MOBILITY PROJECT MANAGEMENT IN PRACTICE

KEY ACTION 1 OF THE ERASMUS+
SCHOOL EDUCATION FIELD

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INTRODUCTION

In creating this publication, we started with the premise that a well-planned project – in other words, one that meets the needs of the applicant – requires good preparation also in terms of management. We have therefore decided to collect in one place information on the key elements of management and the possible directions that the preparations for the implementation of an Erasmus+ mobility project should take.

However, this is not a manual, but a guide – full of examples and practical comments, with exercises and tips related to each phase of the project lifecycle. This is the first, but certainly not the final, version of this publication, as it is your project experiences that inspire us

to address issues that have not yet been clarified. On the basis of these observations, we will try to supplement the content of each chapter in the future, so that the guide remains up-to-date and provides answers to as many questions as possible that arise already at the stage of looking for a project idea.

We hope that the publication Mobility Project Management in Practice. Key Action 1 of the Erasmus+ School Education Field will provide you with an insight into the different phases of project lifecycle and help you understand what constitutes effective management of educational projects. We also hope that this reading will contribute to successful mobility projects – and more.

Erasmus+ School Education Mobility Team

Please note that the formal rules for the application and implementation of projects may vary slightly for subsequent calls under the 2021-2027 perspective. Therefore, please use the latest documents for a specific call for proposals, available for download on the European Commission's website: erasmus-plus.ec.europa.eu/erasmus-programme-guide and the National Agency's website: erasmusplus.org.pl.

ERASMUS+: OFFER OF THE PROGRAMME, SCHOOL EDUCATION FIELD AND KEY ACTION 1

The Erasmus+ Programme is an important element of the EU Youth Strategy, the Digital Education Action Plan and the EU Work Plan for Sport, all of which are being implemented under the new EU financial perspective (2021–2027). The main premise of Erasmus+ is to provide citizens of the European Economic Community with the opportunity to acquire the knowledge and competences necessary in a rapidly changing society that is becoming increasingly mobile, multicultural and digital. The programme's budget exceeds €26 billion. These funds are intended to provide citizens of the EU Member States with the opportunity to improve their competences in every area of social life.

Objective of the programme

By providing the conditions for the development of education, training and lifelong learning opportunities, Erasmus+ supports the educational, professional, physical and personal development of children, youth, and adults in Europe and beyond. In this way, it contributes to sustainable economic growth, the creation of quality jobs and social cohesion, the introduction of innovation and the strengthening of European identity and active citizenship. The programme is a key tool for building a European Education Area, supporting the implementation of European strategic cooperation in the field of education and training and, together with the underlying sectoral programmes, it contributes to creating a European dimension in sport and to strengthening cooperation in the area of youth policy as part of the EU Youth Strategy 2019–2027.

Specific objectives

➲ to promote individual and group learning mobility of pupils, students, adults and educational and sports staff,
➲ to promote informal and non-formal forms of learning and active participation of young people in civic life,
➲ to develop transnational cooperation between institutions based on activities aimed at social inclusion, equalise access to education, provide creative and innovative solutions for educational institutions and organisations and education and training policies

The objectives of Key Action 1.

To strengthen the European dimension of teaching and learning by:
➲ promoting values such as: social inclusion, diversity, tolerance and participation in democratic life,
➲ disseminating knowledge about the common European heritage and diversity,
➲ supporting the development of professional networks across Europe.

To support the creation of a European Education Area by:
➲ building the capacity of schools to engage in cross-border exchanges and cooperation and to implement high-quality mobility projects,
➲ creating a real opportunity for every pupil and staff member to go on an educational trip during their time at school,
➲ supporting the recognition of learning outcomes acquired by pupils and staff during mobility abroad.

Erasmus+ priorities for 2021–2027

Erasmus+ does not operate in a vacuum. Projects implemented under this programme should respond to the needs and challenges of the modern world – educational, social, economic. Their identification is facilitated by priorities, which are divided into: horizontal – applicable to all Erasmus+ projects, and sector-specific – relating to a particular area and level of education.

The Erasmus+ horizontal priorities are:

➲ **Inclusion and diversity** – Erasmus+ is for everyone, regardless of origin, skin colour, gender, orientation, religion, health, economic status, education, or place of residence. The programme's creators placed particular emphasis on involving people who are disadvantaged due to health, economic or geographical reasons;

➲ **Green Erasmus+** – i.e. caring for the environment and fight against climate change. The programme's projects are meant to be an instrument for raising awareness of climate change, promoting sustainable development and shaping pro-environmental attitudes, such as reducing the carbon footprint by using sustainable means of transport;

➲ **Digital transformation** – i.e. transforming analogue processes into digital ones. New technologies are playing an increasingly important role in education. Erasmus+ projects should support the development of generally accessible digital education in teaching and learning at all levels of education in order to effectively bridge the competency gap and develop the digital capacity of schools;

➲ **Active participation in democratic life** – only active, informed citizens who identify with EU values will be able to face the challenges of the future. Initiatives under the programme should prepare them for this: pass on knowledge, teach understanding of diversity and respect for social, cultural and historical heritage of the European Union, encourage civic engagement and increase participation in democratic life.

