Welcome to the Generativity training modules.

The project "Generativity – manage it!" has been funded with support from the European Commission under the Erasmus+ program Cooperation for innovation and the exchange of good practices, Strategic Partnerships for adult education.

The partnership is composed by: FEANTSA (Belgium) as applicant, Diciannove (Italy), Danmar Computers (Poland), European Evaluation Company (UK), Cardet (Cyprus), KEA and the University of Thessaly (Greece), FNARS (France), and FIOpsd (Italy).

Training module slides are composed of two parts: the body (focusing on key-points) and associated notes (which give more details, explanations and tips).

The body of the slides is in English because it is important to become familiar with the terminology and glossary from the perspective of an EU commission official; English is the more common language between applicants.

The slide notes are translated into partner languages to provide a more effective understanding of the major points in the slides.

Regarding the implementation of this training module: the original training module is by Paolo Brusa and Federica Cadeddu (Diciannove), this module was implemented by Danmar COmputers, revised by EEC and finalised by Danmar Computers.

Module 3

Building an international, national, local partnership

In this module 3 we will discuss aspects related to selecting your partners for the project. Choosing your partners is a very important task. You will need to work with your partners for probably two or more years in the project and you need to be sure that they are reliable and will deliver on time.

Obviously, there is also a matter of financial capacity as well as many other aspects, which are equally important.

This training set is a series of five modules and its purpose is to give an overview to European citizens on how to succeed with EU funding.

Module 0 provides an introduction to the Generativity project and to the essentials of Project Cycle Management (PCM) which is being used as an essential tool for EU project management success.

The first module of the training set explores issues concerning ways of selecting an appropriate EU funding programme. Module two provides information on how to structure an innovative and sustainable project idea.

In module three we will learn how to build partnerships. In module four we will find out about proposal submission procedures. Finally, module five explores issues facing the partnership when running a successful project after an application has been accepted.

In this module

Building an international, national, local partnership:
- ✓ What is a partnership?
- ✓ Building and effective partnership
- ✓ Finding good partners
- ✓ Partner communication and collaboration
- ✓ IT tools for project management

In this module, we will discuss things related to selecting your partners for the project. Choosing your partners is a very important task, you will need to work with your partners for probably two or more years in the project and you need to be sure that they are reliable and will deliver on time. Obviously, there is also a matter of financial capacity. And many other aspects, which are equally important.
So this module leads you to a better understanding of what a partnership is and what are the tasks it will have to satisfied. You will be guided to build your own partnership with some tips regarding IT tools that might be of help for the communication and the collaborative process.

A partnership is

An agreement between a group of participating organisations in different Programme Countries to carry out joint European activities or to establish a formal or informal network in a relevant field to foster inter-regional and cross-border cooperation

The first thing which needs to be clear in the process of building a partnership is what a partnership actually is.

Put simply it is a formal agreement between different actors across Europe to work together on a common goal.

In the following slides we will consider the various levels of a partnership: and the characteristics and qualities they should have; along with the kinds of tasks that will need to be done.

We will also consider how IT-based tools can help in building and sustaining a successful partnership.

A good partnership

A partnership-based project, particularly one with transnational cooperation, is more difficult than when the project is implemented by a single organization alone.

However, in return the project can generate unique experiences, broaden perspectives, and achieve better and more effective results.

Working with an international partnership is always more difficult than when the project is run by a single entity.
However, it does present a unique opportunity to broaden the experiences and perspectives of both the partnership and the project.

Building a partnership

- ✓ Fundamental requirement is the respect of the transnationality (minimum three countries)
- ✓ Partnership is led by the coordinator (applicant) who the other partners respond directly to
- ✓ Clear identification of the objectives
- ✓ Clear, unequivocal definition of tasks and benefits for all partners
- ✓ Quality of the partnership, which is generally one of the main evaluation criteria
- ✓ Verify partners' expertise, financial capacity and skills
- ✓ Agreement with the requirements set out in the call for proposal (geographical origin, legal status, membership of a particular category, etc.)
- ✓ Before starting, you should prepare a project template

6

Building a partnership is not always an easy task.

Usually there is a requirement to consider at least three different countries, but this may vary between projects.

There should be a clear reason why each partner is required in the partnership.

There should be clear identification of tasks and benefits for each partner.

It is the applicant's responsibility to verify its partners expertise, financial capacity and required skills.

It might be a good idea to prepare in advance a project template or summary which will enable partners to identify tasks and responsibilities within the proposal.

