?

2.5.4. Sharing the grant with the project partners: possible solutions

If it wasn't agreed before, it is worth to take into consideration:

➡ What is the financial situation of the project leader and the project partners? Will the partner be able to pre-finance its costs? For example, it may be difficult for some organisations just beginning cooperation on the European level. In this case – maybe bigger advance payment would be needed.

➡ Have you worked with the project partners before?

Adjust to the situation every time!

remember!

The last part/tranche of the grant is being paid as a "balance payment". It means it will be paid by the (co-)financing institution after accepting the final report from the project realisation. This needs to be reflected in the payment schedule to the partners.

2.5. How much will it cost (what is the project budget)?

2.5.1. Financial documentation for the European project:

- Proper financial documentation is needed to monitor and manage the project budget. It concerns financial reporting by the project partners.
- Usually the project manager (may be – in cooperation with a financial manager/accountant of the organisation) prepares the templates.
- The shape of the templates may be different for various grants. Check what would be most appropriate.

The most common financial documentation is:

➔ Job logs/timesheets

➔ Refunding templates

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Technical management: Executing the project – as promised in the project application

2.5. How much will it cost (what is the project budget)?

To manage this work well, we would **recommend**:

- 🟠 *Again: to **monitor** the budget spending on a regular basis. Refer to it at the "management" section of the project meetings.*

- 🟠 ***Be flexible**. The rules for the grant distribution are usually equal for all the partners, but sometimes an individual approach may be needed.*

- 🟠 ***Be transparent**. Use the project Management Committee to discuss budget issues wherever needed; develop the solutions together.*

2.6. Who are the project's stakeholders?

The same as for the project design stage – for the implementation stage we would also recommend you the **broad understanding** of the term '**stakeholders**'. In this sense, the stakeholders are all the persons/organisations/bodies that may influence the project – and that the project may influence.

In the next chapter addressing the leadership of the project, you will find more information about how to build relations with the stakeholders. Here we just provide some 'technical' information.

To make it more clear, you may divide the project stakeholders into two groups: the **internal** ones, and the **external** ones.

Cooperation with the key 'internal' stakeholders:

2.6.1. The project team

- Your project team will be composed of several persons, representing **various organisations from various countries**. You might have already read the bios of your team in the project application (but also new persons may join).

- Needles to write, you would represent **various organisational cultures**, you would have various work related habits and work styles. When the project starts, there is time to set the common rules for cooperation. The good place and space to do it – is at the kick-off meeting.
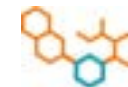
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Technical management: Executing the project – as promised in the project application

2.6. Who are the project's stakeholders?

Basic rules for cooperation:

At the kick-off you would constitute the Management Committee/Group, composed of one representative of each project partner. It would be the 'decisive body' in your project.

Additionally, we would **recommend:**

- *To agree on a '**netiquette**'. You would be working mostly remotely, online. How would you like to organise your communication? What would be your main communication channel (e-mail, some communicator, other)? How often would you meet online? Who, at each partner, is responsible for keeping the main communication?*

- *To set a **common working space** for the project team, where the project information can be kept and updated – accessible for all the project team members. It could be a common drive, cloud space or any other space and/or 'storage' that would work for you. See the ADDITIONAL RESOURCES section for some more tips and brief presentation of the exemplary project management supporting tools.*

- *To **stay in touch**, **communicate**, run a **dialogue**.*
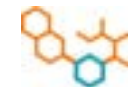
2.6. Who are the project's stakeholders?

How to compose the implementation team to have all the needed competences on board?

The general **composition of the project team**, along with the competences and experience offered by the staff of the involved organisations, was already described in the project application. Applications to some grant programmes would also include bios of the key involved persons.

At the realisation stage the specific persons may change, and be replaced by others. In this case, the competences of the 'new' team member must be similar to the person being replaced.

Usually, you would have **two main roles** in your project team:

- The **national coordinator** of the project – the contact person for the partner, who would also probably be the member of the Management Committee/Group. This role is about coordinating the delivery of tasks entrusted to a specific partner.
- Various **specialists**, who would deliver the merits work: educators, trainers, researchers, PR specialists, etc.

Anytime – you need to monitor if you have all the specialists, with all the needed sets of competences, for delivering each of the project tasks with a high quality.
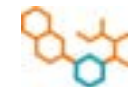
2.6. Who are the project's stakeholders?

The project partners: project meetings and overall communication

The overall 'technical' advice for communication within the project team was described above. You will find more about it, from the project leadership perspective, in the chapter 2.

What do you need to know about the project meetings?

- The **physical, face-to-face meetings** of the dispersed project team are one of the most important (and most pleasant, interesting and inspiring) parts of the project work. Most of the project managers we know (including us 😊) enjoy them a lot.
- If only possible (in terms of the timetable and budget), the physical project meetings are planned in every country the project partners come from, more-less – every half a year of the project realisation.
- Since the budget for the physical meetings, including travels, is usually limited – it is a good practice to meet **regularly onlin**e. The project team decides itself – when and for how long you would meet.
- Each meeting, to be effective and to not to become "loss of time", needs: The **agenda** (i.e. the meeting plan/programme); the **moderator** and **reporter**; the **minutes**.

Note: +
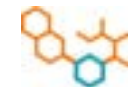
Unit 1

Technical management: Executing the project – as promised in the project application

2.6. Who are the project's stakeholders?

Few more words about the kick-off (and the subsequent meetings):

Kick-off meeting is the first meeting, initiating the project works. Here, the project team meets together for the first time. The good practice is that the agenda includes time for:

✔ Introducing the partner organisations and the key persons involved;

✔ Discuss the project implementation strategy (i.e. the project realisation, step by step) clarifying all the potential issues;

✔ Discuss the management issues (including monitoring, evaluation and dissemination);

✔ Agree on terms of cooperation, including the internal communication and information exchange;

✔ Constitute the project Management Committee/Group; - Approve the Partnership Agreement (if it wasn't done earlier);

✔ Set the ground for the 1st phase of the project realisation.
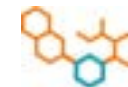
2.6. Who are the project's stakeholders?

Few more words about the kick-off (and the subsequent meetings):

At the **next meetings** you would be focussing on evaluating the stages of work already done, and planning the next stages of the project realisation. It is a good practice to regularly come back to the management issues (incl. monitoring, evaluation and dissemination) – to propose/decide on corrections, if needed.

The most common solution is to organise 1,5 – 2 days long meetings. It should be enough to discuss all that is needed to be discussed. The meeting **minutes** make the project documentation. The minutes include all the decisions taken during the meeting, including the deadlines.

Last but not least: Take care for some time together at each meeting, outside of the 'merits' work, in some more **informal context!** Apart from being professionals, you are also human beings. Human beings would like to learn a bit about the others they would be working with for the next 2-3-4… years. You may plan some short cultural/touristic elements in the agenda, including common lunches and dinner and not forgetting the coffee breaks.

**An yes, spending this extra time submerged in your smartphone
screen would be a waste of a very precious time⬤**
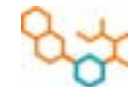
2.6. Who are the project's stakeholders?

+ 2.6.2 The granting institution /project officer: basic rules for cooperation

At the beginning of the project realisation you would receive a message introducing the **project officer** (PO) for your project. This would be your contact person at the granting body.

The role of the PO is to **monitor** the project implementation, but also to **support** the project realisers.

Stay in touch. Ask if you have questions regarding the execution of the grant agreement. Notify about the planned changes in the course of the project; especially those requiring formal amendment.

It is a good practice to invite your PO to the main project events. In practice – they attend rarely (they have many more projects to monitor) – but it is nice to invite, anyway.
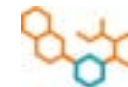
2.6. Who are the project's stakeholders?

2.6.3. The teams/members/volunteers of the involved organisations: what is worth to remember about and take care *about*

You are probably not working in your organisation alone. There are other workers, co-workers and volunteers, including the organisation management.

A new European project means some changes for all of them. They may be given new tasks, may have limited access to some of the organisation's resources they also need (for ex. an office, specialists, money), would need to re-organise their working hours, etc.

The same time the people of your organisation are also your 'resources', and it is good they become the allies of the project you manage!

Any change brings a deal of anxiety.
Therefore:

- Communicate the aims of the project, it's role for realising the organisations' strategy and the benefits for the organisation;
- Communicate in advance, when (and how much) common resources of the organisation you would need;
- Invite to contribute to the project.

This way you will be all able to identify synergies between the organisation's activities, and ensure optimal use of the competences and other resources.
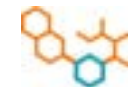
2.6. Who are the project's stakeholders?

2.6.4. One more internal group of stakeholders…

There is one more stakeholders group we would recommend you to approach as the 'internal' rather than the 'external' ones: the direct beneficiaries of your project.

You may say these persons are not directly involved in the project implementation – but aren't they, for sure?

These are **the people you are working for**. If the results you deliver will not be useful and attractive for them, fitted to their needs – you will not obtain a 'sustainable change' for the better.

And as you may remember from the 1st part of the Toolkit – the most valuable projects are the ones that bring sustainable change for the better.

To deliver useful, attractive, fitted to the needs and replicable project results

You need to be in touch with their future users. Invite them to test and evaluate the products and services your project delivers. Introduce updates, master your products/services using the feedback from the **end users**.
It is worth it!

2.6. Who are the project's stakeholders?

2.6.5. How to cope with it in a 'big' organisation and how to cope with it in a 'small' organisation (with few employees)?

In general – the **bigger organisation** the more resources it has (in terms of competences, experience, usually also – people, spaces, networks and financial liquidity). Great. But. There would also be more people 'competing' for the same resources. The internal team involved in your project may be bigger (for example, you may have a communication specialist, a financial manager, an evaluation specialist, etc. – who would be executing the relevant project tasks). Good communication and good planning is the key. The good, internal PR of the project helps😊

In the **small and little organisations** the communication and flow of information is, usually, easier. There are not so many of you, you are not working in various departments, people may be able to do various 'jobs' – depending on what's needed. But you may also have less resources available. As above - good communication and good planning is the key. Your networks will be extra precious – to arrange the resources you may not be having on board.

2.6. Who are the project's stakeholders?

+ <u>To manage this work well, we would **recommend:**</u>

- Set **clear rules** for cooperation and communication, understandable and approved by all the project team members.

- Do not resign from the **physical meetings**.

- Ensure an **agenda**, a **moderator**, a **reporter** and the **minutes** – for each project meeting (at least for each physical one).

- Communicate transparently, be **open for the dialogue**, and take care about the good flow of information.

- Remember the **granting body** representative is also your **stakeholder**.

Cooperation with the key stakeholders outside of the partnership (for ex. local/regional authorities, the media, etc. …)

This is, mostly, the matter of **dissemination**. Those stakeholders would need to be notified about the course of the project and the project results.

The communication and cooperation with them is usually planned within the **dissemination** – so have a look at this part of the project application. At the implementation stage it is worth considering, if there are any revisions/updates needed. After you re-define and name specific groups of the external stakeholders (for ex. the media, the local authorities, the educational institutions, etc.), you shall re-define:

→ The **channels and tools** you would reach each of this group through (E-mail/newsletter? Personal meetings? Social media?, etc.);

→ The **time schedule** – when will you be contacting each of these groups? How often? - The type/content of the message you would direct to each of these groups.

It is all usually included in the dissemination/ communication & information plan/strategy.
For more information have a look at the chapter about the dissemination.

Unit 1

Technical management: Executing the project – as promised in the project application

2.7. Who should be involved in the project realisation (who is the project team)?

2.7.1."Technical" team management: time – budget – quality once more.

Budget: The management tool is the project budget and all the relevant templates for the financial reporting. Plus the monitoring and process evaluation.

Time: The main management tool is the Gantt chart, monitoring and process evaluation.

Quality: Here the tool is the process and impact evaluation. And – the common sense😊
(We have all heard stories about the "intellectual outputs" composed of the content copied, directly, from some internet pages… Sure you understand this is plagiarism and fraud).

Unit 1

Technical management: Executing the project – as promised in the project application

2.7. Who should be involved in the project realisation (who is the project team)?

2.7.2. Dispersed team working remotely – "technical" issues: common space for documents, common working space, internal communication.