The sector-specific priorities are achieved not so much by organising trips to improve specific competences, but by implementing the knowledge gained, sharing good practices and improving the quality of the work of the institution once the participants have completed their mobility. The priorities in the School Education field are:

➲ eliminating the phenomenon of early school leaving and learning difficulties as well as improving basic skills,

➲ supporting the professional development of teachers, principals and other school staff,

➲ developing key competences,

➲ promoting a multifaceted approach to language teaching and learning,

➲ raising interest and achievement levels in technical, engineering and mathematical subjects,

➲ developing high-quality early childhood education and care systems,

➲ recognising learning outcomes acquired during educational trips abroad.

The priorities are defined each year by the European Commission. They can be found in the constantly updated programme guides and on the Erasmus+ website. It is worth knowing them, as the assessment

of a project depends largely on how well it meets the granting authorities' guidelines. These include: the European Union, the European Commission (its main executive body), and the National Agency for the Erasmus+ Programme and the European Solidarity Corps (hereinafter referred to as the National Agency).

Under Key Action 1 in the School Education field, it is possible to receive a grant for pupils and school staff to go abroad for educational purposes.

Key Action 1 – for whom?

In the School Education field, this Erasmus+ action supports schools and other organisations working in the area of school education that want to organise learning mobility for pupils and school staff, as well as for regular collaborators of institutions implementing projects under the programme.

Good to know

⮥ Schools and organisations run by natural persons or civil partnerships can also participate in the new edition of Erasmus+.

⮥ In Poland, the full list of types of institutions eligible to apply in the School Education field is approved by the Ministry of Education and Science. The list is published on the website of the programme**QR**.

⮥ School governing bodies (local authorities, NGOs, universities or ministries) can submit applications only as coordinators of a mobility consortium and therefore cannot benefit from grants under short-term projects.

Erasmus+ website

E+

Ways to apply for funding

Applicants can apply for funding for a short-term project (KA 122 SCH). Institutions that have previously been accredited by Erasmus+ in the School Education field (KA 120 SCH) can apply for mobility under simplified rules. They only need to submit the budget application (KA 121 SCH) by the deadline set by the National Agency for Erasmus+ and the European Solidarity Corps (hereinafter referred to as the National Agency). The opportunities for mobility are exactly the same for both types of project. Eligible institutions may also join the programme without submitting an application, e.g. by joining an existing Erasmus+ mobility consortium or by hosting participants from another country. This form of participation does not provide for financial support. For detailed information on possible application routes, please refer to the Erasmus+ Programme Guide**QR** – the primary source of knowledge about the programme's possibilities.

Erasmus+ Programme Guide

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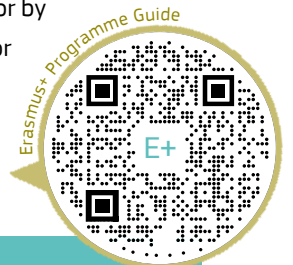
Remember

⮥ An institution accredited in the School Education field cannot apply for funding for a short-term project.

⮥ An institution that has received a grant for a short-term project in the first selection round in a given year may not receive funds for a subsequent project in the second round (if one is planned). However, it may apply for Erasmus+ accreditation in that field.

Types of mobility

The same types of educational trips can be organised under short-term or accreditation-based projects[1]:

For school staff,
the programme provides
the opportunity for:
➲ teaching assignment,
➲ participation
in organised courses
or training abroad,
➲ job shadowing
in a foreign institution.

pupils can participate in:
➲ group mobility,
➲ short-term
learning mobility,
➲ long-term learning
mobility.

The programme also includes inviting experts, hosting teachers and educators undergoing training or organising preparatory visits.

Good to know

➲ Erasmus+ schools are also encouraged to join the eTwinning programme, which enables them to create joint virtual classrooms and carry out projects with other schools, providing opportunities to exchange experiences with colleagues or find partners for future Erasmus+ projects.

➲ As of 2022, the eTwinning platform[QR] has become part of the European School Education Platform, which is a meeting place for all stakeholders in the School Education field: school staff, researchers, policymakers and employees of other actors in the field. The platform thematically covers all levels of compulsory education: from early childhood education and care to primary and secondary education and initial vocational education and training.

➲ You can access this tool by registering with the European Commission Authentication System and obtaining the EU login

eTwinning platform

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[1] For detailed information on the types of mobility, please refer to the Erasmus+ Programme Guide.

Accredited projects (KA 121 SCH) are designed for institutions or consortia of institutions eligible to participate in the programme that intend to organise mobility under Erasmus+ Key Action 1 on a regular basis. Submitting an application for accreditation (KA 120 SCH) is the only way to enjoy the privilege of organising learning mobility under simplified rules. The school gains a guarantee of funding and saves time. The call for accreditation applications takes place once a year and the document does not contain a specification of the budget or information about the hosting organisations. Experience in the Erasmus+ programme is not required, but at least two years of activity in the relevant area of education is necessary. It must also be demonstrated that the applicant organisation has sufficient financial capacity and staff resources to implement the planned activities.

It is worth remembering that in the School Education field one must submit, together with the accreditation application, the Erasmus+ Plan, which is a kind of vision for the development of the institution. The plan submitted covers a period of 2 to 5 years and can be updated periodically (after 12 months, the accreditation holder can update the Erasmus+ Plan to extend the project implemented under accreditation, hereinafter called an accreditation project, from 15 to 24 months). The award of accreditation to an applicant means that they have developed a high-quality Erasmus+ Plan.