Finding partners

✓ Consider approaching both direct and indirect contacts
✓ get in touch with European networks
✓ participate in info-days and webinars
✓ visit databases for partner searching
✓ check credibility

Searching for the appropriate organizations is not always an easy task.
   You might already know some organizations who would be good for the proposal.
   Other means in getting in touch with different organizations might include
   contacting European networks, participating in webinars and live events.
   It is sometimes also worth visiting dedicated databases.
   It is always recommended to check the credibility of any organization.

Partner characteristics

Definition	written definition of partner requirements in terms of experience, curricula, skills, management, accessibility to networks, lobbying ability, financial capacity
Typology	identify an exact type of organization (public/private, large/small, service provider/lobbing agency, same/different sector)
Partner template	partners know about the others from their partner template
Financial resource	enough financial resources for a preparatory partners meeting/study visit
Proper searching	consider the kind of network and/or contacts used for searching

It is common among the organizations working in the European projects to have a sort of CV, which should give you an overview of what the organization represents and in what field the organization is working in.

You should identify the exact type of organization like a public, private , NGO, education, school, university

Organizations need to have sufficient financial resources for various activities.

It is also worth checking out if the organization is active in European projects and if you can find anyone who can recommend it.

Partner roles

Applicant	Participating organisation or informal group that submits grant application. Applicants may apply either individually or on behalf of a other organisations involved in the project. In the latter case, the applicant is also defined as coordinator.
Partner	Participating organisation involved in the project but not taking the role of applicant. Partners participate in designing and implementing the action, and the costs they incur are eligible in the same way as those incurred by the grant beneficiary. They must therefore satisfy the eligibility criteria as applicable to the grant beneficiary himself, in addition to any other criteria affecting partners.
Associated Partner	Other organisations from the public or private sector that can bring added value to the planned activities by investing their own resources and know-how. Such organisations will be considered associated partners and from a contractual perspective they are not considered as project partners and will not receive grant funding.
Sub-contractor	The grant beneficiaries have the possibility to award contracts to subcontractors. Subcontractors are neither partners nor associates, and are subject to the procurement rules set out in the Annexes to the standard grant contract.

Actual terminologies may vary between different programs and projects. But in general the following types of partners can be found in applications.
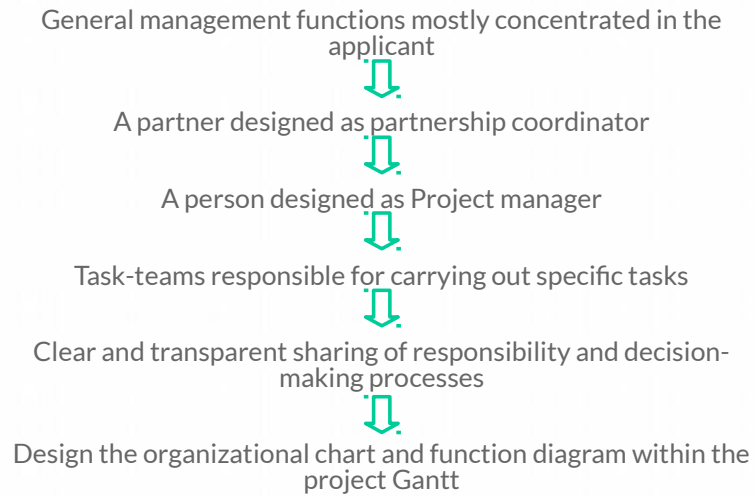
The applicant organisation is usually the organisation that submits the proposal. Typically the applicant also becomes the coordinator. The applicant needs to fulfil all formal requirements and have sufficient financial capacity to be able to run and coordinate a project.

Partner organisations usually have less responsibility than the applicant or coordinator. Partners are generally selected using various criteria to be able to fulfil specific tasks.

Associated partners are organisations which do not receive any financial support, but they are interested in the results and participating in the project activities.

The partnership represents a group of partner organisations that is submitting the project.

A subcontractor does not participate in the project but is typically selected via tenders to deliver specific services

Responsibility distribution

General management functions mostly concentrated in the applicant

⇩

A partner designed as partnership coordinator

⇩

A person designed as Project manager

⇩

Task-teams responsible for carrying out specific tasks

⇩

Clear and transparent sharing of responsibility and decision-making processes

⇩

Design the organizational chart and function diagram within the project Gantt

If your project is well structured and the partnership is coherent with the objectives and results you want to achieve, then the distribution of tasks will follow subsequently.