Have a look at the chapter about the project team, 6.1.1. for advice.

 Once more, you would need:

Clear communication rules.

Agreed netiquette.

Common working space.
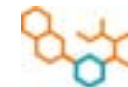
2.7. Who should be involved in the project realisation (who is the project team)?

2.7.3. "Technical" team management: documenting the work (job logs/timesheets, decisions and deadlines, etc.)

There are several types of documents that would support you at the team management.

Job logs/timesheets and **financial reporting templates** were already mentioned above. The purpose is to monitor and document the work done for the project and to prepare payments for the project partners.

The **meeting agenda** and the **meeting minutes**. Important, for monitoring the flow of work, to let everyone prepare for the meetings well, have it run in an orderly manner, and to document the decisions taken and the deadlines agreed.

+ You will find some exemplary templates for these in the "Resources and learning material" section.

2.7. Who should be involved in the project realisation (who is the project team)?

2.7.4. 'Technical team management': Partnership Agreement (PA)

This is an internal document that shall regulate all the most important rules for the partnership cooperation. Usually, you will not find any template for the PA in the grant documentation; sometimes you may find some guidelines on what it should include. **Just check it.**

Good practice and experience tells, the **PA shall include, as a minimum:**

- Names of the project partners, including addresses and legal representatives names.

- The aim of the partnership & the period of the project realization.

- The responsibilities and tasks of the project leader.

- The responsibilities and tasks of the project partners.

- Decision making and communication rules.

- Information about the project budget and the agreed distribution of the EU grant, including rules for financial management and financial reporting.

- Rules for internal monitoring and quality assurance.

+ **The PA shall be undersigned by legal representative of the project leader and the legal representatives of all the project partners.**

2.7. Who should be involved in the project realisation (who is the project team)?

2.7.5. Communication, relations, motivation, conflicts solving, working remotely in dispersed project teams etc.

Reading about the project team management by now, hopefully you don't have the impression that this is only a technical thing. It isn't. Equally important (some even say more important) is leadership. As the project manager, your role will also be to facilitate building relations and solving conflicts, to motivate, to encourage and support your team.

👆 Read the next chapter, 2, to learn more!
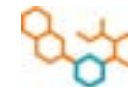
2.8. What could affect the project's outcomes (what are the risks)?

2.8.1. Risk monitoring – risk management – risk mitigation

The most probable and most significant risks related to the project were named in the project application, including the ideas for the risks mitigation.

Now it is time to go through the risks again and to **update the risk management plan**. It is recommendable to do it at the kick-off meeting. Then – just monitor the risks – and react accordingly.

(Yes, pretending the risk does not exist is not the right strategy😊)

What to do if the 'risk' becomes a
reality?
Invite the **project Management Group/Committee**, discuss the situation and the potential solutions. Plan what to do to minimise the negative impact on the project implementation. Plan and implement the relevant contingency plan. Keep checking if it is working. Notify the project officer if needed – you may ask for advice also there.

Some more information about handling the project risks you will find in the **chapter 3 of this Toolkit**.
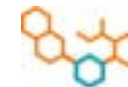
2.9. How will the project be communicated, promoted and disseminated?

2.9.1. The dissemination - recap

The project you are managing was co-financed with a European grant, an European "**public money**". This brings some obligations.

The money needs to be spent according to all the cost-effectiveness and 'best value for money' rules. The purpose of the (co-)funding is to contribute to address specific challenges/solve problems/satisfy needs. To achieve this, you need to deliver **valuable**, **useful** and **fitted to the needs** and **sustainable** results for your target groups.

Since you are working on the European level – it is expected the results will be **relevant** and useful **for many European countries and contexts**; they should also be replicable. Now you need to ensure **information** about these results will reach all the persons and entities that could make use of them.

This is the main purpose of the dissemination.
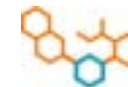
2.9. How will the project be communicated, promoted and disseminated?

2.9.1. The dissemination - recap

As any other element of the project implementation, also the **dissemination plan** was described in the project application. Now is the time to update it.

You may look to the <u>1st part of this Toolkit, chapter 4</u> to get reminded about the definition of the dissemination and the key features of the dissemination plan.

Here it is worth to differentiate a bit between the "**information and promotion**" activities and "dissemination".
The first term relates to informing about the project realisation, its activities and achievements in general. This process begins with the start of the project (or even earlier, with sharing the marvellous news your project was selected for co-funding😊).

Dissemination relates to communicating, promoting and making accessible the project results/outcomes/outputs: Notifying, all the products and services developed thanks to the EU (co-)funding, are now available for all interested.
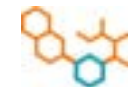
2.9. How will the project be communicated, promoted and disseminated?

2.9.1. The dissemination - recap

As any strategy, during its execution this one would require **updates and adjustments** in the course of the project, responding to the circumstances you encounter.

All the project partners are responsible for the project dissemination on the local, regional, national and European level.

As any element of the project implementation, the dissemination effectiveness needs to be **monitored, measured and evaluated** – according to the indicators set in advance. All the project partners shall be obliged to report their dissemination efforts.

Have a look to the next chapter to learn how to evaluate dissemination efforts
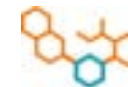
2.9. How will the project be communicated, promoted and disseminated?

In the guidelines – and later on – in the grant agreement, you will find a chapter about the visibility rules. This is related to informing about the source of the co-financing of your project.

Each Partner is obliged to promote the project and to disseminate its outcomes and results informing about the EU funding, applying **the proper EU emblem**, **statement** and **disclaimers** (translated into national languages, when appropriate).

It relates to all communication activities of the beneficiaries related to the project (including media relations, conferences, seminars, information materials, in electronic form, via traditional or social media, etc.), dissemination activities and any infrastructure, equipment, vehicles, supplies or major result funded by the grant.
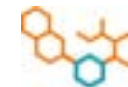
2.9. How will the project be communicated, promoted and disseminated?

2.9.2. Visibility rules - the European flag and the funding statement

At present, for most of the European grant programmes, the information must indicate the following disclaimer (translated into local languages where appropriate):

"Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or [name of the granting authority]. Neither the European Union nor the granting authority can be held responsible for them."

Check the guidelines for the specific grant programme/the grant agreement to be sure you are using the proper logo, statement and disclaimer!

Observe! The costs of the results not marked with the proper logo and statements may be regarded as ineligible.

Check the provided link for the exemplary visual identity rules 2021-2027.
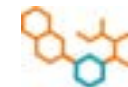
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Technical management: Executing the project – as promised in the project application

2.10. How will it be proved the project was a success (how will the project be monitored and evaluated)?

There are two interrelated processes you would need to take great care of while managing the European project: **Monitoring** and **evaluation** (including the process and impact evaluation).

Thanks to the **monitoring**, you will be able to react on time in case of any troubles and/or challenges in the project realisation and plan the necessary changes.

Thanks to the **evaluation**, you will be able to prove the project really reached its goals, and that it was successful.

Both monitoring and evaluation were planned at the project designing stage and described in the project application. Now it is time to implement them. Check what was planned in the project application and consider if it wouldn't be worth updating/supplementing the monitoring and evaluation plans.

Read the chapter 3 (Monitoring)

and the chapter 4 (Evaluation) of this Toolkit to better understand what you need to take care of and deliver.
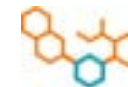
3. Project management as the project leader/coordinator & Project management as the project partner. Competences needed.

3.1. Project management: the project leader perspective.

Have a look at the **Toolkit 1, chapter 5** to get reminded, what are the main tasks of the project leader vs the project partner.

Technically, the **main, general responsibilities of the project manager** are to:

- **Monitor** that the project is implemented properly.
- Act as the **intermediary for all communication** between the project consortium and the granting body (i.e. the National Agencies and/or the European Commission).
- Inform the granting body about any **changes** concerning any of the project partners (address, legal state, financial state, ownership, organisational issues).
- Inform the granting body about any events and/or circumstances likely to **affect** significantly or delay the implementation of the project.
- Request and review any **documents or information** required by the granting body and verify their completeness and correctness before passing them on to the granting body.
- Submit the project results/outcomes/outputs and **report**(s) to the relevant platforms.
- Ensure that all **payments** are made to the project partners without unjustified delay.

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Technical management: Executing the project – as promised in the project application

3. Project management as the project leader/coordinator & Project management as the project partner. Competences needed.

3.2. Project management (coordination): the project partner perspective.

Technically, the main, general responsibility of the project partner is to do everything in its power to help the project leader fulfil its obligations under the grant agreement.

+ More specifically, the project partner needs to:

1. Accept that the partners are **jointly and severally liable** for carrying out the project in accordance with the grant agreement – and act accordingly.

2. **Accept the scope** of the project, it's aims, project results, to be delivered and the budget as described in the project application - – and act accordingly.

3. **Inform** the leader immediately of any events or circumstances likely to affect significantly or delay the implementation of the project and of any change in its legal, financial, technical, organisational or ownership situation.

4. Accept project aims and project results are **binding** for the project team and each partner – and act accordingly.

5. Guarantee that the common project aim will be seen to with all the necessary **care,** and **good communication** practices with the leader and the partner organisations will be maintained.

6. **Submit** to the leader, in good time, any information and documentation needed for reporting, control and monitoring purposes.

7. **Acknowledge** that the Leader alone is entitled to receive funds from the granting body and distribute the amounts corresponding with the partner organisation's participation in the project;

8. **Recognize** the rules for the project implementation and reporting, as described in grant agreement number and guarantee to follow them;

9. **Declare** that has not received any other EU funding to carry out the activity which is the subject of this project application.
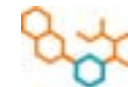
3. Project management as the project leader/coordinator & Project management as the project partner. Competences needed.
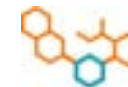
3.3. The competences for project management: technical, leadership, business & strategic (reference to Toolkit 1)

As you could read, the European project manager role means lots of work to do, lots of project implementation elements to manage. Which competences would be most helpful at the project implementation stage?

Get back to the Toolkit 1, chapter 5 in order to read more about the competences you would need to successfully manage European projects. There you will find the description of 30 key competences divided into 3 areas: technical, leadership and business & strategic.
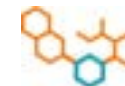
3.3. The competences for project management: technical, leadership, business & strategic (reference to Toolkit 1)

The below mentioned, indicative chart pictures, as a shortcut, which competences are most needed at which stage of the project planning and realizing:

Planning & designing	Implementing, monitoring & evaluating	Both
The Technical Competences		
General fund-raising skills,	Coordinating the team work,	English language skills,[1]
Organising and running Idea Workshops,	Financial management,	Dissemination strategy planning and realising,
Project planning and scheduling,	Internal communication,	Evaluation strategy planning and realising,
Budgeting and cost estimation,		

[1] For the project planning, designing and realization: In the project partnership, the partners may agree to use another language as the common one, for ex. French, German or other.
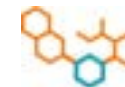
3.3. The competences for project management: technical, leadership, business & strategic (reference to Toolkit 1)

| Implementing, monitoring & evaluating	Implementing, monitoring & evaluating	Both
The Leadership Competences		
Motivation and Influencing,	Motivation by good exemplary practice,	Communication in the European CSO context
Empathy and Situational Understanding	Delegating project tasks,	
Team Building including volunteers,	Moderating meetings and events,	
Improvisation and agility,	Peer-to-peer counselling	
	Conflict resolution,	
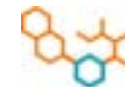
3.3. The competences for project management: technical, leadership, business & strategic (reference to Toolkit 1)

The Business and Strategic Competences

Applying to European funding programmes	PR and Marketing compliance	Insight into the CSOs reality,
Needs (and stakeholder) analysis		Insight into the situation in the involved partner countries
SWOT and Risk analysis		Synergies between national CSO projects and international CSO projects
		International and multilateral network in the CSO field
		Legal and regulatory compliance
		Intercultural competences
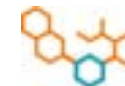
Checklist chapter 1:

	Yes	No
1. Are aware why are we doing this project	○	○
2. Understand who are we working for – who are our target groups and beneficiaries	○	○
3. Recognise and understand the goals of the project	○	○
4. Understand what tasks are assigned to each partner, and accepts them	○	○
5. Have agreed for the project timetable	○	○
6. Accept the project budget and its distribution	○	○
7. Understand who are the internal and external stakeholders for the project	○	○
8. Understand his/her role in the project team	○	○
9. Is aware about the risks	○	○
10. Understand his/her role in the dissemination and knows the dissemination plan	○	○
11. Understands how the success of the project will be measured	○	○

After reflecting on your answers, you can think about areas where you might want to improve or areas where you are already doing well.
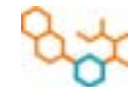
AMAZING

YOU ARE ON THE RIGHT TRACK
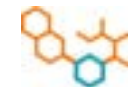
TRY AGAIN

If you have answered more 'NOs " then "YESes " – it may be worth arranging an extra meeting with the project team to clarify it all!