If the National Agency awards accreditation, the organisation will be able to submit a simplified application for mobility funding in subsequent years. In such an application, it is sufficient to describe the type and number of activities planned in the following 15 months. Based on this, the National Agency will calculate the amount of the funding.

Once granted, the accreditation is valid until the end of 2027, but the National Agency can withdraw it if the beneficiary does not organise mobility for three years. Detailed information on this route of project implementation can be found at bit.ly/3raxMFU and bit.ly/3UIm1nF.

Good to know

- ⊃ Beneficiaries implementing Erasmus+ accreditation projects (KA 121 SCH) may apply to the National Agency during the project for additional funds (on top of those already allocated) from the envelope earmarked for exceptional costs. For more information, one should contact the project supervisor.
- ⊃ Accredited institutions do not have to apply for a mobility budget every year. They can even fail to apply for funding two years in a row and their accreditation will not be withdrawn. However, they are obliged to achieve the results they set out in their accreditation application. How they get there is largely up to them.
- ⊃ Each accreditation project lasts, by definition, 15 months. After one year, it can be extended to two years provided that the Erasmus+ Plan is updated.

Those who use the programme to a lesser extent can skip the accreditation effort – which only allows them to carry out **short-term mobility projects (KA 122 SCH)**. These last between 6 and 18 months and, due to the length of such an initiative, the number of mobilities is limited to 30. This is the best format for less experienced institutions or those who want to achieve simple objectives within a limited timeframe.

Until the end of 2027, any applicant that is not accredited in the School Education field can apply for funding for up to three short-term projects, seeking a budget to implement the specific activities planned in the project. This format is not available to institutions accredited in the field or to consortium coordinators.

Table 1. Comparison of selected elements of accreditation projects and short-term projects

Accreditation (KA 120 SCH) and accreditation projects (KA 121 SCH)	Short-term mobility projects (KA 122 SCH)
⊃ In the application for Erasmus+ accreditation (KA 120), no specific budget is presented, no partner organisations are indicated and the number of mobilities is not subject to an upper limit.	⊃ The applicant applies for funding of the planned budget for the implementation of specific activities included in the project, in cooperation with the institutions indicated, and the number of organised trips may not exceed 30.
⊃ Once awarded, the accreditation is valid for the whole duration of the programme.	⊃ By the end of the current Erasmus+ programming period, an applicant can carry out a maximum of three projects of this type. Each time, they submit a separate application, with no guarantee that they will receive funding.
⊃ Accredited organisations submit a simplified budget application within the deadline indicated by the National Agency, in which they specify the types and number of activities planned for 15 months. On this basis, the granting authority calculates the funding.	
⊃ In the event of a project extension, the Erasmus+ Plan submitted in the accreditation application may be adjusted.	⊃ Projects of this type are short-term, i.e. they last a maximum of 18 months.
⊃ The accreditation is long-term and the projects carried out under it (KA 121) generally last 15 months each.	⊃ This format is not intended for institutions accredited within a given field or for consortium coordinators.

Good to know

⊃ For detailed information on the offer, please refer to the Erasmus+ Programme Guide, updated each year by the European Commission and published on the Erasmus+ website[QR].