Tasks a partnership is built for

IMPLEMENTATION	▌➤	The partnership is based on the project implementation
MANDATE	▌➤	The clear definition of the mandate letter, which partners have to sign before applying, contributes to the entire path successful
INTERESTS	▌➤	Clear identification of common interests
COMMUNICATION	▌➤	The clear definition of the mandate letter, which partners have to sign before applying, contributes to the entire path successful
DISSEMINATION	▌➤	Identification, generalization and dissemination
EXPLOITATION	▌➤	Reception and exploitation of the results by the beneficiaries
MAINSTREAMING	▌➤	Systemic response of a transfer of innovation process

The decision making process should be clear for all their partnership from the implementation stage to communication, dissemination, exploitation and mainstreaming of the project outcomes.
The issue of dissemination, exploitation and mainstreaming will be considered in more detail in module 5.

Plans and actions

✓ BASICS - The partnership is based on the project implementation

✓ MANDATE DEFINITION - The clear definition of the mandate letter, which partners have to sign before applying, contributes to the entire path successful

✓ COMMON INTERESTS - Clear identification of common interests

✓ PARALLEL ACTION PLAN - Parallel action plans development for achieving project goals

✓ MUTUAL EXCHANGE - Foster advices exchange between partners, reply promptly and enlarge the mutual communication exchange of feedbacks

12

All partners should understand clearly the project goals and objectives.
In most programs partners are required to sign a so-called Mandate letter which enables the coordinator to act on behalf of all partners
The project proposal should be clear for all partners and it is crucial that partners work within their field of expertise.

Management and decision making

- ✓ CLEAR MANAGEMENT - Be clear at every step of the project, such as the implementation and management of the project, the administration and financial management

- ✓ MUTUALITY RULES - Establish as soon as possible mutuality rules with regard to decision-making, responsibility, disputes management

- ✓ DIVISION OF TASKS - Promote free and clear allocation of skills and experiences to empower all participants

13

It is the coordinator's responsibility to be clear at every step of the proposal - especially in the areas like a management, administration and finances.
Special attention needs to be given to less experienced partners who might need more time from the coordinator.

Communication

When?

Develop a proper internal communication strategy at the very beginning of the project in order to:

Why?

✓ Encourage sharing of project objectives
✓ Ensure the transparency of implementation processes
✓ Allow the timely evaluation of project progress
✓ Highlight promptly any remarks

14

Imagine managing a project without any form of communication.
Unless you're producing something on your own and for yourself, it would be wholly impossible because projects are often complicated with various layers of details, requirements, and decisions.
Each step often requires a new task to discuss, because it's dependent on another task or decision—or even another person.
Sure, you can make it so all of those decisions are funneled through your favorite project management planning tool, but just a plan or a tool won't help you to complete a project successfully.
In order to be a successful project manager you have to use your communication skills first, and the tools second. [www.teamgantt.com]

Communication media

e-mail contact	adequate, punctual and accurate replies to contact emails
decision-making	immediately definition of contact and decision-making processes
deadlines	clear definition and respect of the deadlines

In European projects it is critical to have good communication in the partnership.
If the partner is not responsive at the proposal stage it may mean that this organization will not behave well when running the project.
Responses should be quick, precise and on topic. It is also worth mentioning that public and large organizations might have complicated decision making process which might slow everything down.
Project deadlines are critical and a partner who ignores them may jeopardize the future of the partnership

Plan for communication and Collaboration

Establish a communicative plan that includes:

1. Activity and project implementation
2. Distribution of responsibility
3. Timing
4. Channels and tools

In project management communication plays a vital role, it is one of the comer stones of collaboration and greatly contribute towards the success of the project.

As a project manager it is important to see that the communication between the people involved in any projects have continues flow without interruptions and it involves all the participants.

Organizations could use different methods of communication like email, Skype, daily quick update meetings, weekly project status update meetings etc.
[http://www.projectcoordinator.net]

IT tools for project management

Increasing communication channels on social media
DOES NOT necessarily increase communication or
collaboration between partners.

Better to choose a SINGLE channel!

Examples of popular IT tools for project management:
- ✓ Wrike,
- ✓ Basecamp,
- ✓ AdminProject,
- ✓ others

17

Successful project managers understand the importance of time management.
The tools and techniques can make your project management more productive.

As an example, we would like to present one IT-based project management tool in a little detail:

More functionality and details are available at
https://www.adminproject.eu/

Having the expertise, IT skill base and extensive experience in international projects, Danmar Computers has designed and developed a project management system called AdminProject.

It is currently the only product on the market dedicated to the management of European projects.

It is a collaborative platform that puts all the tools you could need to replicate your project in our on-line workspace.

