Erasmus+ Capacity Building projects in the field of Higher Education
Call 2015

PROJECT MANAGEMENT

Project Representatives' Meeting

Brussels, 27-28 January 2016

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INTRODUCING

Management of the CBHE action

European Commission (DG EAC)	Education, Audiovisual and Culture Executive Agency (EACEA)	National Erasmus+ Offices National Agencies EU Delegations
• Policy making, priority setting, programme evaluation • Supervision of the Agency	• Management of the project cycle (content & finance) • Support to project coordinators	• Support at national level

The CBHE Team at EACEA

Head of Unit

Ralf Rahders

Selection team

2 monitoring teams

Finance team
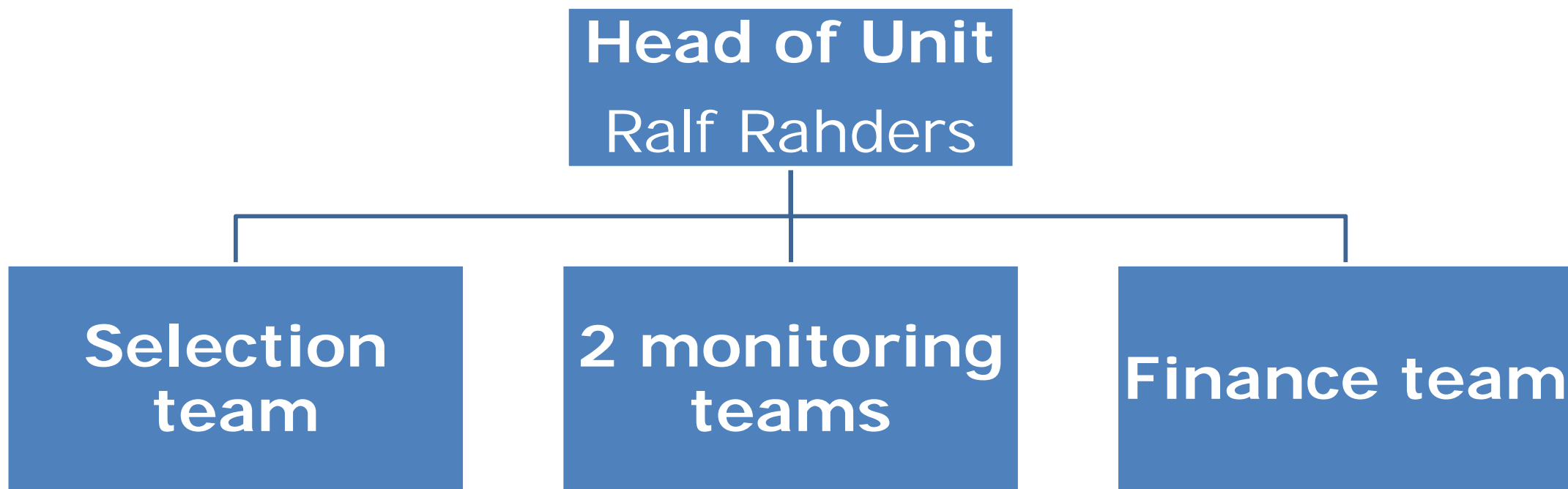
Presentation Content

1. Managing your project

2. Your team

3. Managing your team

4. Quality Assurance

5. Dissemination and Sustainability

6. Working with EACEA and other E+ partners

7. Conclusions

*NB: this document has no legal value*

1. MANAGING YOUR PROJECT

Your CBHE Project

Your proposal — 10%

Your project environment — 90%

Different
- Individuals (/personalities)
- Countries (/cultures, currencies, languages, time zones)
- Legal **requirements**
- Institutional **constraints**

CBHE contractual framework

- Grant Agreement signed by the coordinating HEI **on behalf of the partnership**

- Your CBHE proposal is part of the Grant Agreement.

Shared obligation of the partnership!

Support documents and guidelines for projects implementation available in the CBHE "Beneficiaries' Space"

Project Management Tools

Numerous project management tools available on internet!