⊃ On this website, you can also check the deadlines for applications for accreditation or mobility projects.
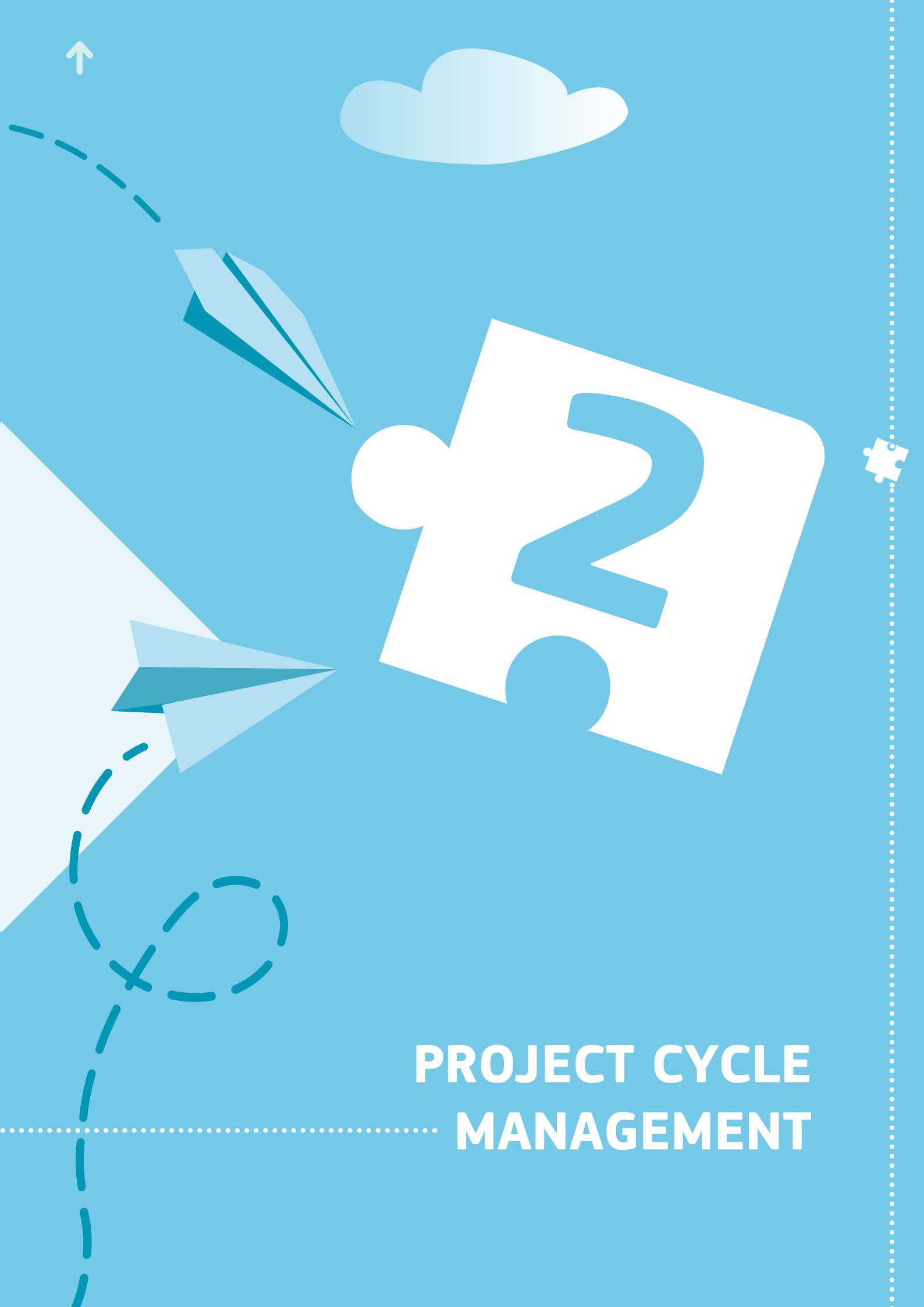
PROJECT CYCLE MANAGEMENT

In order to properly plan a project and meet the needs identified in the application, you need to prepare well for project management

2.1. WHAT IS PROJECT CYCLE MANAGEMENT?

In 1992, the project cycle management (PCM) model was developed for the implementation of projects financed from the European Union budget. The primary goal that guided its authors was to create a universal tool that would, on the one hand, make it easier for EU project coordinators to undertake the planned activities and, on the other hand, ensure the achievement of the objectives set by the granting authorities.

It quickly became apparent that the solutions proposed in the PCM not only excelled in achieving both goals, but also worked well in planning and running projects submitted by a wide variety of applicants – from schools and community centres run by local authorities, to the non-governmental sector and private operators. In addition, the PCM model allows EU bodies to manage changes following the completion of projects with similar themes or subsequent phases of grant programmes.

This is one of the reasons why cohesion policy is not merely an empty declaration, but an important element in integrating and developing the countries of the European Union, while at the same time making it possible to support individual Member States in areas which require intervention based on the EEC financial resources.

One element of this support is a model for the delivery of complex projects (the PCM model), which helps to clearly specify project objectives, tasks and outcomes while minimising the risk of failure. The model is based on the assumption that projects are cyclical in nature, i.e. they are closed plans of activities, the completion of which will lead to a specific outcome or solve the most relevant problems in the chosen field. Once these problems have been solved and the outcomes achieved analysed, the actors involved in the cycle undertake further activities based on the results developed and the experience gained, which will ensure further development.

Figure 1. Five phases of the project lifecycle according to the PCM model
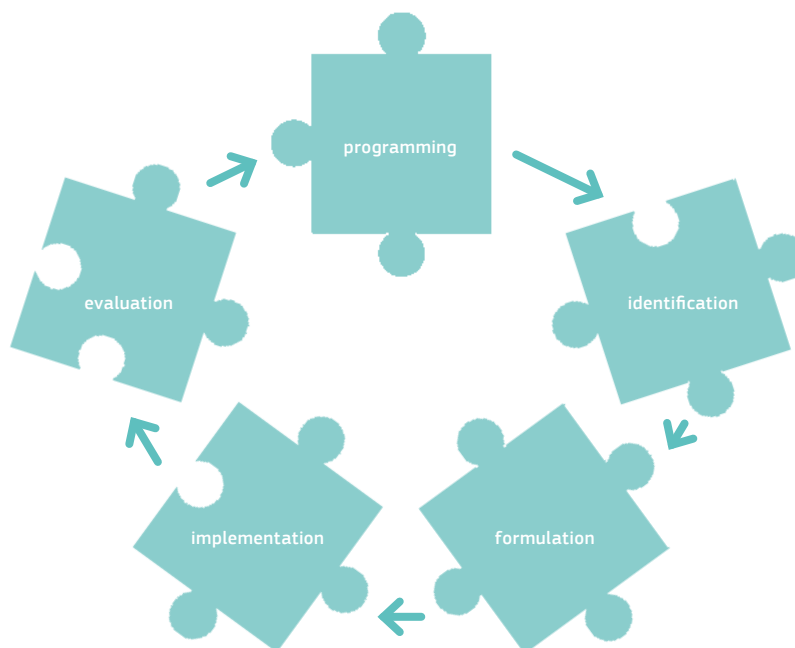
It is useful to learn about the project lifecycle phases in order to have a good understanding of what constitutes effective initiative management and, at the same time, to find out what actions are taken by granting authorities and Erasmus+ beneficiaries managing a project according to the PCM model