Unit 1
Pratical assignment:

We suggest you do one of the following activities:

Version/option 1:
If you are just about to manage an European project:

Version/option 2:
If you are not an European project manager yet, and are just preparing to/considering undertaking this role:

Find more information to complete the activity here!

Unit 2

Team management -
Communication, relations,
motivation, potential conflicts
solving

Marianna Labbancz, Folk High School Association
Surrounding Budapest

DOUBT

Learning Objectives

After studying this chapter, you shall be able to:

1. Recognize different dimensions of team
2. Consciously applies information about the operation of groups in order to effective project implementation

The challenge addressed by this chapter:
How to create an effective collaboration between people who have not worked together before.

Estimated time for studying this chapter and doing the practical activity: **1 hour for studying 40 minutes for the practical assignment.**

1. Why do we need to talk about the team work regarding the project implementation in international cooperation?

1.1 Introduction

Intentional project management requires people working **together toward a common goal, which leads to the successful project implementation.** In this chapter, we deal with the different aspects of a team and its effective operation.

1.2. Why is the team work during the project implementation a fundamental issue?

Teamwork refers to the *collaboration and coordination of a group of individuals to achieve a common goal or objective.* In a successful team, each member brings their unique skills, experiences, and perspectives to the table, and they are able to collaborate effectively to achieve the team's goals, which are the goals of the project as well. When individuals with a common interest, goal, attitude, need and perception come together, a team is formed.

I*ndividuals need to come and work together to form a team for the accomplishment of complicated tasks.*

In a team, **all team members contribute equally** and strive hard to achieve the team's objective which should be predefined.
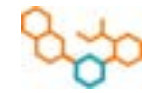
2. Some thoughts about a team and the team management

Before reviewing the types of teams, it is important to define exactly what we call a team. This definition describes exactly what will be discussed on the following pages. According to the University of Washington "*TEAM is a group of people with different skills and different tasks, who work together on a common project, service, or goal, with a meshing of functions and mutual support.*"

2.1. The types of teams

There are many different models according to the operation of different teams. We are going to discuss the **five** most common ones. Teams can be formed anywhere, anytime whenever the task is a little difficult and complicated. Let us understand the various types of teams in detail.
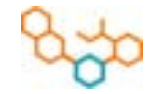
2. Some thoughts about a team and the team management

2.1. The types of teams

1. Functional team

Functional team includes members of the same field. Working within this team, different responsibilities can be shared with other members. **The functional team has leaders or supervisors to whom members report and who designate responsibilities.** Organizations commonly use functional teams, which require communication and trust. This type of team may be beneficial to contribute to and prioritize workplace culture.

Example:

An organization establishes a team in order to prepare a communication campaign. The members of this functional team have a strong understanding of this campaign and already have the information to make decisions. Team members then use analytics to determine the most effective campaign.

Unit 2
Team management - Communication, relations, motivation, potential conflicts solving

2.1. The types of teams

2. Cross-functional team

Cross-functional teams share similarities with functional teams, with the difference being that **team members come from various department**s. These teams are useful for jobs and projects that require different expertise and viewpoints. **These teams function best when supervisors and team leaders prioritize communication.** Leaders typically delegate responsibilities to members depending on their individual skill sets.

Example:

An organization wants to develop a new communication strategy. This organization creates a cross-functional team with members from every field of activity. The members of this team analyze their departments to determine the content of the communication strategy.

2.1. The types of teams

3. Self-managed team

In self-managed teams, *the* **team members work within the same organization and work together to achieve a common goal.** These teams are self-contained and do not require the same oversight as other types of teams. Self-managed teams share leadership and responsibility. **Self-managed teams can be more innovative because team members can be more creative.** Self-managed teams are more likely to quickly reach consensus and decide how to implement ideas effectively.

Example:

A self-managed team helps members succeed because all members can collaborate to determine a solution. Such a team can be useful for finding innovative solutions and during brainstorming.

2.1. The types of teams

4. Troubleshooting team

When in a bigger organization issues arise, the troubleshooting team should find solutions for those issues. The goal is to improve processes for organizations. The team requires strong communication skills **to discover solutions for complex obstacles.** This team makes recommendations to affected colleagues working on the related area, who then implements the recommendations. This solution is more suitable for larger organizations, where several people work in a special area.

Example:

An organization wants to know how to increase the efficiency of its computer systems. It establishes a troubleshooting team of IT experts, so experienced members apply their specialized skills to the situation. The leader of the organization can then decide which changes to make based on what the team finds during their troubleshooting.

2.1. The types of teams

5. Project team

Project teams **work on specific projects of the organization. Members of project teams typically have different knowledge and skills**. They perform tasks depending on their abilities. These teams have project leaders who assign responsibilities and monitor work.

Example:

A team needs to create a new organization website. Members from different areas (people deal with marketing, web development, different project implementation) collaborate to create the website. Everyone on the team continues to work together on this project until its completion.

2. Some thoughts about a team and the team management

2.1. The types of teams

All of the presented team types, the project team and the cross-functional team seem **the most favorable for the implementation of international projects.** In the frame of these types of teams the members use different knowledge and skills, and this complexity is very important during the project implementation. The self-managing team can also be suitable, because it can be used for eliciting innovative ideas. The functional team and the troubleshooting team have very limited synergic effect regarding international projects, it rather can be applied at bigger organizations.

In addition to all these team types, **the two most accurate** are the temporary team and the permanent team.

- **Permanent teams** - These teams perform on a permanent basis and are not dissolved once the task is accomplished.
- **Temporary teams** - Unlike permanent teams, temporary teams lose their importance, once the task is accomplished. Such teams are usually formed for a shorter duration either to assist the permanent team or work when the members of the permanent team are busy in some other project.

From the point of view of international projects, project implementation teams are more temporary teams, as their work ends when the project is completed.

Unit 2

Team management - Communication, relations, motivation, potential conflicts solving

2. Some thoughts about a team and the team management

2.2 Team development stages

Teams go usually through stages of development. The most commonly used framework for a team's stages of development was developed in the mid-1960s by Bruce W. Tuckman. According to his descriptions of Forming, Storming, Norming and Performing 1 provide **a useful framework for looking at your own team. Each stage of team development has its own recognizable feelings and behaviors.**

These stages in the development are not linear. Especially if we take into account the aspect that the implementation of international projects usually lasts between 12-36 months. It would be expedient if the performing, the most profitable period, would have the longest period of the teams. **We often cannot really speed up the organic development of teams**. However, with the effective use of some tools, the other three periods can perhaps be shortened. You can read about this in the following sections.

Stage 1.: Forming

Feelings	**Behaviors**	**Team Tasks**
During the Forming stage of team development, **team members are usually excited to be part of the team and eager about the work ahead.** Members often have high *positive expectations* for the team experience. At the same time, they may also feel some *anxiety*, wondering how they will fit in to the team and if their performance will measure up.	Behaviors observed during the **Forming stage may include lots of questions from team members**, reflecting both their excitement about the new team and the uncertainty or anxiety they might be feeling about their place on the team.	The principal work for the team during the Forming stage is to create a team with clear structure, goals, direction and roles so that members begin to build trust. A good kick-off process can help to ground the members to clarify the goals, the aims and the tasks of the project. During the Forming stage, much of the team's energy is focused on defining the team so task accomplishment may be relatively low.

Unit 2

Team management - Communication, relations, motivation, potential conflicts solving

2. Some thoughts about a team and the team management

Stage 2.: Storming

Feelings

As the team begins to move towards its goals, members discover that the team can't live up to all of their early excitement and expectations. **Their focus may shift from the tasks at hand to feelings of frustration or anger with the team's progress or process.** Members may express concerns about being unable to meet the team's goals. During the Storming stage, members are trying to see how the team will respond to differences and how it will handle conflict.

Behaviors

Behaviors during the Storming stage may be less polite than during the Forming stage, with **frustration or disagreements about goals, expectations, roles and responsibilities being openly expressed**. Members may express frustration about constraints that slow their individual or the team's progress; this frustration might be directed towards other members of the team, the team leadership or the team's sponsor. During the Storming stage, team members may argue or become critical.

Team Tasks

Team Tasks during the Storming stage of development call for the team **to refocus on its goals, perhaps breaking larger goals down into smaller, achievable steps. A redefinition of roles** and tasks and clear communication can help team members past the frustration or confusion they experience during the Storming stage.

Unit 2

Team management - Communication, relations, motivation, potential conflicts solving

2. Some thoughts about a team and the team management

Stage 3.: Norming

Feelings

During the Norming stage of team development, **team members begin to resolve the discrepancy they felt between their individual expectations and the reality of the team's experience.** If the team is successful in setting more flexible and inclusive norms and expectations, members should experience an increased sense of comfort. **Team members feel an increasing acceptance of others on the team, recognizing that the variety of opinions and experiences makes the team stronger and its product richer.** Constructive criticism is both possible and welcomed. Members start to feel part of a team and can take pleasure from the increased group cohesion.

Behaviors

Behaviors during the Norming stage may include members making a **conscious effort to resolve problems and achieve group harmony.** There might be more frequent and more meaningful communication among team members, and an increased willingness to share ideas or ask teammates for help.

Team Tasks

During the Norming stage, **members shift their energy to the team's goals** and show an increase in productivity, in both individual and collective work.

2. Some thoughts about a team and the team management

Stage 4.: Performing

Feelings

In the Performing stage of team development, **members feel satisfaction in the team's progress.** They share insights into personal and group process and are aware of their own (and each other's) strengths and weaknesses. Members feel attached to the team as something "greater than the sum of its parts" and feel satisfaction in the team's effectiveness. Members feel confident in their individual abilities and those of their teammates.

Behaviors

Team members **are able to prevent or solve problems in the team's process or in the team's progress.** A "can do" attitude is visible as are offers to assist one another. Roles on the team may have become more fluid, with members taking on various roles and responsibilities as needed. Differences among members are appreciated and used to enhance the team's performance.

Team Tasks

In the Performing stage, the team makes significant progress towards its goals. **Commitment to the team's mission is high and the competence of team members is also high.** Accomplishments in team process or progress are measured and celebrated.

Unit 2
Team management - Communication, relations, motivation, potential conflicts solving

2. Some thoughts about a team and the team management

Stage 5: Termination/Ending

Some teams, *especially the managing teams of international projects*, come to an end, when their work is completed. While this stage is not part of the original model, it is important for any team to pay attention to the end or termination process.

Feelings

Team **members may feel a variety of concerns about the team's impending dissolution. They may feel sadness or a sense of loss about the changes coming to their team relationships.** And at the same time, team members may feel a sense of deep satisfaction at the accomplishments of the team.

Behaviors

During the Ending Stage, some team members **may become less focussed on the team's tasks and their productivity** may drop. Alternatively, some team members may find focussing on the task at hand is an effective response to their sadness or sense of loss. Their task productivity may increase.

Team Tasks

The team needs to acknowledge the upcoming transition. During this stage, the team should focus on three tasks:

1. **Completion** of any deliverables and closure on any remaining team work;
2. **Evaluation** of the team's process and product, with a particular focus on identifying "lessons learned" and passing these on to the sponsor for future teams to use;
3. **Creating a closing celebration t**hat acknowledges the contributions of individuals and the accomplishments of the team and that formally ends this particular team's existence.

By experiencing these stages during project implementation, the team members are enriched with professional implementation relationship-building experience, which, based on it, means significant advantages during the implementation of a subsequent international cooperation.