2. YOUR TEAM

Working as a team

- A **project team** is composed of **individuals** who act on behalf and with the full support of their **institutions**

- **Trust and confidence** between individuals is **necessary but not sufficient**

- **Tasks and responsibilities** have to be formalised and endorsed in the **Partnership Agreement**

The Coordinator

- Person who is **really in charge** of the project

- A **good coordinator**
  - Has good **management and communication skills**
  - **Is trusted** by the partners
  - Has the **full support of his/her institution**

- **Coordination can/should be shared:**
  - Financial & administrative tasks / academic management
  - Clear distribution of tasks with partners

Role of the Coordinator

- **Oversees the implementation** of activities

- **Manages the funds** of the project

- Ensures the **respect of CBHE rules**

- **Cooperates closely with the key institutional services** in his/her organisation

- **Central communication point** with project partners and external stakeholders

- Is in **regular contact** with the EACEA (through the project officer)

- Submits **interim and final reports and requests for payment** to EACEA

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The Partners

- Must be **fully informed about the project** and aware of the **implementation constraints.** They should:

  - know the **proposal** and the expected results

  - know their **role and responsibilities**

  - know the **contractual framework & the financial rules**

  - respect the **Partnership agreement**

  - work in **full transparency** with the coordinator (inform of any changes / delays)

  - have the full **support** of their organisation.

  - be aware of any **institutional and/or legal constraints** that can affect the project implementation!

Role of the Partners

- **Implement activities** under their responsibility

- **Support the coordinator** (e.g. providing information and supporting documents for reporting)

- **Cooperate with the key institutional services** in their organisation

- **Contribute to the dissemination** of the project results in their organisation, community and/or region

The Partner Country Partners

CBHE projects are meant to benefit Partner Countries

Partner Country partners are responsible for:

- Enhancing Project results **relevance / added value**
- **Awareness raising & Dissemination**
- Identifying and involving **target groups and local stakeholders**
- Respecting national requirements / **legal constraints**

If applicable, it can be useful to nominate a **national/regional coordinator**

Associated partners

- **Not a party** in the Agreement
    → No (direct) funding

- They contribute (indirectly) to the project implementation, visibility and sustainability

Institutional Commitment

Project management is not a "*one man/woman show*" but an **institutional responsibility**

It is **essential to**:

- have the required institutional services/departments **on board from the start**

- provide regular **feedback** to your authorities

Involving your institution's services

International Relations Office

Finance department

Quality assurance services

Student services

Academic services

IT/Communication

Student Involvement

- **In project activities**
    - Curriculum development (presence in advisory board, peer review)
    - Introducing new teaching & learning methods
    - Dissemination & sustainability
      strategy
    - Quality assurance

- **In project bodies & decision-making**

3. MANAGING YOUR TEAM

Example: Team structuring and responsibilities

Management board

Examples of tasks:

Planning & follow-up of project activities

Organisation of mobilities

Purchasing of equipment (tendering procedure)

Etc.

Advisory board

Examples of tasks:

Quality control of activities

Consultations on conflict issues

Monitoring of the project implementation

Etc.

Distribution of tasks and deadlines

Decision-making process

Workplan & budget

Partnership Agreement (1)

- **Two objectives:**
  - Transparency and formalisation of **project management procedures**
  - **Commitment** to the project

- **Guidelines available** on Agency website

- **Negotiated with partners**

- **Signed at the highest level** (not by the coordinators !)

- **Joint** (recommended) **or Bilateral**

- **National and institutional constraints and legislation** must be taken into account

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Partnership Agreement (2)

Project management and decision-making process	Quality Assurance	Communication
Conflict resolution	Partners' roles and responsibilities	Financial aspects

Etc.

Communication

- Define communication **means, channels & frequency**
- **Multilateral** communication
- **Transparency and trust**
- Consider **intercultural differences**
- **Problem-solving**
- **Meetings**
    - Minutes
    - Respect the deadlines and dates agreed at the meeting