Table 2. Project lifecycle phases from the perspective of the granting authority and the beneficiary [*]

	Granting authority (institution implementing the programme)	Beneficiary (institution implementing the project)
Programming	➲ analysis of societal needs at European Union and Member State level, ➲ research and consultation, ➲ development of objectives for the next programming period, ➲ planning of expenditure and allocation of resources, ➲ development of grant programme elements (rules, requirements, tools).	➲ needs analysis at school, municipal or regional level, ➲ research and consultation, ➲ determination of a strategy of activities or directions of development.
Identification	➲ development of detailed call for proposals rules (regulations), ➲ training of implementing staff, ➲ provision of tools, ➲ training of applicants, ➲ selection of projects.	➲ analysis of the feasibility of the objectives (grant programmes, institutions applying for funds), ➲ creation of a project team, ➲ acquisition of strategic partners, ➲ obtaining information on the programme's offer, ➲ selecting a source of funding for the project.
Formulation	➲ final analysis of the selected projects, ➲ calls for supplementary documentation, ➲ provision of documents (beneficiary questionnaire, financial agreement), ➲ **signing of project grant agreements.**	➲ detailed analysis of the programme and call documentation, ➲ **development of the project,** ➲ preparation of the application form, ➲ submission of the application, with additional supplementation upon requestby the implementing institution, ➲ creation of project account, ➲ **signing of a project grant agreement.**
Implementation	➲ ongoing support for beneficiaries, ➲ training of beneficiaries, ➲ monitoring of ongoing projects, ➲ mid-term reporting.	➲ involvement of staff, ➲ recruitment of participants, ➲ implementation of planned tasks, ➲ mid-term monitoring and evaluation, ➲ mid-term reporting.
Evaluation	➲ analysis of project implementation reports, ➲ reporting.	➲ ex-post evaluation, ➲ final reporting.

[*] Note: The different phases of the project lifecycle do not always follow the same timeline from the perspective of the granting authority and the beneficiary.

Programming

At this time, information is gathered on the challenges facing individual Member States or specific sectors (science, culture, health, various branches of the economy and administration, environmental protection, education, etc.). This is the stage of identifying general challenges, based on more detailed research, numerous consultations and planning of expenditure for the next financial perspective.

Good to know

- ⮕ The budget of the European Union is planned for seven years – the current financial perspective covers the period 2021–2027.
- ⮕ The programming phase concludes with the setting of a seven-year financial framework, the allocation of funds to the various objectives to be achieved through activities carried out both by international and national institutions, as well as by individual applicants (e.g. schools or NGOs).

Identification

During identification, the selection among the submitted projects takes place. In other words, it is the stage at which selection decisions are made. The granting authority informs the applicant whether the proposed project will be awarded a grant or rejected on formal or substantive grounds.

In addition to meeting the requirements of the programme and the rules of the call for applications, the assessment process always takes into account whether the proposed initiative will ensure the achievement of the objectives set out at European Union level – in the case of the Erasmus+ programme, these are included in the horizontal priorities. It is also examined whether the problems presented by the applicant have been reliably and credibly analysed by the applicant and whether the proposed actions will resolve or mitigate them.

Remember

- ⮕ The planned project should not only meet your needs and those of the institution you represent, but also take into account the objectives of the European Union. Therefore, when planning the activities, and especially the outcomes of the project, take care of the needs of the participants in the project, consider the perspective of the organisation applying for funds, and at the same time make sure that the initiative is in line with the key objectives of the programme.
- ⮕ In the Erasmus+ programme, horizontal priorities must be considered at every stage of project planning (see pp. 11–12). They do not have to be project objectives, but should be taken into account in the activities planned and subsequently undertaken. For example, social inclusion can be pursued by setting appropriate recruitment criteria or involving in the project people at risk of exclusion.
- ⮕ In addition, the Erasmus+ mobility project plan should include the objectives of Key Action 1 of the School Education field.

The formulation phase is when the pre-selected projects take their final shape. This is when final adjustments can still be made to the project plan as a result of negotiations between the granting authorities and applicants.

Formulation

The process ends with the signing of a grant agreement. In Key Action 1 of the Erasmus+ School Education field, applicants of approved projects submit their data and individually sign agreements with the National Agency.

Implementation

Once the initial formalities have been completed, the real life of the project begins. During implementation, the project coordinators – i.e. the staff of the funded institution designated to manage the initiative – start to carry out the tasks included in the plan. At the outset, they select collaborators, whom they involve in project work. Throughout the implementation period, grantees of the programme shall strive to achieve the results listed in the application for funding.

From the granting authority's perspective, the implementation phase is a time to oversee the progress of funded initiatives, coordinate the settlement of funds and ensure that the way in which beneficiaries carry out their activities aligns with the above-mentioned priorities of the programme and the European Union. To this end, each programme makes use of the tools developed at the programming stage and the rules for periodic reporting (e.g. quarterly).