2. Some thoughts about a team and the team management

2.3. Types of a team management styles

Individuals who manage teams naturally have varying management styles.
Factors that may **impact which type of team management style is used include:**

- A person's temperament
- Character traits
- The needs of the individuals on the team
- The volume of work that needs to be completed

Team management styles can be **changed to better align with the project goals or based on the team of people you're managing. Each style has both advantages and disadvantages** depending on how it's used. Consider the following styles and determine which one fits your needs:

- **Persuasive**
- **Authoritative**

- **Consultative**
- **Transformational**

- **Collaborative**
- **Laissez-faire**

- **Democratic or participative**

Unit 2

Team management - Communication, relations, motivation, potential conflicts solving

2. Some thoughts about a team and the team management

Persuasive

In persuasive management, you'll typically **be the expert of the subject matter you're leading in.** You'll persuade your team that your objectives and ideas are good and that their work is important. This style can also be helpful if you're managing upwards, where you'll provide professional thoughts and opinions to more senior colleagues.

When to use it:

To make quick decisions, increase productivity, and be transparent in their decision-making process.

What to be mindful of:

There may be **situations that lack participation and agreement** which could create a stalemate.

Unit 2

Team management - Communication, relations, motivation, potential conflicts solving

2. Some thoughts about a team and the team management

Consultative

As the name suggests, *coordinators consult with team members and use their skills to seek solutions, create plans, and make decisions.* This management style focuses on team building, where the partners participate more in the decision making process. With consultative team management style employees feel valued and respected.

When to use it:

Partners may find it *easier to accept decisions that they disagree* with if they were consulted first.

What to be mindful of:

There may be a *personality mismatch if the team doesn't work well together.*

2. Some thoughts about a team and the team management

Collaborative

In collaborative management, it aims to bring executives, **project coordinators and staff to work and take responsibility together.** This style can spark personal and professional fulfillment making it more common for great work to be produced regularly. It's also typical for information to be shared organically and there would be open communication between team members of all levels.

When to use it:	What to be mindful of:
Decision making is a collaborative effort.	Using this style too often can *create* **challenges, such as lack of leadership**, direction, and inability to make decisions as a group.

Unit 2

Team management - Communication, relations, motivation, potential conflicts solving

2. Some thoughts about a team and the team management

Democratic or participative

Using a democratic style of management includes partners in the decision making process by listening to ideas, noting suggestions, and spending time going through ideas together. **The coordinator listens to the partners and integrates their ideas with its own.**

When to use it:

This style is most effective *f***or long-term decisions.**

What to be mindful of:

With this style there may be inefficiency, lack of structure, and **decision making may take longer when more ideas are formed.**

Unit 2

Team management - Communication, relations, motivation, potential conflicts solving

2. Some thoughts about a team and the team management

Authoritative

Coordinators who know what they want and have a **clear and focused vision may rely on authoritative management tactics. In this style, managers solely make the decisions that everyone must follow.**

When to use it:

This style is efficient **when there may be a crisis and when decisions need to be made quickly.** Managers may use authoritative management to set clear expectations.

What to be mindful of:

Some partners may experience feelings of **micromanagement and lack of control.**

2. Some thoughts about a team and the team management

Transformational

Transformational leadership is **driven by motivation, encouragement, and innovation.** Coordinators will typically encourage partners to reach and set goals that may be out of their comfort zone. Partners are also included in decision making.

When to use it:

Transformational management strategies **encourage creativity, a more positive working environment,** and a strong threshold for adaptability and change.

What to be mindful of:

Transformational management **can lead to employee burnout and lack of clear focus** because of the constant changes.

Unit 2

Team management - Communication, relations, motivation, potential conflicts solving

2. Some thoughts about a team and the team management

Laissez-faire

Laissez-faire is a hands-off management style **where managers act more similarly to mentors than leaders**. Coordinators communicate expectations, goals, and more, and then leave the team to accomplish those objectives without daily guidance. Managers are still present, and available for questions and guidance, but the *daily decision making is being done by the employees.*
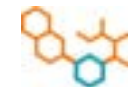
When to use it:

It can also create a **creative and autonomous work environment.**

What to be mindful of:

With a hands-off approach, **employees may feel neglected** and feel a lack of guidance.

+ **It is quite natural that, as a beginner in project management, you would need some time to 'discover' your management style. You may be testing various solutions.**

3.Characteristics of Good/effective team

3.1. Key skills for team management

Team management requires a certain skill set that involves a mix of **technical and personal skills**. Effectively managing a group of people requires adaptability, flexibility, and excellent communication skills as you work with varying types of people and groups.
In this chapter, we analyze the skills required for international project coordination.
During the implementation of international projects, these skills must be performed by the project coordinator.

1   Delegation

Delegation is one of the most important team management skills. The role of the team leader is to find the best people for the given task and utilize every partner effectively. While the success of individual team members depends on personal performance, the coordinator's success, which is the success of project implementation, depends on whether s/he gives the team members adequate responsibility and whether she trusts them to do their work. **Team management requires a shift in mindset, from a player on the field to a coach guiding the game.** Skilful leaders identify teammates' strengths and weaknesses, evaluate workloads, and split tasks among team members accordingly. If necessary, then team managers can reassign roles as the project progresses, but it is important for every team member to receive clear duties and sufficient workloads.

3.Characteristics of Good/effective team

3.1. Key skills for team management

2 **Emotional Intelligence**

Team coordinators connect and correspond with individuals of various backgrounds, responsibility levels, and personalities on a daily basis. Possessing a **high level of emotional intelligence and exceptional empathy enables managers to navigate situations with grace and dignity, ensuring mutual respect.**
Emotional intelligence is one of the most pivotal team management soft skills. Defined as the ability to accurately identify and respond to the expression of feelings, emotional intelligence guides leaders in interactions with colleagues.
Strong emotional skills prevent conflict and accelerate relationships.

3 **Boundary Setting**

One of the most often overlooked team management competencies is the ability to set boundaries. **Team leaders walk a fine line between developing personal relationships and remaining professional.** While they might develop closer relationships or stronger rapport with certain team members, when it comes time to work, all teammates are on equal footing and receive fair treatment. Though friendly and approachable, great team leaders set expectations and follow-through on results.

Unit 2

Team management - Communication, relations, motivation, potential conflicts solving

3.Characteristics of Good/effective team

3.1. Key skills for team management
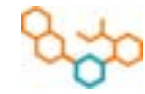
4 **Organization**

Organization skill is an **essential skill for team leaders,** and one of the most pivotal cross-functional team management skills. Project implementation while cooperating with the partners consists of many moving parts and individual contributions, and without a well-ordered system, leaders may overlook important details.
Well-organized team leaders keep teammates on task, and operations running smoothly. The resulting sense of calm and control inspires confidence and puts collaborators at ease. Each manager needs to have a preferred organizational method, such as spreadsheets, to-do lists, etc.

5 **Team Building**

Team building is a continuous and conscious process. It is important to constantly monitor which stage of team development the group is currently in. It is necessary to help this process or - if the process is in the storming phase - to slow it down. While some colleagues click and get along right away, most groups need help with communication, coordination, recognizing each other's skills, and appreciating unique personalities and perspectives.

3.Characteristics of Good/effective team

3.1. Key skills for team management

6 **Communication**

Communication is critical to team success.
Regular communication builds trust and develops rapport between managers and employees. Since teamwork involves groups of individuals performing tasks simultaneously in hopes of reaching a unified goal, it is important that every partner knows where others are in the process.

When the team leaders fail to convey important details, adequately explain instructions, or lay out clear expectations, partners under-perform. **Lack of communication is a common cause of frustration, but establishing firm lines of communication makes teams more efficient and team members feel more valued and confident**. Selecting the proper means of communication is also important. For instance, if there are no pressing updates, an instant message might suffice rather than a meeting.

A good leader **sets standards for communication and models** those behaviors for the team. Setting a professional tone in conversations and sharing information promptly encourages employees to follow suit.

3.Characteristics of Good/effective team

3.1. Key skills for team management

7 **Decision Making**

Team leaders, coordinators during international cooperation, are responsible for the most effective implementation of their projects. **Due to the nature of the international project implementation, the coordinator always asks for suggestions from the team members, or the team, the partnership, makes the decision itself. The team leader must develop the appropriate methodology in order to guide the partnership's decisions and proposals in the right direction.** It is necessary to know in the meantime that the leader must have the appropriate level of self-confidence in order to make a decision.

8 **Constructive Criticism**

The ability to tactfully deliver constructive criticism is one of the most important performance management skills. Hearing feedback can make folks defensive, yet a skilled manager disarms recipients and delivers messages successfully.

3.Characteristics of Good/effective team

3.1. Key skills for team management

9 Problem Solving

Problem solving is a **crucial abilit**y for any team leader.

In an ideal situation, staff use good judgment to solve problems without managerial input, but realistically, most need to observe conflict resolution in action to identify the optimal approach. Plus, team leaders usually have more experience than teammates and exhibit the ability to consider issues from multiple perspectives, enabling them to choose more practical solutions.

You can develop problem solving skills by doing problem solving activities, as well as digital escape games and online murder mysteries.
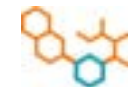
3.Characteristics of Good/effective team

3.2. Effective team management is important -summaty

Effective teamwork involves **open communication, mutual respect, shared responsibility, and a willingness to work together** towards a common purpose.

Some key factors that contribute to effective teamwork include **clear communication, well-defined roles** and **responsibilities**, a shared understanding of goals and objectives, and a supportive and inclusive team culture.

It is also important for the team members to have **trust and respect** for one another, and to be willing to give and receive constructive feedback.

Overall, teamwork is an essential aspect of success in project implementation, and it requires strong communication, collaboration, and a shared commitment to achieving common goals.

For the leadership skills related directly with European project management - refer to the 1st part of the Toolkit, chapter 5. There you will find 10 most relevant leadership skills shortly described.

4. Some essential tips for effective team management

A good manager is an important part of a team's success. They regularly keep the team motivated, on track, informed of company milestones and goals, and ensure everyone is satisfied and contributing towards the bottom line.

Here are a few tips for how to effectively lead your team:

Practice good communication skills

- Practice active listening
- Deliver clear message
- Clear up misunderstanding

Clarify roles, responsibilities, and accountabilities

- Identify the roles of each team member
- Align each member's strengths with their assigned role
- Give each member ownership of their role and tasks
- Respect each-other's roles

Have a TEAM mindset rather than an I mindset

- Focus on what's best for the team
- Collaborate with team members
- Define team goals and expectations
- Appreciate each member

Unit 2

Team management - Communication, relations, motivation, potential conflicts solving

4. Some essential tips for effective team management

Here are a few tips for how to effectively lead your team:

Work well with everyone

- Identify different personalities on the team
- Learn how to work together
- Seek to understanding team members
- Respect differences

Value Each member's voice

- Respect each team member
- Be willing to consider other's ideas
- Allow each team member to contribute to the team
- Recognize the value of each team member

Be supportive all team members

- Encourage team members
- Assist team members as needed
- Share information with team members
- Supply team members with the tools they need

Unit 2

Team management - Communication, relations, motivation, potential conflicts solving

4. Some essential tips for effective team management

Here are a few tips for how to effectively lead your team:

Recognize the value of each Team member

- Voice appreciation to everyone
- Recognize individual contributions
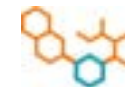- Do random acts of kindness
- Say "please" and "thank you"

Break down barriers

- Encourage open dialogue
- Address communication issues
- Avoid assumptions
- Be careful the perceptions you give

Build relationships

- Build trusting relationships
- Be transparent
- Take time to get to know each other
- Be available
- Inform your stakeholders

	Yes	No
1. I am aware why teamwork is a fundamental issue regarding the successful implementation of the project.	○	○
2. I understand the main differences between the different types of teams.	○	○
3. I am aware of what emotions and behaviors are expected from group members at different stages of group development, and what key tasks the group has at different stages of development	○	○
4. I can distinguish different styles of group management.	○	○
5. I know the most necessary team management skills.	○	○
6. I know some tools with which you can make teamwork more effective	○	○

After reflecting on your answers, you can think about areas where you might want to improve or areas where you are already doing well.
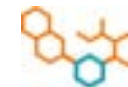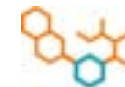
AMAZING

YOU ARE ON THE RIGHT TRACK

TRY AGAIN

If you have answered more 'NOs '' then "YESes '' – it may be worth arranging an extra meeting with the project team to clarify it all!