Conflict Resolution

- **Disagreements** should not lead to **conflicts**

- **But - need contingency measures**

- **Reduce the risk** of disputes with:
  - Trust, honesty and respect
  - Partnership agreement
  - Proactive attitude
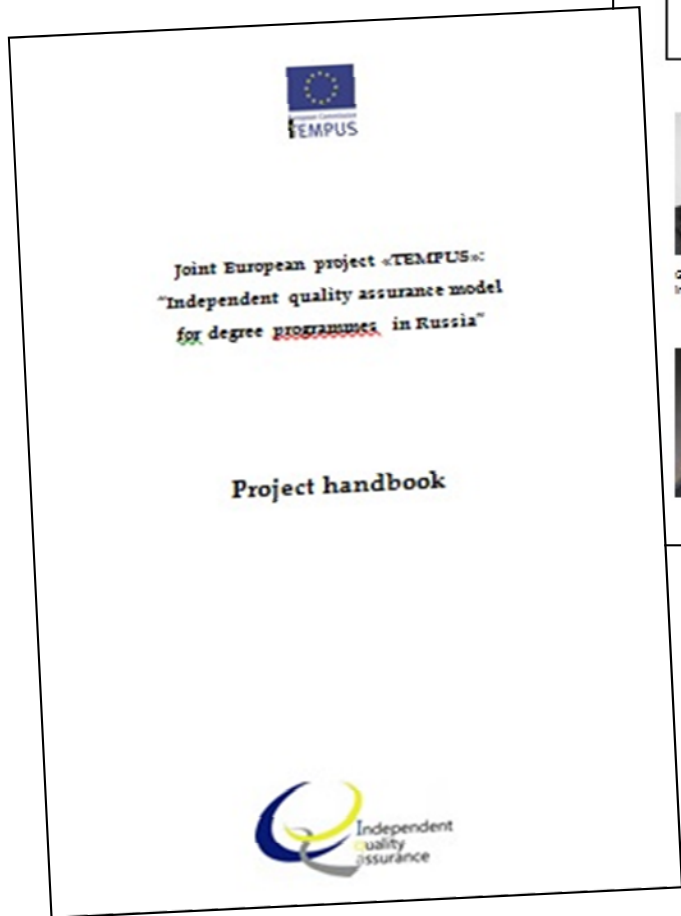 - Inter-personal skills
  - Equal treatment

In principle, **EACEA does not intervene** in the internal affairs of the partnership !

Best practice: Who is who in the project?

Description of work experience and contact details of each project staff

Best practice: Team preparation

Initial trainings and exposure for the teams:

- General administrative and project-running matters
- Eligible expenses
- Tendering procedures
- Supporting documents
- Online communication tools
- Quality control, reviews and progress reports
- Importance of labour market feedback
- Cross-cultural awareness
- Web design tips
- Importance of dissemination to ensure sustainability
- Etc.

Project Management Manual

QA handbook

Brief on national tax and regulatory issues

Prerequisite to effective performance

4. QUALITY ASSURANCE

Internal Quality Assurance (1)

- **For the project _by the project_**
  Not "_limited to_" internal QA of the participating HEIs

- **Concerns all dimensions** of the project
  Academic aspects, financial & administrative, management, outputs, visibility/dissemination, impact, relations with EU, etc.

- **Involves all parties** concerned by the project
  Academic, admin. staff, students, local stakeholders, etc.

- **Tools**: roadmaps, dashboards, questionnaires, reports etc.

➡ **Keep partners informed of the evaluation results** and the remedial actions taken

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Internal quality assurance (2)

Nominate team or person responsible for the monitoring of activities and outputs:

- Regular assessment of LFM, Work plan and Budget
- **Progress reporting** (Indicators of progress) – at project level or by work package / activity
- **Financial reviews**
- Analysis of **EACEA Evaluation and Monitoring reports**

➡ **Recommendations / Corrective actions**

External Quality Assurance

- Persons/bodies **not involved in the project**
  - Peer-review by experts not involved in the consortium
  - Representatives from local authorities / private companies
  - National QA Agencies

- Same **holistic approach** as for internal QA (in terms of dimensions addressed and parties consulted).

- Regular **monitoring + recommendations**

Best practice: Risk Management (1)

Examples of Challenges	Possible contingency plans used in various projects
Commitment and motivation of partners	- Expectations should constantly be communicated to partners. - Delegate responsibilities to partners to increase their involvement in the project
Cultural differences, i.e. different ways to communicate and to deal with issues	- Organise regular face-to-face meetings to know each other - Cultural awareness to anticipate potential conflicts
Incomplete supporting documents	- Project Handbook - Training on CBHE rules
Availability of staff (different academic years, conflict with other duties)	- Have dedicated teams - Plan well in advance

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Best practice: Risk Management (2)

Examples of challenges	Possible contingency plans used in various projects
Delays due to lengthy procedures: tendering, project registration, international accreditation, etc.	▪ Prepare everything in advance, so that the activity can start as soon as the green light is given.
Visa issues	▪ Plan meetings well in advance to allow time for the visa procedures
Political instability	▪ Meetings relocated to safer location ▪ Contact EACEA in case of problems
Exchange rate issues	▪ Keep project account in Euros ▪ Invoices paid by European coordinator/partners
Difficulty to make bank transfers	▪ Use other means (Western Union type transfers, credit cards for partners) ▪ Cash payments not recommended

5. DISSEMINATION AND SUSTAINABILITY

Dissemination – general advice

- **Requirements of the Grant agreement**
  - **Visibility** of project results
  - Availability of **materials produced**
  - Use correct **logo and disclaimer!**

- Important to **define stakeholders** and plan dissemination according to target groups
  - Internal and external target groups (incl. public authorities)
  - Dissemination at regional level