In the current financial perspective, reporting is done in the Beneficiary Module system. It is used to submit individual reports upon return from mobility. Periodically, the system is also used after the end of the project, e.g. when non-standard payments have to be determined.

Ranting authorities are obliged to verify the quality of each initiative. They look at both the achievement of the results declared in the application, the fulfilment of the formal and legal requirements set out in the grant

Evaluation

agreement, and the compliance of the implementation of the tasks with the objectives of the programme and the European Union.

The National Agency regularly analyses the achievement of objectives. Each year, it schedules monitoring visits to beneficiaries, carries out audits included in the grant agreement and evaluates mid-term and final reports. At the end of the financial perspective, it submits a report to the European Commission, which in turn may conduct an audit of the outcomes. This task can be carried out by the Commission itself or with the support of bodies designated for this purpose.

The information thus obtained makes it possible to make a final evaluation of the course of the programme. It indicates the extent to which the objectives set at the beginning of a given financial perspective have been achieved, how the situation in the supported fieldhas changed, and what objectives should be set for the next financial perspective.

Good to know

⮱ What is evaluation for a school implementing an Erasmus+ project?
The evaluation conducted after the project's completion (ex-post) should provide the beneficiary with information on whether the implemented activities took place as planned, what could have been done better (cheaper, faster or more efficiently) and how the project work results and lessons learned can be used in future school activities – related not only to Erasmus+, but also to everyday operations of the institution.

⮱ The mid-term/on-going evaluation should demonstrate:
• whether the current activities bring the institution closer to the objectives
set in the project plan,
• whether the efforts made are in line with the school's strategy,
• whether the results achieved are likely to yield greater benefits than those
set out in the application.

⮱ Evaluation of the activities undertaken during the mobility (e.g. teacher training trips or pupil participation in group mobility) will make it possible to check the level of satisfaction of the participants and the efficiency of service in the hosting institutions, the quality of the activities offered by them or the compliance of the implemented programme with expectations. This, in turn, will allow for any necessary modification of future trips, adjustment of plans and, in addition, reduce the risk of project failure and participant dissatisfaction.

The knowledge you gain from a thorough analysis of the outcomes of your project will allow you to plan future initiatives more precisely – they will be more interesting, better tailored to the needs of pupils, the environment of the school and its partners.

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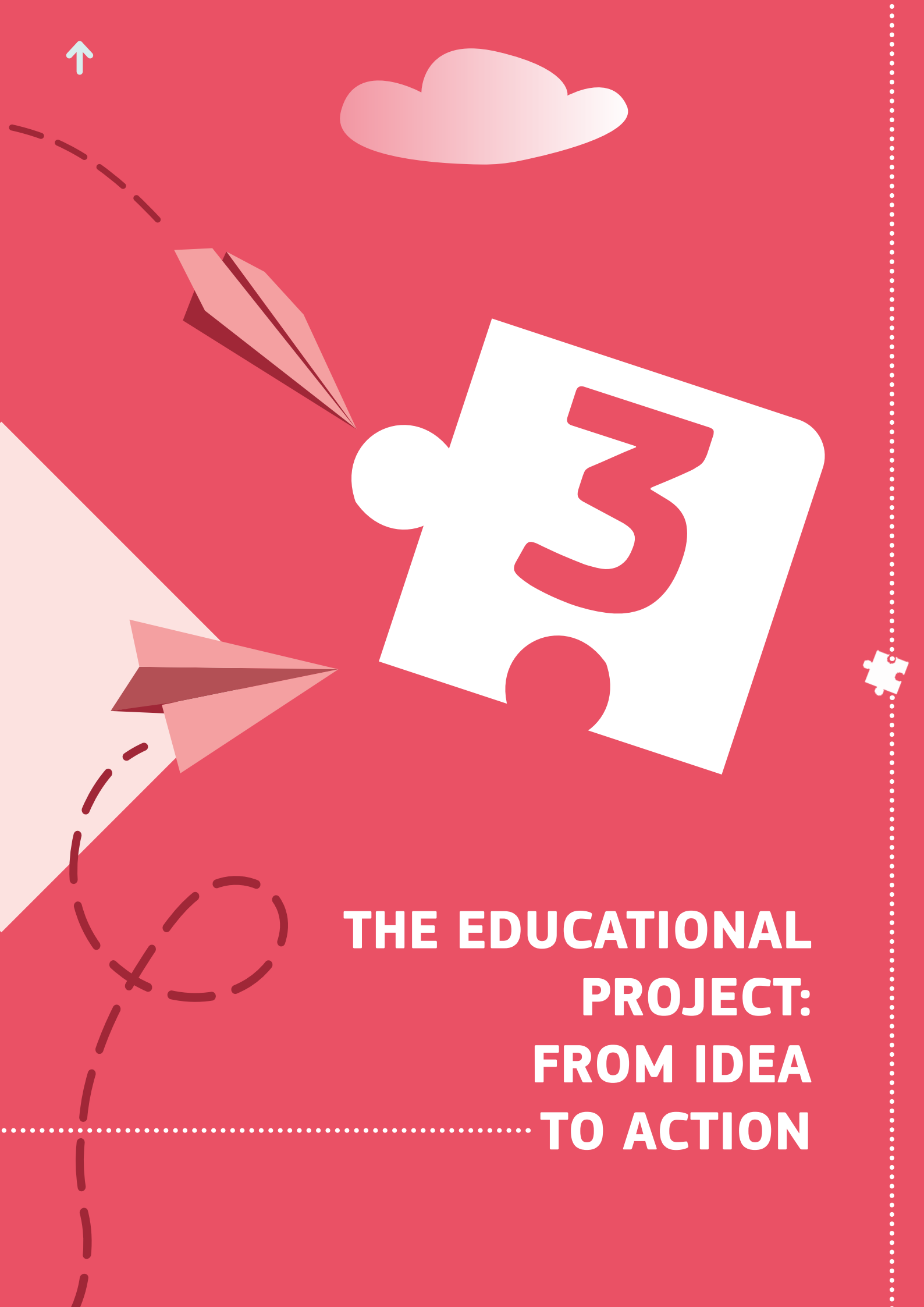
THE EDUCATIONAL PROJECT: FROM IDEA TO ACTION