Unit 2
Pratical assignment:

We suggest you to do the following case study. You can print it.

👆 Find more information to complete the activity here!

Unit 3

Monitoring - from the perspectives of the project manager

Lorenza LUPINI and LUCA BORDONI, Cooperativa Sociale COOSS MARCHE ONLUS scpa

DOUBT

Learning Objectives

After studying this chapter, you shall be able to:

- To understand the importance of monitoring the project ongoing under different aspects.
- To understand how a monitoring system works.
- To know the application of the different tools of the monitoring process.
- To understand the importance of risk management
- To know the procedure of amendment of a grant agreement.

The challenge addressed by this chapter:
How to manage a proposal after the approval, both from the point of view of the monitoring aspects (system of quality, indicators, tools, etc.), the risk management and how to manage the eventual procedure of the amendment of a grant agreement.

Estimated time for studying this chapter and doing the practical activity: **1,5 hour studying**

**2 hour for the practical assignment.**
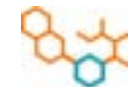
1. How to manage a granted collaborative project: the importance of monitoring aspects

1.1. General Introduction

Once the funding for the submitted project has been approved, it is time to deal with all aspects of its management. While we analysed in Chapter 1 the more technical management aspects and in Chapter 2 those more inherent to the coordination of human resources, we now look at what are the fundamental steps to monitor and control over time all the stages of the work progress.

Specifically, we are going to consider "collaborative project": in fact, most EU-funded projects are implemented by partnership of organisations from different EU countries or associated countries organised in a form of a consortium, managed by a project coordinator. If the grant is awarded, a contract, called 'grant agreement', is signed and the project implementation can start. Guidance is available at each step of the way, in the form of reporting templates and deadlines to keep to throughout the project. Below please find information about the different steps in project management.
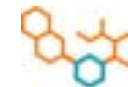
1. How to manage a granted collaborative project: the importance of monitoring aspects
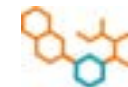
1.2. Signature of a grant agreement

If the project is selected for a grant:

The applicant and the Funding Authority (I.e., in Erasmus+ it may be National Agency or Executive Agency) sign a "grant agreement". The applicant will receive the grant agreement, which must be signed and returned to the Funding Authority; the Funding Authority signs last. Once the grant agreement is signed by both parties, the applicant becomes the beneficiary of an EU grant and can start the project. Grant agreements may take the form of a **mono-beneficiary** agreement, when the applicant is the sole beneficiary, or a **multi-beneficiary** agreement, when all partner organisations in the consortium are beneficiaries of the agreement. The multi-beneficiary agreement is signed by the coordinator, who is the sole point of contact for the funding authority.

However, all other organisations participating in the project (co-beneficiaries) sign a **mandate** giving the coordinator the responsibility to act as lead beneficiary.
Mandates from each partner to the coordinator should normally be provided during the application phase.

1. How to manage a granted collaborative project: the importance of monitoring aspects

1.2. Signature of a grant agreement

As an applicant you may have to follow several steps at this stage:

- Provide further legal and administrative details not included in the proposal;
- Be ready to amend your proposal as indicated in the evaluation report, if applicable.

Generally, in a multi-beneficiary agreement, the signature's procedure follows these main steps:

1. Signature of mandates - during the preparation phase, before submission of the project.
2. The Funding Authority prepares the Grant Agreement for signature.
3. The coordinator's legal representative signs the Grant Agreement.
4. The Funding Authority signs the Grant Agreement. 5. Grant Agreement is finalised.

For the projects co-funded directly by the European Commission (as, for example, the Creative Europe Programme or the Citizens, Equality, Rights and Values Programme) the whole procedure is done electronically. All the project partners are required to approve the grant agreement in the dedicated project management system.
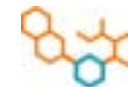
Unit 3

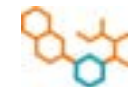*Monitoring - from the perspectives of the project manager*

1. How to manage a granted collaborative project: the importance of monitoring aspects

1.3. Reporting, deliverables and visibility requirements

To make sure your project is carried out according to agreed standards and deadlines, there are a few steps to consider:

- **Reporting** → You must submit regular technical and financial reports to the Commission or contracting authority.

- **Deliverables** → Depending on the project, you may have to submit specific deliverables (such as general information, a special report, a technical diagram brochure, lists, software milestones, etc.), which have been identified in the grant agreement.

- **Communicate about your project results** → Effective communication is also an essential component of successful EU-financed cooperation projects and programmes. You must plan communication activities from the start of your EU-funded actions – there are certain visibility and communication requirements to follow depending on your programme or project.

1. How to manage a granted collaborative project: the importance of monitoring aspects
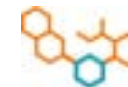
1.4. Monitoring, checks, audits and reviews

The Commission will monitor the implementation of your project (during or afterwards) to ensure its **compliance with the grant agreement**.

The process of checks, audits and reviews depends on your grant and the project and may involve:

- **Checking** it the action has been properly implemented in accordance with the grant agreement, including assessing whether deliverables and reports are consistent with the description and work plan.
- Financial audits on your accounts as the beneficiary, to **verify** the eligibility of the costs incurred.

1. How to manage a granted collaborative project: the importance of monitoring aspects

1.5. Amendments to grant agreements

Your **grant agreement** may sometimes need to be amended. The reasons for making an amendment may vary largely.
All details about the procedure of amendment will be described in next paragraph:
Title 5: Procedures for Changes in the Grant Agreement.

1.6. Keeping records

It is important to **keep records** and other supporting documentation to prove that your project has been properly managed and implemented. This includes keeping records on eligible costs and corresponding accounts.

1.7. Payment of the grant

Grants are usually paid out in several installments over the duration of the project. Once you have signed the grant agreement, you will receive a **pre-financing payment** which may be followed by one or more interim payments. You will receive final payment on completion of the project. Interim and final payments are made subject to project deliverables. It is important to **report** on the progress of your project in accordance with the reporting calendar set out in the grant agreement.
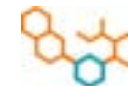
1. How to manage a granted collaborative project: the importance of monitoring aspects

Important: Acceptance of an application does not constitute a commitment to grant funding equal to the amount requested by the applicant. The requested funding may be reduced according to specific funding rules applicable to a given action.

Have a look at chapter 1 of this Toolkit for some examples of situations, when project budget reductions may be applied.

The award of a grant in a given selection round **does not confer any entitlement** in relation to subsequent rounds. It should be noted that the grant amount provided for in the agreement is a ceiling which cannot be increased, even if the beneficiary requests a higher amount.

The funds transferred by the funding authority must be **identifiable in the account or sub-account indicated** by the beneficiary for the payment of the grant.

2. Key aspect of the monitoring process

2.1. Introduction

As a project beneficiary, it is crucial to **ensure the success** of the project through effective monitoring. This chapter provides an overview of the system, time schedule, and person responsible for monitoring the project. We will also be exploring different tools for monitoring, such as interviews, focus groups, progress reports, and team meetings. Lastly, we will touch upon annexes and their importance in the monitoring process.
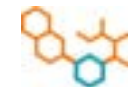
2.2. Monitoring

Monitoring is an essential aspect of project management, as it enables project managers to keep track of progress, identify issues, and make necessary adjustments.
The following are key considerations when it comes to monitoring a multi-beneficiary project:

- **System for Monitoring:**

Monitoring a project is an ongoing process that requires careful attention to details. The monitoring system should be designed to track the project's progress, identify areas where the project is falling behind schedule or not meeting expectations, and identify potential problems before they become major issues. The monitoring system should include a set of **key performance indicators (KPI)** that can be used to track progress and assess the project's success.

2. Key aspect of the monitoring process

What are KPIs?

Performance indicators are **measures of project impacts, outcomes, outputs, and inputs** that are monitored during project implementation to assess progress toward project objectives. They are also used later to evaluate a project's success.

Indicators **organize** information in a way that **clarifies** the relationships between a project's impacts, outcomes, outputs, and inputs and help to **identify** problems along the way that can impede the achievement of project objectives.

Measuring **key performance indicators (KPIs)** involves capturing specific data and converting it into useful metrics that can be measured and reported in easily digestible charts and dashboards.

KPIs are identified for each WP both **transversally** (management, dissemination, evaluation, ...) and **vertically** (activities 1, 2, etc.). Verification methods and minimum thresholds of achievement are also defined.

Example

WP TITLE: Dissemination
LEADER of WP: name of the organisation
KPI -> MEANS OF VERIFICATION → Link to the project web site

KPI 1 – Realization of a project web site → Google analytics
KPI 2 – Number of visits to the project website → Project FB page
KPI 3 – Number of likes on the project FB page → List of Participants
KPI 4 – Minimum 25 Participant attending National Multiplier Event

2. Key aspect of the monitoring process

- **Time Schedule:**

The monitoring schedule should be established at the beginning of the project and reviewed regularly throughout the project's lifecycle. The schedule should include specific milestones and deadlines that must be met, as well as the person responsible for meeting each milestone.

- **Person Responsible for Monitoring:**

The person responsible for monitoring the project will depend on the size and scope of the project. In most cases, this person is the project manager, who is responsible for overseeing the project from start to finish. The project manager should be knowledgeable about the project's goals, objectives, and timelines, and be able to identify areas where the project is falling behind schedule or not meeting expectations.

All these aspects: the System of monitoring, the Time Schedule and the responsible persons are defined, described and agreed in the **Monitoring and Quality Plan.**

The **Quality Plan** contains, in addiction, all tools, deliverables and annexes useful for the monitoring process. It may also include the Evaluation Strategy (See Chapter 4).
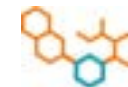
3. Monitoring tools, deliverables and annexes

3.1. Tools for Monitoring

There are several tools available for monitoring an European project.
These include interviews, focus groups, progress reports, team meetings, SWOT analysis, etc.
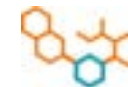
3.1.1 Interviews/Questionnaires/Template to collect information for the monitoring

The purpose of these tools is to **gather feedback** on the project's progress, **identify areas for improvement**, and **address any concerns** that stakeholders may have.

See an example here! You can download it and print it ⬤

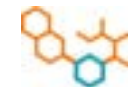## 3. Monitoring tools, deliverables and annexes

3.1.2. Focus Groups

Focus Groups are another **tool for gathering feedback** from the stakeholders. These groups can be organized by project partners and can include a diverse range of participants, such as project beneficiaries, end-users, and experts in the field. The **purpose of a focus groups** is to gather feedback on **specific aspects** of the project, such as the project's impact on the end-users or the quality of the project outputs/results.

See an example here! You can download it and print it ⬛

3. Monitoring tools, deliverables and annexes

3.1.3. Progress Reports

Progress reports should be submitted regularly by each project partner, detailing their progress towards meeting the project's goals and objectives. These reports should be reviewed by the project manager and other project partners to identify areas where improvements can be made.

The template of the progress report will be provided by the Funding Authority.
**Typically, it contains a request of: information related to the implemented activities, assessment of the level of reaching the project goals, some reference to the project management.**

3.1.4. Financial report

This report is the financial part of the progress report and includes information on the project budget, expenditures, and income.

The template will be provided by the Funding Authority: it contains information related to the costs and the budget used to implement activities
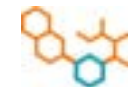
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3. Monitoring tools, deliverables and annexes

3.1.5 Team Meetings

Regular team meetings should be held to discuss project progress, identify any issues that need to be addressed, and ensure that everyone is on the same page. These meetings can be held virtually or in-person, depending on the project's location and the availability of project partners.

It's a good practice to devote a part of the meeting to the state of the art of the project activities and tasks and eventual issues and possible corrective measures in order to have a constant monitoring of the overall ongoing.
Also, a round of feedback and impressions, at the end of the meeting, may be a useful tool to monitor the partnership situation.

