EACEA: MEETING OF NEW PROJECTS
Leonardo Da Vinci, Grundtvig, Key Activity 4, EQF and ECET
Brussels, 21-22 January 2010

Workshop: Project management
Holger Bienzle
Workshop topics

Characteristics of a Multilateral Project
Benefits and challenges

Even more project planning?
Planning tasks and tools after the project has been selected

Internal contractual and financial management
Dealing with partner agreements, payments and internal reports

Management of the human dimension of the project
Team building and shared ownership in a project
Characteristics of a Multilateral Project

Education and Culture DG

Lifelong Learning Programme
"A project is a temporary endeavour undertaken to create a unique product or service."

It is

"performed by people

constrained by limited resources

planned, executed, and controlled."

What is project management?

„Project management is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.“

(PMBOK Guide (2008), 10)
Multilateral Projects in the LLP

**Sectoral programmes**

- **Comenius**
  - School education
- **Erasmus**
  - Higher education
- **Leonardo da Vinci**
  - Vocational education and training
- **Grundtvig**
  - Adult education

**Transversal programmes**

- **Key activity 1:** Policy cooperation and innovation
- **Key activity 2:** Information and Communication Technologies
- **Key activity 3:** Languages
- **Key activity 4:** Dissemination and exploitation of results
Benefits of participation

- Personal
- Political
- Professional
- Institutional

Project management is about creating such benefits for all partners...
Benefits of participation

Multilateral Projects build bridges and create access…
## Benefits of participation

<table>
<thead>
<tr>
<th>Statement</th>
<th>Commonas Base size: 1239 respondents</th>
<th>Eurexmas Base size: 715 respondents</th>
<th>Grundthrig Base size: 527 respondents</th>
<th>Lingua Base size: 117 respondents</th>
<th>Minerva Base size: 119 respondents</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase the European &quot;outlook&quot; of individuals and institutions.</td>
<td>64%</td>
<td>60%</td>
<td>90%</td>
<td>85%</td>
<td>79%</td>
<td>88%</td>
</tr>
<tr>
<td>Increase and sustain co-operation amongst institutions/organisations.</td>
<td>85%</td>
<td>83%</td>
<td>83%</td>
<td>80%</td>
<td>87%</td>
<td>80%</td>
</tr>
<tr>
<td>Increase capacity for mobility of participants.</td>
<td>00%</td>
<td>00%</td>
<td>00%</td>
<td>73%</td>
<td>67%</td>
<td>81%</td>
</tr>
<tr>
<td>Improve quality of teaching/curricula.</td>
<td>81%</td>
<td>70%</td>
<td>71%</td>
<td>67%</td>
<td>76%</td>
<td>74%</td>
</tr>
<tr>
<td>Improve teaching/teacher training practice, approaches to learning and management</td>
<td>72%</td>
<td>71%</td>
<td>74%</td>
<td>72%</td>
<td>78%</td>
<td>73%</td>
</tr>
<tr>
<td>Improve the employability/adaptability of participants.</td>
<td>60%</td>
<td>70%</td>
<td>68%</td>
<td>61%</td>
<td>64%</td>
<td>60%</td>
</tr>
<tr>
<td>Increase the teaching and learning of EU languages</td>
<td>65%</td>
<td>68%</td>
<td>48%</td>
<td>76%</td>
<td>35%</td>
<td>58%</td>
</tr>
<tr>
<td>Lead to greater transparency and recognition between member states of curricula, study programmes</td>
<td>58%</td>
<td>78%</td>
<td>43%</td>
<td>33%</td>
<td>46%</td>
<td>52%</td>
</tr>
<tr>
<td>Lead to the integration of methods/tools/frameworks into national (regional) policy and practice.</td>
<td>64%</td>
<td>55%</td>
<td>52%</td>
<td>42%</td>
<td>42%</td>
<td>51%</td>
</tr>
<tr>
<td>Improve the employability and adaptability of participants facing disadvantage.</td>
<td>31%</td>
<td>41%</td>
<td>46%</td>
<td>25%</td>
<td>33%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Source: Ecotec surveys of Socrates II Actions, 2007. Scores include 'strongly agree' and 'agree'.
Key challenges of European projects