3.1. DEFINITION OF AN EDUCATIONAL PROJECT

A project is an endeavour that is time-bound – it has a definite beginning and end – and focused on achieving high-quality results. Therefore, there is no room in the project plan for activities that do not contribute to the project objectives or do so only partially. The golden rule for the implementation of this type of project is that bringing about the expected change is possible only if funds, time, equipment and other resources are managed efficiently.

In order to effectively manage a project from the very idea, it is necessary, firstly, to ensure that all parties involved are aware of the needs and objectives set out in the project, and secondly, to carefully plan the various stages of the activities that will ensure the development of high-quality results.

There is no room for randomness in a project. Each activity should be optimally matched to a given objective so that, by implementing it step by step, a high level of project implementation can be achieved.

Project results are achieved by carrying out activities that derive from the objectives set out in the grant application, which in turn stem from the needs of the beneficiaries or affiliated parties. The effects of the activities can be both quantifiable – tangible results, e.g. five teachers completing a methodology course – and more subtle, while at the same time more difficult to capture and study. We call the latter soft results, and an example of these could be the increased interest of schoolchildren in democratic processes in the European Union.

Remember
- A project is an organised and time-bound sequence of activities aimed at achieving a specific and measurable outcome, targeting selected audiences and requiring the commitment of available physical, human and financial resources.
- The effect of a project is always a change from an undesirable situation to the desired one.

Figure 2. How ideas are brought to life in a project – from need to result

individual, institutional needs → project objectives → objective-oriented activities → project results
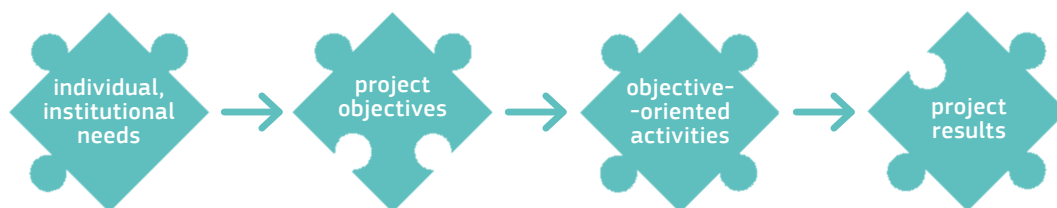
Remember
- When developing the next stages of the project, it is useful to return to those already discussed, as the information on one or more elements that were previously considered to be well-planned may require modification.
- It is a good idea to have the various elements of the project, as well as the application itself, reviewed by people not directly involved in its creation. This will help you to identify inaccuracies and possible errors, while benefiting from the knowledge and ideas of a wider range of people.

3.2. KEY FEATURES OF AN EDUCATIONAL PROJECT

First, let us consider what actually is an educational project? What characteristics determine its quality and distinguish it from the regular, repetitive activities carried out at school?

Uniqueness

An Erasmus+ project consists of a catalogue of activities designed to lead to results that cannot be achieved by carrying out everyday duties. It is supposed to produce the expected change – to new outcomes that cannot be achieved through tasks carried out in the same, time-tested way. The project plan must therefore include innovation in the form of methods, tools, or solutions not used in everyday work.

This is the fundamental difference between cyclical activities and project activities. A project is a response to specific needs or problems that are to be met, solved or minimised over a specified period of time.

Time constraint

The grant application should always indicate when the project will start and when specific outcomes can be expected. Therefore, the action plan must include specific deadlines for the implementation of substantive activities, monitoring, and evaluation of individual results.

Effectiveness

It is sometimes said that "a project should be implemented sensibly", but what does this actually mean? In practice, a cleverly designed initiative plan captures only those activities that contribute to achieving the expected results with the least possible investment – not only financial, but also in terms of the working time of those involved. An effective plan also excludes random activities that are not directly related to the objectives of the initiative.

Compatibility with the strategy or mission of the school and with the objectives[2] of the Erasmus+ programme

If the project activities fit in with the school's work concept, the results and products of the project will be part of the school's schedule for a long time. They will also be a source of inspiration for the planning of future activities. The experience will put good educational practices within reach, making it possible to use them both as part of regular work and during short projects, or even spontaneous activities such as a school picnic.

Do not forget about the programme's objectives in your

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[2] You can read about the objectives of the Erasmus+ programme in the Erasmus+ Programme Guide.

application. Erasmus+ is publicly funded, which means that only projects that fit with its core principles can be supported.