Delegate, plan and control your work

☑ Task:	Create orientation course curricula		

Last edit	Susanne Tonny	Priority	⊕ Normal
Start date	01.09.2016	Approved	No
End date	16.09.2016	Progress	85%
Assigned by	Anthony Breitling		
Part of IO	- none -		

|	
Responsible	Susanne Tonny (70%), Richard Somey (100%)
Description	Richard, please develop course curricula, work with Susanne please.
Linked files	curricula example.pdf

Link a file

The tasks module is the very core of management.
Every user in the project can assign a task to another person – or to a group of people.
You can define deadlines, link files, select to which work or output package the task belongs.
Tasks management comes with unique feedback mechanism, which allows progress to be tracked and the quality of the work being done to be monitored.

Share files, and put security concerns aside
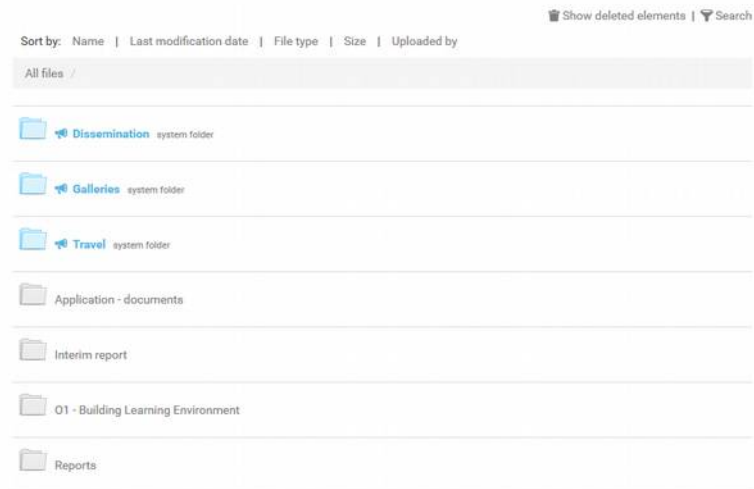
The files module is a centralized file storage area that is absolutely essential for any project manager.
You can create unlimited numbers of folders and sub-folders to keep your data organized.
There is a versioning mechanism behind the scenes so you have access to previous version of the files as well.
You can filter and search for files, using several criteria.
A unique feature allows you to link that have already been uploaded files to other modules.
To keep all your data in one place there is even a gallery module.
All files are protected, and you can also safely undelete lost files.

Organise dissemination activities with just a few clicks

Activity name: Distribution of leaflets and brochures in Centras Madrid

Who?	B&P	Level?	Regional
How?	Event	Where?	Madrid
When?	02.09.2016	# of people?	94

Activity description (please include activity URL if relevant)

The file attached is a list of people present and reached by this dissemination action.

Target groups

Beneficiaries of other projects

Impact of the activity

Impact of this activity was quite big, as Centras Madrid is an umbrella organisation and will pass the information about the project on to its members.

Feedback received

Feedback received was very positive with collaboration ideas for the future.

Evidence

B&P_Participants1.txt

Upload evidence

21

The dissemination module is another unique feature, favoured by many users.
It allows you to report your dissemination actions, add evidence (like photos or scans) and describe what was done.
As the coordinator you can track progress of entire partnership.
Any time you can generate a report which will contain all actions per partner, presented in a single Word file.

Manage your staff expenses without extra effort

Timesheet for Susanne Tonny

Period	09.2016

Activities

Date	IO	Activities	Days
01.09.2016	O1	Working on the Research Plan	0.25
02.09.2016	O1	Preparing research questionnaire (draft)	0.25
05.09.2016	O1	Implementing partners' feedback to the questionnaire	0.5
		Total days:	**1**

Add a new activity

The time-sheets module is another feature that is rarely found in other project management systems.

As the coordinator you need to define project partners and their daily rates and ask people to fill in their own time-sheets.

When the time for producing your reports comes you can simply hit a green button to get a nice report.

As a bonus, if you have more than one project in the system you can automatically check whether partners have mistakenly entered the same date in two or more projects.

follow the project on
www.generativity.eu

Presentation template by SlidesCarnival
Photographs by Unsplash
Watercolor textures by GraphicBurguer

Original training modules by Paolo Brusa and Federica Cadeddu (Diciannove), revision by Dave Oborne (EEC)
All text are licensed under Creative Commons BY_NC_ND_4.0 Attribution.Non Commercial. No Derivatives international

In next module 4 we will consider issues relating to the proposal submission to ensure a successful outcome