The administrative challenge

- Rather rigid administrative requirements
- Very detailed content, technical and financial planning at application stage
- Obligation to comply with the original project plan (on which the funding agreement is based) to an extent which is not usual in other projects
- Rigid regulations versus the dynamics of a diverse and cross-cultural project team.
The cooperation challenge

To systematically exchange experience or jointly develop an educational product of high quality in so-called “mixed partnerships” with professionals from different institutions with

- diverse motifs,
- diverse interests, and diverse
- organisational cultures

is not an easy venture, nor is it the way things are normally done.

Transnational cooperation requires a specific set of values and the development of new working processes!
The team challenge

- Not only diversity of institutions involved, but also diversity of people

- A group of professionals with different expertise, experience, age, status, etc., who may work together for the first time must be transformed into a performing team which is capable of delivering results under high pressure of time.
Key challenges of European projects

The virtual challenge

- Geographically spread project team
- Only few face-to-face meetings
- Much of the collaborative work must be organised virtually, with support of internet-based communication and collaboration tools
- Application skills in information and communication technologies are critical
Key challenges of European projects

The quality challenge

- High quality expectations of the funding programme

- Expected contribution to improving the quality of education in Europe by developing and spreading high quality products or providing a systematic overview what is going on in a thematic field at European level

- Level of funding does not always correspond with these high expectations
The impact challenge

- Expected to have an impact not only on the project consortium and its immediate environment, but on the educational sector concerned.

- Neither the EU funding programme nor national authorities offer very much support to project actors to reach their target groups and have an impact.
The intercultural challenge

- Often underestimated: cooperating with colleagues from other European countries entails an intercultural challenge.

- Different values, norms, and cultural habits, as well as different work cultures in participating countries often lead to misunderstandings or delays.

- Education systems in Europe vary considerably: a time-consuming process of approaching and understanding each other’s work realities and contexts and developing a joint working terminology is necessary, and rewarding....
(A Survival Kit for European Project Management)
Some project management tools

The Art of Networking.
European Networks in Education

Resource Pack for Networkers

www.networks-in-education.eu
Some project management tools

Guidance publication

Virtual Intercultural Team Tool

www.intertool.eu
Project planning

PLANNING
Much work remains to be done before we can announce our total failure to make any progress.

www.despair.com
The importance of project planning

Planning 80%

Implementing 20%
The project management cycle

However burdensome the application may have been, planning is not finished with the selection decision, but remains an essential part of a recurrent process:

- Scoping
- Planning
- Deciding
- Controlling
- Implementing
Overview of planning tasks

<table>
<thead>
<tr>
<th>Aspects of planning</th>
<th>Planning tasks after project approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning the organisation of the project</td>
<td>• Detailed planning of the work packages</td>
</tr>
<tr>
<td></td>
<td>• (Re-)defining roles and tasks</td>
</tr>
<tr>
<td>Planning contacts within the environment of the project</td>
<td>• Analysing the project environment</td>
</tr>
<tr>
<td></td>
<td>• Planning marketing and dissemination activities</td>
</tr>
<tr>
<td>Planning human interaction</td>
<td>• Setting up a suitable internal communication system</td>
</tr>
<tr>
<td></td>
<td>• Creating ownership</td>
</tr>
<tr>
<td>Planning internal financial and contractual arrangements</td>
<td>• Designing partner agreements</td>
</tr>
<tr>
<td></td>
<td>• Devising reporting systems and procedures</td>
</tr>
</tbody>
</table>
Update of the project plan

• The application phase was a long time ago!
• It is therefore necessary to make a **review and fine-tuning** of the planning steps agreed to in the application phase:
  • Partner roles
  • Allocation of concrete tasks
  • Timing
  • Financial aspects
Planning tools (I)

Gantt Charts

Work packages sheets

Milestones

Stakeholder analysis and force field analysis

are tools for more detailed planning,
help structuring the project in smaller units,
give a clear picture of the overall project,
have a potential for evaluation and dissemination,
and can be used for risk management.
A Gantt chart is a bar chart with
- the horizontal axis time
- the vertical axis activities
- responsible people (optional)