- Start dissemination **from the beginning of project**

- Check Annex II of the Erasmus+ Programme Guide: **Practical Guide on Dissemination and Exploitation**

Dissemination tools (1)

Project website (obligatory)

- Should be visually attractive and easy to use
- Answer questions Who – What – When- Where – Why?
- Update regularly
- Publish all project materials
- Links from partner websites

Social media

- More and more used by projects
- Do not replace the website
- Require more frequent updating

Dissemination tools (2)

Project publications and promotion material

- Should **target (mainly) a Partner Country audience**
- Amounts produced should be justified by the **size of target the audience**
- Should be produced in a **cost-effective way** (not everything needs to be printed!)

Dissemination events

- Workshops, seminars, roundtables, (mainly) **in Partner Countries**
- At **institutional / country / regional** level
- Include **external stakeholders** (enterprises, national authorities, NGOs, etc)

Dissemination & Sustainability

- Project results should be sustainable and should **continue to be used /updated** after the end of the project funding

- **Dissemination supports sustainability** by ensuring
  - **visibility of the project** at partner institutions
  - interest from **students** (e.g. for new study programmes)
  - support from the **university authorities and services**
  - support from **policy makers, labour market and others relevant stakeholders**
  - awareness among **general public**

Ensuring Sustainability

- Sustainability of **financial / administrative / legislative** achievements

- Continuation of **developed study programmes**

- Continued **cooperation with project partners**
  - **Student and staff mobility**
  - **Joint degrees**
  - **Research cooperation**
  - **New projects**

- Continued **cooperation with stakeholders at national/ regional levels**

6. WORKING WITH

AND OTHER ERASMUS+ PARTNERS

Working with EACEA

- **Grant holders' meeting** at the beginning of the project

- Designated **Project Officer** in charge of your project
  - Holds **direct contacts** with the project (via the coordinator exclusively!)
  - Is responsible for **contractual monitoring** (accepting modifications / allowing exceptions)
  - **Assesses the reports** and monitors progress made
  - Implements **monitoring visits** during the project lifetime

- **Formal (/contractual) correspondence** is to be addressed to the Head of Unit in EACEA.

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Field monitoring (1)

Visits carried out by EACEA and/or National Erasmus+ Offices *(in ex-Tempus countries)*

Aim of Monitoring visits

- Check that the project is on track
- Check that partners are fully involved in the project
- Offer support and advice
- Provide written feedback and recommendations to project coordinator

Field monitoring (2)

Format:

- **On the spot or "virtually"** (video-conference)

- At one of the **partner institutions** (with local partners) / During **coordination meetings** (with all partners) / At **EACEA**

Each project will be visited at least once during its lifetime!

Reporting to EACEA

Progress report (halfway through the project lifetime)
Final report (two months after the end of the eligibility period)

- **Do not underestimate the amount of time** necessary to write a report

- **Do not copy and paste information** from other reports (/the application)

- **Answer the questions asked** on the reporting template – no more no less

- **Be honest** in your report and present problems (and the remedial actions envisaged) as well as successes

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Other Erasmus+ contacts at national level

- **National Erasmus+ Offices** in 27 Partner Countries
  - Provide advice and support in project implementation
  - Organise information days, seminars, workshops
  - Carry out monitoring visits

- **National Agencies** in all Programme Countries
  - Provide advice and support in project implementation
  - Organise information days, seminars, workshops

- **EU Delegations** in Partner Countries
  - Follow higher education developments and Erasmus+ implementation in Partner Countries
  - Participate in Erasmus+ related events

Exchange with other projects

- Look for **projects in the same country / institution**
  - Working with the same partners / countries, on the same topic, under the same action etc.

- Organise **meetings to share**:
  - Outputs
  - Experience
  - Good practice

7. CONCLUSIONS

Getting started

- Organise your **kick-off meeting**

- **Review project plan** and revise if necessary

- Take into account **internal/external changes and constraints** that could affect project implementation

- **Allocate roles** according to work packages

- Create **project management structure** (management board, advisory board)

- Set up **communication rules**

- **Revise budget allocation** if necessary

- Produce **Partnership Agreement**

Do not underestimate the administrative and financial workload of a CBHE project !

RECOMMENDED

In case of doubt

Do not hesitate to refer to:

- EACEA website: http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space/capacity-building-in-higher-education_en
- Grant Agreement
- Guidelines for the Use of the Grant
- Guidelines for Partnership Agreement
- National Erasmus+ Offices (NEO)
- National Agencies
- Your EACEA Project Officer