3.1.6 SWOT analysis

It is a tool that analyses four areas and two dimensions of a project.
It comprises four components:
Strengths, Weaknesses, Opportunities and Threats – S.W.O.T.
Strengths and Weaknesses represent internal factors, while Opportunities and Threats are external factors.
SWOT analysis supports the actors to define helpful areas to push and harmful ones to prevent and correct.

3. Monitoring tools, deliverables and annexes

**The following chart summarises this diagram in a simple manner:**

3. Monitoring tools, deliverables and annexes

3.1.7. Annexes

Annexes are an **essential part of the monitoring process**. They provide additional information that can be used to assess the project's progress and success.

Annexes can **include** project plans, budgets, progress reports, and other relevant documentation.
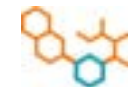
4. Risk Management

4.1. Introduction

As with any project, there is always the possibility of unforeseen circumstances that could have a significant impact on the project's success. This chapter aims to provide **guidance on risk management** for EU (co-)funded projects, with a particular focus on **flexibility and coping** with unforeseen situations such as the Covid pandemic and military conflicts.

4.2. Risk Management

Risk management is a process that involves **identifying, assessing, and managing risks** that could affect the project's objectives. A **risk is an uncertain event or condition** that, if it occurs, could have a positive or negative impact on the project's objectives. To effectively manage risks, it is essential to have a **risk management plan** that includes the following steps:

- **Identify Risks** → The first step in risk management is to identify potential risks that could impact the project. This involves brainstorming with project team members, reviewing previous similar projects, and considering external factors that could impact the project (i.e.SWOT).

4. Risk Management

- **Assess Risks** → The second step is to assess the likelihood and impact of each identified risk. This involves analyzing the probability of the risk occurring and the severity of its potential impact.

- **Plan Response Strategies** → The third step is to develop response strategies for each identified risk. This involves developing contingency plans to mitigate the impact of the risk and identifying triggers that will initiate the contingency plans.

- **Implement Risk Responses** → The fourth step is to implement the response strategies that were developed in step three. This involves monitoring the project for signs of the identified risks and initiating the contingency plans if necessary.

4. Risk Management

4.3.Flexibility and Coping with Unforeseen Situations:

(Co-)Funded EU projects are subject to many external factors that could impact the project's success.
These factors include political, social, and economic factors, as well as natural disasters and pandemics like Covid-19. To effectively manage these risks, project managers must be flexible and adaptable.

One way to achieve flexibility is by developing a contingency plan that outlines how the project will respond to unforeseen circumstances.
The contingency plan should identify the **1- triggers** that will initiate the plan, **2- the probability and potential effect** and, finally, **3 - the actions** that will be taken (and by whom) to mitigate the impact of the risk. The contingency plan should also identify the resources required to implement the plan, such as additional funding or staff.

4. Risk Management

Examples

Process of preparing a contingency plan

BUSINESS OPERATION			
EVENT	TRIGGER	ACTION	PERSON RESPONSIBLE
Scenario A			
Scenario B			
Scenario C			
Scenario D			

|		IMPACT				
		Marginal	Minor	Moderate	Major	Severe
LIKELYHOOD	Almost		Scenario C PP = 8			Scenario D PP = 25
	Likely					
	Possible				Scenario A PP = 12	
	Unlikely		Scenario B PP = 4			
	Rare	Scenario E PP = 1				

4. Risk Management

4.3.Flexibility and Coping with Unforeseen Situations:

Another way to achieve flexibility is by **building a team** that is adaptable and responsive to change.
This involves selecting team members who are willing and able to adapt to changing circumstances and providing training to develop their skills and knowledge.
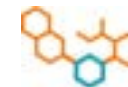
5. Procedures for Changes in the Grant Agreement
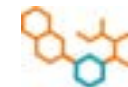
5.1. Introduction

The grant agreement is a legal document that outlines the terms and conditions of the EU funded projects.

The grant agreement defines:

- What **activities** will be undertaken;
- The project **duratio**n;
- Overall **budget**;
- **Rates** and **costs**;
- The EU budget's **contribution**;
- All **rights** and **obligations**;
- And more!

Amendment of the Grand Agreement may reflect the need to **adapt** to the changing conditions for implementation of the action/work programme (e.g., modify the initially envisaged budget, prolong the implementation period of the action, etc.). They could also include **changes** related to the beneficiary itself (e.g., changes in the legal status, address, bank account, legal representative of the beneficiary).

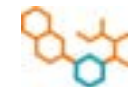## 5. Procedures for Changes in the Grant Agreement

5.1. Introduction

Grant agreements may be **amended only in writing**. Amendments enter into force on the date on which the last party signs, or on the date of approval of the request for amendment.

Amendments then take effect on a date agreed by the parties.

For reasons of legal certainty and equal treatment, the general conditions of the grant agreement or grant decision should remain unmodified. Those conditions are usually published with the call for proposals.

If unforeseen circumstances arise that impact the project's objectives, it may be necessary to make changes to the grant agreement. The following procedures should be followed to make **changes to the grant agreement**.

5. Procedures for Changes in the Grant Agreement

5.2. Step by step guide to proceed for with Grant Agreement's amendments

| **Notify the Granting/ Funding Authority**	**Open the process**	**Submission of the request**	**Wait for Approval**
If a change to the grant agreement is necessary, the project manager must **notify the Funding Authority** as soon as possible. The notification should include a **detailed explanation** of the change, the **reason** for the change, and the **impact** of the change on the project. The Funding Authority will decide if an official amendment is needed and if the updates that you want to introduce are acceptable.	The project manager must submit a **request** for amendment to the Funding Authority. Sometimes the whole amendment process is paperless – everything is done **online,** so you have to "open" the ticket in the portal.	In the next step, the amendment justification must be **prepared together** with all Grant Agreement updates (project plan, project **duration changes**, etc.). Once ready, all the documents are submitted for your Project Officer review.	The Funding Authority will review the request for amendment and **make a decision** on whether to approve the changes. If the changes are approved, a **new grant agreement** will be issued, and the project can proceed with the changes.

Signature of the New Grant Agreement
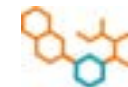
	Yes	No
1. I am aware about the importance of monitoring the project ongoing under different aspects	🟢	🔴
2. I understand how a monitoring system works	🟢	🔴
3. I can define a list of KPIs	🟢	🔴
4. I know how to apply different tools of the monitoring process	🟢	🔴
5. I am aware about the importance of risk management	🟢	🔴
6. I know the procedure of amendment of a grant agreement and the main steps to proceed with it	🟢	🔴

After reflecting on your answers, you can think about areas where you might want to improve or areas where you are already doing well.
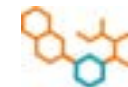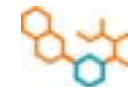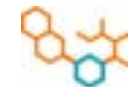
AMAZING

YOU ARE ON THE RIGHT TRACK

TRY AGAIN

If you have answered more 'NOs " then "YESes " – it may be worth arranging an extra meeting with the project team to clarify it all!

We suggest you to do the SWOT analysis activity . You can <u>print it.</u>

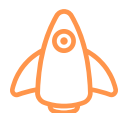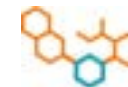# ☝ Find more information to complete the activity here!

Unit 4

Evaluation: process (time-budget-quality), impact

Ingibjörg Benediktsdóttir, Hilmar Valur Gunnarsson
e Arnþrúður Dagsdóttir - Husavik Academic Center /
Þekkingarnet Þingeyinga (HAC)

DOUBT

Learning Objectives

After studying this chapter, you shall be able to:
1. Understand the process of evaluation in project work (time-budget-quality)
2. Understand impact and how it can be evaluated
3. Understand how to sustain the project results, sustainability, exit strategy – what happens after the project ends; how to keep all the new knowledge/tools/… alive;
4. Understand how dissemination and communication of the project activities/results can be measured.

The challenge addressed by this chapter:
How to set project objectives and regularly check that you are working according to them and achieving them.
Promoting project quality control.
Understanding whether your project is making a difference.

Tempo stimato per studiare questo capitolo e svolgere le attività pratiche: **1 ora per studiare e 1 ora per attività pratiche.**

Unit 4

Evaluation: process (time-budget-quality), impact

1. Evaluation of the project

1.1. General Introduction

Throughout the lifetime of the project, it is important to keep in mind what the aims of the project are and check regularly if you are working in line with them and if you will reach them.

Quality control is a way to reach your objectives and should be a part of your project from the first steps. It is an important part of all project work, and the key question is: **Is your project making a difference?**

Unit 4

Evaluation: process (time-budget-quality), impact

1. Evaluation of the project
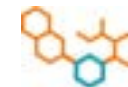
1.2. Evaluation process

Within this question there are other important sub questions such as :

1. Has the project had an impact?
2. Has the dissemination and communication work been successful?
3. Will the project be sustainable after the formal project work is over?

1.2.1 The purpose of evaluation work:

The purpose of evaluation work is to **assess the effectiveness** of programs, policies, organisations, and/or initiatives in order to make decisions about how to improve them. Evaluations can help inform decisions about resources and funding priorities, inform program design, support ongoing program improvement, assess impact, and provide learning opportunities for organisational improvement. It increases the chances of the project being a success!

Unit 4

Evaluation: process (time-budget-quality), impact

1. Evaluation of the project

1.2.2. The 4 W of evaluation

When planning your evaluation process, it can be helpful to ask these **4 questions**:

1. Why? ———————➤ What will the evaluation work bring to your project?

2. What? ———————➤ What will we evaluate, what are our objectives?

3. Who? ———————➤ Who will take part in the evaluation process?

4. When? ———————➤ Evaluation should be considered during the whole project cycle.

Planning stage	**Ongoing evaluation**	**End of activity evaluation**	**Follow-up evaluation**
When planning the aims and objectives of a project the evaluation plan should be developed.	For example a mid-activity evaluation, are our objectives being met?		This takes place after an activity

1. Evaluation of the project

1.3. Types of evaluation - Formative (process) and Summative (impact)

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

+ • **Formative Evaluation**

+ • **Summative Evaluation**

Formative evaluation is used for the improvement of the project. It is conducted during the process, often at the mid-point to provide information to make changes in the implementation of the project. Formative (process) evaluation aims to assess initial and ongoing project activities, with a view to improve the work in progress and increase the likelihood that the project will be successful. It is done at several points during the project implementation, and has several components:

Needs assessment
Evaluability assessment
Implementation evaluation
Progress evaluation

Summative evaluation focuses on the effectiveness of a project, its results, sustainability and impact. It is conducted to provide evidence about the success of a project and is usually conducted towards the end. What was achieved and how? What lessons can we learn for our future work? Summative (impact) evaluation aims to assess the quality and impact of a fully implemented project, and to verify if the project has reached its stated goals. Summative evaluation also has several components:

Outcome evaluation
Impact evaluation
Cost-effectiveness
Cost-benefit analysis

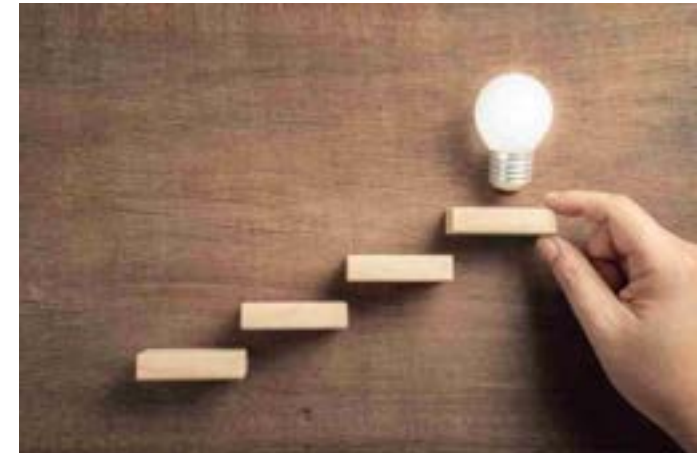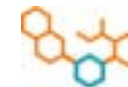## 1. Evaluation of the project

1.4. Steps in the evaluation process

It is essential that the planning of the evaluation of the project is done at the same time as the design of the project.