It shows
- the sequence,
- overlappings and
- sometimes interdependence
of tasks and can be a warning system for critical phases.
# Planning tools (III): Work package sheets

<table>
<thead>
<tr>
<th>Work package:</th>
<th>Duration:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsible person / team:</td>
<td></td>
</tr>
<tr>
<td>Aims and objectives</td>
<td></td>
</tr>
<tr>
<td>Activities and deadlines</td>
<td></td>
</tr>
<tr>
<td>Responsibilities/tasks</td>
<td></td>
</tr>
<tr>
<td>Outcomes</td>
<td></td>
</tr>
<tr>
<td>Boundaries and intersections with other work packages</td>
<td></td>
</tr>
<tr>
<td>Resources and materials to be used</td>
<td></td>
</tr>
<tr>
<td>Costs/budget</td>
<td></td>
</tr>
</tbody>
</table>
Milestones

- mark the end of significant phases of a project
- are possible turning points: go, no-go, return decisions
- can be a motivating factor if they are “celebrated”
- should be timed in line with project meetings and reporting deadlines
Planning tools (V): Stakeholder analysis

Project team: coordinator + team members

- Beneficiaries
- Direct users
- Commission
- Colleagues
- Organisation
- Media
- Competitors
- Authorities
Planning tools (VI): Stakeholder analysis

A project is more than its immediate team members, it has got an environment which can influence the course of the project!

A detailed stakeholder analysis has a great potential for

• Project evaluation (evaluation committee, peer review)
• Dissemination
• Risk management
Planning tools (VI): Force field analysis

A project establishes its own social system with

- social factors (people)
- objective factors (time, money, legislation..)

which can either positively or negatively influence the project’s success.

These influences should be taken into account in a force-field analysis.

Steps should be taken to counter and minimise possible negative effects (risk management).
### Social factors which could influence the project’s success:

<table>
<thead>
<tr>
<th>Individuals and institutions</th>
<th>Expectations fears, hopes</th>
<th>Attitude to the project 😊😊😊</th>
<th>Importance of the influence rated 1-5</th>
<th>Steps to be taken</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Objective factors which can influence the project’s success:

<table>
<thead>
<tr>
<th>Factor</th>
<th>Possible influences</th>
<th>Importance of the influence rated 1-5</th>
<th>Steps to be taken</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Little planning mistakes can happen …

„Great job! But shouldn’t we perhaps be a bit more detailed here?“

„A miracle is happening here.“
Ex-ante
The coordinator pays the full share of the grant to the partners at the start of the project and receives their reports at the end.

Step by step
The share of the grant is divided in several instalments. A clear timetable with deadlines for payments and progress reports is fixed.

Ex-post
Central financial management:
The partners pay for their expenses, send invoices and have them remunerated by the coordinator.
Indispensable for decentral financial management

- overall budget responsibility of coordinator
- precondition for controlling

Financial reporting should be combined with internal content reporting

Internal financial reporting must be in line with the requirements of the *Interim* and *Final Report* to EACEA

Financial reporting of total expenditure (EU grant + co-funding!)

*Survival Kit* reporting forms
Internal Reporting System: Requirements

KISS principle:
  **Keep It Short and Simple**

Double paperwork should be avoided.
  (system must be congruent with Final Report)

Uniform reporting sheets

Reports at regular intervals defined in the Partner Agreement

Reporting of challenges, obstacles, problems, and deviations from the plan rather than success stories
Financial reporting is an art in itself…
Internal contractual management

MAKE SURE YOU ARE HAPPY WITH THE CONTRACT BEFORE YOU SIGN IT
A written agreement between the project coordinator and the partners specifying the terms of cooperation within the project is obligatory.

Formal requirement, but no fixed model.

Degree of formalisation varies according to

- level of security the coordinator needs;
- attitudes of project partners;
- familiarity with the project partners.

Examples in the *Survival Kit* (no official models!)
Partner agreements can be a contribute to shared ownership by
- ensuring an equal information level and thus
- establishing a common working base,
- avoiding misunderstandings and wrong expectations.