1	**Identify key evaluation points.**
2	**Formulate evaluation questions, indicators, and targets data.**
3	**Select an evaluation design / model.**
4	**Collect data.**
5	**Analyse.**
6	**Report evaluation findings.**

Unit 4
Evaluation: process (time-budget-quality), impact

1. Evaluation of the project

1.5. Monitoring or Evaluation

Monitoring and evaluation are two management tools to use for quality control during a lifetime of a project, but what is the difference?

An analogy: Monitoring is like when baking a chocolate cake and checking the oven every few minutes to see if it is burning. Evaluation is tasting it when it is ready and knowing if it is any good.

- **Monitoring**

Monitoring is the process of **gathering information** during the project, **tracking** its progress, using e.g. key performance indicators.

Purpose:

The purpose of monitoring is to track progress and performance in real-time;

Timing:

Monitoring is ongoing and happens throughout the project or program lifecycle;

Methods:

Monitoring uses methods such as data collection, analysis, and reporting to provide real-time information for decision-making and improvement;

Scope:

Monitoring focuses on tracking activities, outputs, and outcomes;

Audience:

Monitoring is primarily for internal stakeholders, such as project managers and implementers;

Outputs:

Monitoring produces regular reports and updates that provide ongoing feedback for improvement.

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Unit 4

Evaluation: process (time-budget-quality), impact

1. Evaluation of the project

1.5. Monitoring or Evaluation

• **Evaluation**

Evaluation is the process of assessing the effectiveness of the project or a part of a project by collecting information and analysing it.

Purpose:

Evaluation is to assess the effectiveness, impact, and sustainability of a project or program over time.

Timing:

Evaluation is typically conducted at specific intervals, such as the end of a project.

Methods:

Evaluation uses methods such as surveys, interviews, and case studies to assess the quality, relevance, and sustainability of a project.

Scope:

Evaluation examines the broader impact, effectiveness, and sustainability of a project.

Audience:

Evaluation is for a broader range of stakeholders, including funders, policymakers, and the general public.

Outputs:

Evaluation produces comprehensive reports and recommendations that inform future planning and decision-making.

It is drawing conclusions about the success of the project; Did the project meet its objectives? What was the impact of the project? How can it be improved and what can we learn from it? Is it sustainable? Evaluation usually takes place at specific times in the project work, such as at the end of the project.

1. Evaluation of the project

1.6. Internal and external evaluation

1.6.1. Who conducts the evaluation?

Most evaluations are either external or internal evaluation.

External evaluation: are carried out by individuals who are not a part of the project being evaluated. It is useful to get a perspective that is likely to be objective in their assessment. At times it can also be beneficial to get an expertise that is not available within the consortium.

Internal evaluation: is carried out by the staff of the partners working on the project.
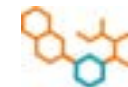
2. What is impact and how can it be measured?

2.1. Introduction. What is the impact?

> Impact refers to the integration of project results in the work of the participating organisations and their transferability to other stakeholders and sectors.

Source: 2023 Handbook on KA2 lump sum

2. What is impact and how can it be measured?

2.2. Impact Assessment

+ *"I didn't realise how powerful evaluating your program was until I did it. Now I can talk about the impact in a way that makes people listen and want to know more. It's not just my view anymore."*

Source: 2023 Handbook on KA2 lump sum

The European public funds are not intended for the finance of outputs, events, or work but to **finance the meeting the real needs of the target audience, solving problems, overcoming challenges and changing people's circumstances.** Therefore, when evaluating if a project is successful the concept of impact is of great importance.

"Before the end of the project, the beneficiary should evaluate the project outcomes and their impact at different levels. At the level of the participating organisations, the impact depends largely on the integration of the project results in the regular work of the organisation and, at a wider level, on the transferability of the results to other stakeholders or sectors. Sustainability of the project and wide and targeted dissemination of results by all project partners is also a key factor of success."

Source: 2023 Handbook on KA2 lump sum
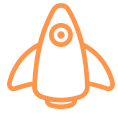
2. What is impact and how can it be measured?

2.2. Impact Assessment

1 Does the project have a positive impact on its participants and participating organisations, as well as their wider communities?
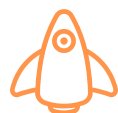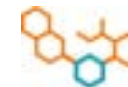
2 Does the project have concrete and logical steps to integrate the project results in the regular work of participating organisations?

3 Do the project results have the potential to be used outside the organisations participating in the project during and after the project lifetime?

Unit 4

Evaluation: process (time-budget-quality), impact

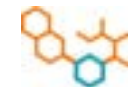## 2. What is impact and how can it be measured?

2.3. Impact+ Exercise

Impact assessment and evaluation takes time and effort to be effective.
Impact+ Exercise is a tool developed as part of a Transnational Cooperation Activity project led by the United Kingdom Erasmus+ National Agency and CMEPIUS the Slovenian Erasmus+ Education and Training National Agency.
It was developed to assist partners in project work to think about what their impact could be and how to measure it.

The Impact+ Exercise is intended to be used early on during project planning by a group of project partners. However, the Impact+ Exercise is flexible and can be used in different ways, during and after the project has ended.

The exercise includes a workshop to do with your partners within a project. On the **website of the Erasmus+ UK National Agency** the material is available in English as well as in several other different languages. The time needed will depend on the size and complexity of the project but from 3- 7 hours is recommended.

Unit 4

Evaluation: process (time-budget-quality), impact

2. What is impact and how can it be measured?

2.3. Impact+ Exercise

After you have done the Impact+ Exercise the partners need to review and refine their impact plans and to design and implement their data collection methods. After the workshop the results must be used to make an impact assessment plan.

The Impact+ Exercise is split into **four** stages:

Stage 1

Exploring project aims, identifying outcomes and impacts
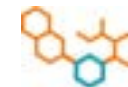
Stage 2

Exploring indicators for your outcomes and impacts

Stage 3

Exploring data sources and data collection

Stage 4

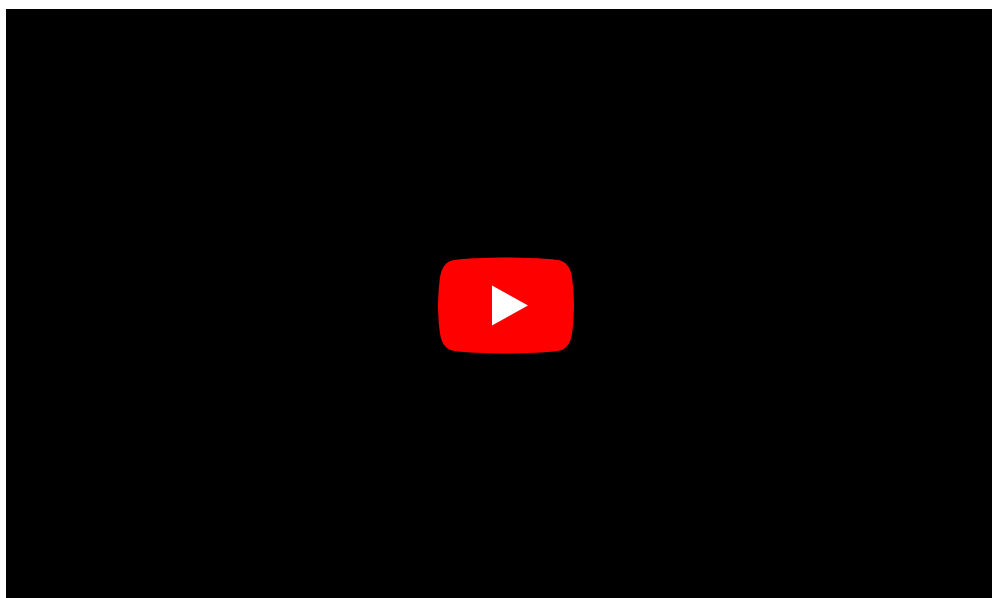Bringing it all together

Unit 4

Evaluation: process (time-budget-quality), impact

2. What is impact and how can it be measured?

2.3. Impact+ Exercise

The scale runs from 1 (low) to 5 (high) and allows participants to rank their expected project impact against each area of potential impact.

Central box	'What are you trying to achieve?'
Four side boxes	These four side boxes represent four different areas of potential impact for projects
Partner organisations	
Learners	Individual students or staff depending on the project focus
Systemic	The sector, subject area of the project, peer or beneficiary networks, policy or legislative change
Project staff	Those managing and coordinating the project

3. Evaluation and sustainability

### 3.1. Introduction. To sustain the project results

> " There will come a time when you believe everything is finished.
> That will be the beginning.

Author: Louis L'Amour

> " A project is sustainable when it continues to deliver benefits to the project beneficiaries and/or other constituencies for an extended period after the Commission's financial assistance has been terminated.

Source: http://eacea.ec.europa.eu/tempus/doc/sustainhandbook.pdf
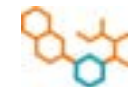
Unit 4

Evaluation: process (time-budget-quality), impact

3. Evaluation and sustainability

3.1. Introduction.

Sustainability and continuation are **crucial to the success of a project**. In this context projects sustainability refers to the continued use of its results after the project has been completed. In the broadest sense, sustainability refers to the ability to maintain or support a process continuously over time.

From the beginning of the project work it is a part of the project design to find ways to ensure the projects sustainability for example with a sustainability strategy, finding ways for securing the further use of both tangible and intangible project results including the mobilisation of other funding sources.

> …In the section on impact and sharing of results, beneficiaries shall show how the results of the projects were made available and produced benefits for the organisations participating in the project and for other stakeholders. The beneficiaries should also provide information on the sustainability and the longer-term impact of the project.
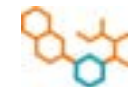
Source: 2023 Handbook on KA2 lump sum

3. Evaluation and sustainability

3.1.1. How to guarantee the sustainability of the project?

- **Identify and involve** stakeholders from early on;

- **Start early;**

- **Plan;**

- **Motivate** end-users;

- **Take care** about the quality and relevance of outputs and high degree of usability, satisfying the demands of providers, policy- makers and stakeholders;

- **Make** the project results reach the right target audiences in a format and at a time that fits them best;

- **Ensure** adaptable outputs to different circumstances, countries, organisations;

- **Define** and **make clear** the advantages for end-users.

3. Evaluation and sustainability

3.2. Exit strategy – what happens after the project ends (How to keep all the new knowledge/tools/… alive)

3.2.1. What is a Project Exit Strategy?

A project exit strategy is a plan intended to ensure that a given project concludes in an orderly manner, with the objectives achieved, any remaining liabilities identified and addressed, and the transition of the organisation to the "next normal" phase of operations. The exit strategy should address any financial, legal, technical, or operational gaps that may still exist and offer solutions to fill them. It should also outline the process for transitioning responsibility from the project management team to the organisation's existing operating teams.

3.2.2. Key features of exit strategy

An Exit strategy is a process, not an event, and it is a part of all the projects. Key features of exit strategy include:

- *Intervention/actions/activities;*
- *Actors (who will implement/manage what)?*
- *Time lines (when will what be done);*
- *Resources needed (financial, human, material);*
- *Source of resources (who will provide human and financial resources);*
- *Monitoring and Evaluation (what and when)?*
- *Who will monitor the activities?*
- *Other challenges and how they can be addressed?*

3. Evaluation and sustainability

3.3. Evaluation of sustainability of the project results

It can be a difficult task to evaluate the sustainability of the project results.

Firstly as it is only after time has passed that it is possible to really evaluate the sustainability of the project results. **Secondly** as in most cases in most projects there is no budget for doing this evaluation and for most not having financial resources to do the evaluation can be a great obstacle.

However it is possible to estimate the work done to sustain the project results and speculate according to this how sustainable the project results are.
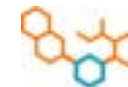
4. Dissemination and communication
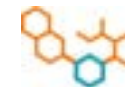
4.1. Introduction

Dissemination is the activity to communicate the project results, to shed light on the activities of the project and its impact. Dissemination is a process throughout the project and makes the project results available to stakeholders and others. It should be planned from the first stages of the project and worked strategically as other horizontal activities of the project.

4.2. Planning for dissemination

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

- **Why** – the purpose of dissemination;

- **What** will be disseminated – the messages;

- **Whom** – the audience;

- **How** – the method;

- **When** – the timing.

Unit 4

Evaluation: process (time-budget-quality), impact

4. Dissemination and communication

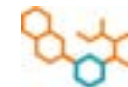### 4.3. Evaluation of the Dissemination

4.3.1. How can dissemination activities be evaluated?

Like all other elements of a project, dissemination activities may be met with varying degrees of success. To determine if a dissemination strategy was well chosen and executed, build an evaluation component into dissemination activities to see if they have achieved their aims. For example, measure the success of a web site by checking the usage logs; evaluate training sessions by asking participants to complete an evaluation questionnaire; and evaluate publications by the number of citations.

Evaluation of evidence use: Define outcome measures to assess if research evidence is used and how it is used by decision makers and potential users.

- **Develop** an evaluation plan for the dissemination strategy.
- **Identify** dissemination goals and indicators.
- **Obtain feedback** from end users.
- **Involve** dissemination partners in evaluating dissemination activities.

☑ Excellent
☐ Very Good
☐ Satisfactory
☐ Poor

Unit 4

Evaluation: process (time-budget-quality), impact

4. Dissemination and communication

4.3. Evaluation of the Dissemination

4.3.1. How can dissemination activities be evaluated?

Like all other elements of a project, dissemination activities may be met with varying degrees of success. To determine if a dissemination strategy was well chosen and executed, build an evaluation component into dissemination activities to see if they have achieved their aims. For example, measure the success of a web site by checking the usage logs; evaluate training sessions by asking participants to complete an evaluation questionnaire; and evaluate publications by the number of citations.

Evaluation of evidence use: Define outcome measures to assess if research evidence is used and how it is used by decision makers and potential users.

- **Develop** an evaluation plan for the dissemination strategy.
- **Identify** dissemination goals and indicators.
- **Obtain feedback** from end users.
- **Involve** dissemination partners in evaluating dissemination activities.

Go back to page 46
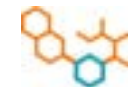
5. Evaluation - The final chapter

> It was a real brain strain at first. When I have my evaluation hat on, I am looking for strengths and weaknesses in the project, thinking ahead and encouraging my co-workers to do things differently if we need to. I encourage people to have a go – and to be realistic. I have to be flexible, but also keep my eye on the goal posts. I have to be careful about what I think I am measuring, and what I am actually measuring – you've got to take your time and think things through.

The project evaluation process entails answering questions such as:

- Did the project achieve its aim and outcomes?
- Did the project achieve any unexpected outcomes?
- What benefits were achieved by the project?
- What was the impact of the project?
- How effective was the project management?
- Was the project delivered on time and within budget?
- Did the project produce work to the required quality?
- What lessons were learnt as a result of the project?
- What will we do differently next time we run a project?
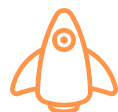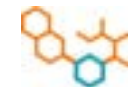
5. Evaluation - The final chapter

5.1. Reporting the Findings of your Evaluation

Here are some recommendations on reporting your findings: Evaluation potentially produces four kinds of knowledge. All could be included in the evaluation report:

- **Findings:** evidence about the program's process, performance, output or outcomes.

- **Conclusions:** bringing numerical and verbal information together to identify what has been learned.

- **Value judgements:** state whether the conclusions indicate 'good' or 'bad', and their extent (e.g. effective, ineffective; efficient, inefficient; appropriate, inappropriate).

- **Recommendations:** advice about what program management, council, or other stakeholders could do next, given what has been learned from the evaluation.

5. Evaluation - The final chapter

5.1. Reporting the Findings of your Evaluation

All evaluation reports should include the following:

- A **summary**, and a **list of findings**, judgements and/ or recommendations;

- A brief description of the evaluation objectives, method, participants and limitations;

- A brief description of the project background, description, management, participants, objectives and method;

- A section on evaluation findings. Evaluation results and their sources should be displayed;

- A section on the conclusions drawn from the evaluation; and

- A **summary section**, [this may be an executive summary] describing what was learnt from the evaluation, and who should know about this information.
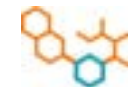
|	Yes	No
1. I am aware of the process of evaluation in the project (time-budget-quality).	◉	◉
2. I understand the difference between formative and summative evaluation.	◉	◉
3. I understand the meaning of impact and how it is evaluated.	◉	◉
4. I am aware of how dissemination activities can be evaluated.	◉	◉
5. I can explain how the dissemination and communication of the project activities/results can be measured.	◉	◉

After reflecting on your answers, you can think about areas where you might want to improve or areas where you are already doing well.

AMAZING

YOU ARE ON THE RIGHT TRACK

KEEP TRYING
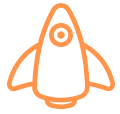
RITENTA!

If you have answered more 'NOs " then "YESes " – it may be worth arranging an extra meeting with the project team to clarify it all!

Understanding and developing an Outcome Hierarchy:

One method of determining a program's or project's 'logic' is to develop an outcome hierarchy. This is the model of evaluation planning that is proposed by this document. An outcome hierarchy sets out the thinking that describes what a program is intended to do. In generic terms, the hierarchy is best described through **Table 1** , and the accompanying text. The outcome hierarchy can be used at any stage of a program's lifespan.

Find more information to complete the activity here!

Unit 5

Project management support tools

Jessica Magalhães, Rightchallenge – Associação

Unidade 5
Project management supporting tools

1. Project management software

1.1. Introduction

Project management software is a type of **application** that helps you **manage projects**. It allows you to create tasks, assign them to the team members and track their progress. The best project management software will allow you to **keep your team on track** while also keeping them motivated because they'll be able to see what they have left to do in order to complete the project successfully. There are many factors that should be considered when selecting the right project management software for European projects. Right now, in 2023, **these are the most popular used tools**:

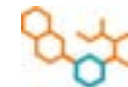| SLACK	Microsoft Teams	Zoom	Google Meet	Skype	Trello	ASANA
+	+	+	+	+	+	+

Unidade 5
Project management supporting tools

1. Project management software

1.2. The Benefits of Project Management Software

Project management software offers numerous benefits, with enhanced efficiency being the most crucial. It ensures **timely project completion**, **cost savings**, and **reduced complications**. Additionally, project managers can improve team communication and collaboration, as all project-related information is **centralized**. This facilitates seamless access for remote and multi-location teams, eliminating the need for individual login credentials within the shared database.

1.3. Popular Project Management Software

Communication is the cornerstone of any successful company. Whether you are a small team or a large company, the tools you use to communicate can make a big difference. With so many communication software options available, it can be difficult to choose the right one for your team. In this article, we'll look at some of the top communication software tools available today. As well as being useful tools, they are also free (microsoft teams, zoom, google meet, skype, trello), or have at least one free version (slack and Asana) . However, if you want more and better features they all give the option of premium subscription and enjoy the best version.

Unidade 5
Project management supporting tools

1. Project management software

1.4. Project Management Software for European Projects

As a **project manager**, you need to be aware of the **regulations and standards** that apply to your project.

Project management software has become an essential tool for managing projects across Europe.

You also need to consider:

Cultural consideratios

Language support

Data privacy requirements

1. Project management software

1.5. The Cost of Project Management Software

- **Free and open-source options:** These are free to use, but they're not necessarily the best option for large projects.
- **Monthly subscription plans:** This is the most common way of paying for project management software. You pay a monthly fee for each user and get access to all features that come with your plan level.
- **Custom enterprise solutions:** Some companies offer custom solutions, depending on what exactly you want done by them and how much customization is required.

1.6. Choosing the Right Project Management Software

Choosing the right project management software is no easy task. It can be overwhelming to sift through all the features and capabilities that each platform offers, especially when you're not sure what you need in a PM tool.

To help you narrow down your options, we've outlined some things to consider when choosing a PM tool:

- **Identifying** the features and capabilities needed (e.g., integration with other systems)
- **Assessing** user experience (e.g., ease of use)
- **Understanding** pricing and payment options (e.g., monthly, or yearly subscriptions)
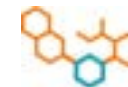
1. Project management software

1.7. Tips for Using Project Management Software

- **Set clear goals** and **expectations**.

- **Create** detailed **plans** and **timelines**.

- **Assign tasks** and **responsibilities** to team members, including yourself if you're the project manager.

- **Track progress** and **deadlines**, as well as any changes in scope or schedule that may occur during the course of your project management software implementation process - this will help keep everyone on the same page about what needs to get done when it needs to get done by (and how much longer it will take).

- **Automate processes** such as email notifications when tasks are due, automated reminders for meetings or calls with partners/stakeholders etc., automatic generation of reports based on data entered into fields within your system (e.g., weekly status updates).

1. Project management software

1.8. Conclusions

Project management software is essential for successful project management in Europe. The right software will enable teams to collaborate and succeed, but it's important to choose the right one for your needs.

Effective communication is essential for any successful business. With so many communication software options available, it's important to choose the right tool for your team. Whether you're looking for a team messaging app, video conferencing tool, or project management software with communication features, there's a tool out there for you.

Consider the needs of your team and try out a few different options to find the best fit.

If you're looking for a comprehensive solution that can help you manage your European projects from start to finish, our top pick would be ProjectManager.com. It offers all of the features necessary for effective project management across multiple time zones and languages, including Gantt charts, task lists and calendars - and it integrates seamlessly with other tools such as Slack or Trello so that team members don't have to switch between different applications when working together on a single project (or even multiple ones).
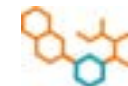
Glossary

01 Kick-off meeting

The first meeting of all the project partners, after the project was chosen for co-financing and (co-)funded (i.e. Grant Agreement signed). At the kick-off, there should be a space for each of the partners to present its organisation and the project team. During this meeting the project implementation strategy is also discussed.

02 Partnership Agreement (PA)

An internal agreement between the project partners, describing the internal rules and conditions for cooperation at delivering a specific project. It shall include, among others: the tasks and responsibilities of the project leader and the project partners, information about the budget distribution and rules for financial management. The PA shall be undersigned by the legal representatives of all the partner organisations at the very beginning of the project realisation.

03 Project officer (PO)

A person, delegated by the granting body, who would be a contact person for the project. The role of the project officer (PO) is to monitor and support the project realisation. You may ask him/her questions if you have any doubts concerning executing the Grant Agreement. You shall also notify him/her of any changes in the project; you may invite to the project events. It is worth it to build a good relationship here – you may get lots of practical and useful advice from the PO.
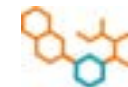
Glossary

04 Co-financing / co-funded

The principle under which part of the costs of a project supported by the EU Funding Authority must be born by the beneficiary or covered through external contributions other than the EU grant.

05 Coordinator/Coordinating organisation

A participating organisation applying for a project's grant on behalf of a consortium of partner organisations. The coordinator has special obligations foreseen in the grant agreement.

06 Partner / Partner organisation

A partner organisation is an organisation formally involved in the project (co-beneficiary) but not taking the role of a coordinator.

07 Grant Agreement

It defines what activities will be undertaken, the project duration, overall budget, rates and costs, the EU budget's contribution, all rights and obligations and more.

08 Contingency Plan

It's a tool to achieve Flexibility and Coping with Unforeseen Situations. It's a strategy that is made for dealing with an emergency, or with something that might possibly happen and cause problems in the future.
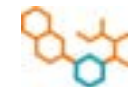
Glossary

09 Evaluation

Evaluation is the process of assessing the effectiveness of a program or a project. This process involves the collection, analysis, and interpretation of data.

10 Impact

The long-term or indirect effects of the outcomes. For example, some participants will actually start running their own business, reducing youth unemployment in a direct (they get a job) and indirect way (they create job opportunities for others).

11 Sustainability of the project results

Sustainability in the project is an approach that balances the environmental, social, economic aspects of project-based working to meet the current needs of stakeholders without compromising or overburdening future generations.

11 Dissemination

Dissemination is the act or process of disseminating or spreading information.
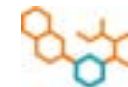
Additional resources and learning materials

UNIT 1:

- Agenda Minutes

- Salary refunding template

- Timesheet template

UNIT 2:

- Internal Monitoring template

UNIT 3 :

- Focus group template
- SWOT Analyses template

UNIT 4:

- Evaluation template

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MINI-INTERVIEWS AND REFLECTIONS FOR THE TOOLKIT

The aim of these short reflections is to show the variety of European projects and the variety of topics.

Poland

Italy

Portugal

Hungary

Iceland

Extra