However, partner agreements have a value for team building only if
- they are properly discussed,
- fully understood, and
- agreed upon
by all partners (at the kick-off meeting).
Partner agreements (III): Vital elements

- Project data: title, number, contractual period
- Full contact details of institution and contact person
- Obligations of coordinator and partners
- Allocation of grant and own resources
- Timetable and amounts of payments
- Bank details
- Internal reporting requirements
- Termination and damages for non-compliance
- Terms of modification of the agreement
- Applicable law
Partner agreements (IV): Annexes

- Grant agreement with EACEA incl. all annexes, particularly the *Administrative and Financial Handbook*
- Project application
- Work plan with detailed timetable and deadlines
- Forms to be used for internal reporting
- Copyright agreement (?)
- Team contract (?)
Management of the human dimension
A successful transnational project is
• not the coordinator‘s baby
• nor the European Commission‘s possession,
but should be „owned“ by all project partners.

Shared ownership means
• identification with the set project aims,
• active participation, and
• shared responsibilities
of all partners (ideally) from the application stage to the project‘s end.
A group of project partners is not a team yet. Successful (transnational) teams must be deliberately built. This process...

- is not linear;
- requires time, energy, sensitivity for cultural differences and the willingness to deal with differences and accept them;
- is often as rewarding as the work on the actual project content.
Good project teams...

- are supported by their home institutions
- are not too large
- have clear and common goals
- have team members with the complementary skills and expertise necessary for doing the job
- share responsibilities accordingly
- have agreed on basic rules how to work together
- respect intercultural and personal differences and deal with conflicts in a constructive way
Team process & communication system

Group process & effectiveness

Time

First meeting  Second meeting  Third meeting

Group process supported by virtual tools

Group process without support by virtual tools
Project communication modes

**Face to face**
- Project meetings
- Sub-groups
- Bilateral visits
- Conferences
- Seminars

**Distance**
- Telephone
- Phone conference
- Fax
- Letter
- Reports

**Virtual**
- e-mail
- Online conference
- Collaborative tools
- Weblogs
- Wikis
The appropriate communication system of a project depends on:

- Attitudes of team members towards communication media
- ICT skills and infrastructure
- Communication needs of the project

In any case the communication system should be carefully planned and consensually decided.

Team rules for communication should be established (frequency of communication, cc, acknowledgement of messages, reaction time, participation in face to face and virtual meetings...)

Project meetings

The highlights of most projects.

Good practice:
- 2-3 meetings / year
- 2-3 working days each
- rotating location

Types of meetings
- Kick-off meeting
- Working meeting
- Evaluation meeting
- Final meeting (often expanded to dissemination event)
Kick-off meeting

Critical for the success of the project

Normally held at the coordinator’s institution

Presentation of people, institutions and their experiences with and approaches at the project topic

Finding a common language

Making definite arrangements for the project work (aims, activities, communication system, reporting, financial issues...)

Discussing and consenting on partnership agreement

Doing things together apart from talking
Agenda is balanced:
  working time versus social activities
  contractual and financial issues versus content work

Agenda is not overcrowded.

Aims of the meeting are defined, realistic and communicated.

Agenda has been communicated before the meeting.

The working language(s) are discussed and agreed upon before the meeting (interpreter needed?)
Management of partner meetings

Designation of roles:
- chair person, content expert, visualizer, rapporteur, evaluator...

Visualisation and documentation of the process:
- flip charts, photo protocol etc.

Decisions in written form, clear consensus

Concise and complete minutes

Interim and final reviews of the aims / progress of the meeting:
  What have we (not) achieved?

Reviews of the language situation:
  Can everybody fully contribute?

Changing working methods:
  presentations, discussions, plenary / group work…
Do we really understand each other?
Holger Bienzle

die Berater
Wipplingerstraße 32/Top 24-26
1010 Vienna, Austria
Tel.: +43/1/5324545-0
Fax: +43/1/5324545-1145
e-Mail: h.bienzle@dieberater.com
www.dieberater.com

www.european-project-management.eu

www.networks-in-education.eu