This is another characteristic of a good Erasmus+ project implemented under Key Action 1, where beneficiaries are not expected to produce tangible educational products or services. The sustainability of a project is the time during which the results of an initiative will be used despite its completion. In this way, its results can be used further not only by the beneficiaries, but also by other institutions looking for tried and tested ideas to enhance learning.

Sustainability of the results

Results dissemination plan[3] – this is a section of the application which should precisely define the activities leading to the perpetuation of the projects' results. This will ensure that the results of your work can be used in the future by a wide range of institutions

Remember

It is not enough to declare in the application that the results will be sustainable. You must present a concrete plan for the use of knowledge, methods or materials resulting from your participation in the organised events.

Added value

This project element is most commonly overlooked by applicants under Key Action 1 of the School Education field.

Consider what additional benefits the implementation of the planned activities can bring. These are the kind of effects that will be produced somewhat incidentally. It is important to be open to them and to be able to recognise and use them.

Every activity brings results – both those you plan and devote time to (e.g. developing a presentation for a workshop to prepare participants for the trip) and additional ones, without which the project would have still been successful in terms of its objectives. There can be added value, for example, in exchanging business cards with teachers from different countries whom you have met on a foreign training course. In the future, this could result in a joint eTwinning project, a job shadowing trip to a foreign school, a partnership project under Key Action 2 of Erasmus+ or a youth exchange.

3.3. PROJECT LIFECYCLE FROM A SCHOOL'S PERSPECTIVE

It is impossible to list all the functions and tasks facing a modern school. It is a place where pupils acquire knowledge, gain experiences, develop talents, overcome their own barriers and weaknesses, experience successes and failures – preparing for further study or work and, ultimately, for independence. Every pupil, parent, or teacher has their own list of aspirations and concerns regarding participation in school life.

In this respect, every school is unique – the requirements, relations and opportunities are different, the school environment is different, the partners and members of the immediate or wider school community are different.

Formulation

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[3] For more information on project dissemination, see p. 78.

Because of this, every school project is unique. It is developed in response to different challenges and is based on the original ideas, experiences, and abilities of participants and partners. These conditions are constantly evolving, making it impossible to carry out the same project twice.

However, there are some ways to structure the project implementation process. One of them is the PCM model presented in Chapter 2 (p. 19). There, we present the project lifecycle from the perspective of a school participating in the Erasmus+ programme.

Figure 3. Key stages in the lifecycle of a school project using the PCM model as an example

programming → identification → formulation → implementation → evaluation

Programming
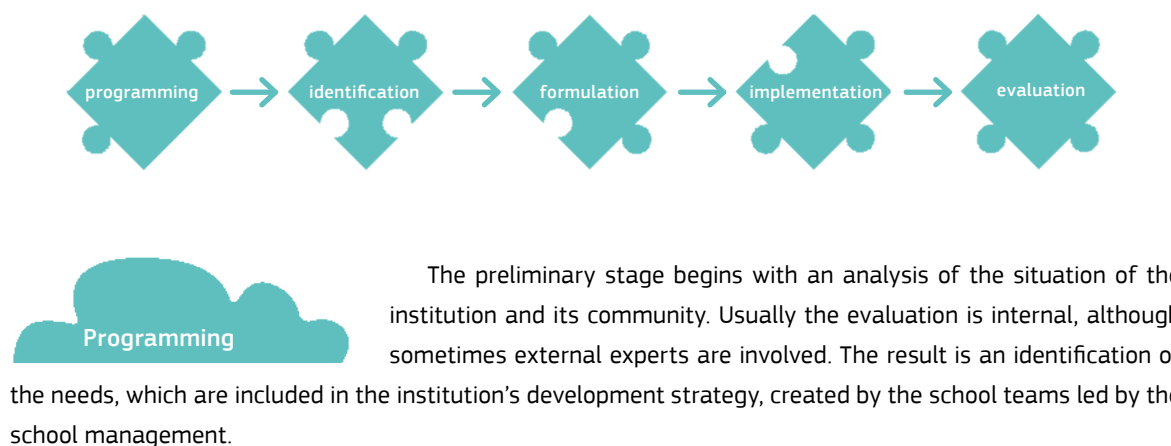
The preliminary stage begins with an analysis of the situation of the institution and its community. Usually the evaluation is internal, although sometimes external experts are involved. The result is an identification of the needs, which are included in the institution's development strategy, created by the school teams led by the school management.

Tasks designed to address the identified needs within an educational project become part of the Erasmus+ Plan. It is a vision of what your school will look like in a few years: what competences will be developed, how the classrooms will be equipped, what methods and tools will be added to the teaching instruments, what partners the school will work with to improve its effectiveness or facilitate the work of teachers and the learning of pupils, what position it will occupy in the rankings or in the local community.

The school's strategy included in the Erasmus+ Plan takes into account the needs, problems, priorities, objectives and desired actions that will ensure the institution's development at different levels.

Unfortunately, many institutions skip this stage or carry it out with insufficient diligence, underestimating its importance and assuming that the authors of future initiatives will analyse the relevant issues directly related to the specific project idea as part of their own preparation.

Omitting strategic planning may be tempting at first glance – after all, it is better to act rather than to dwell on a far-reaching vision, while pupils and school staff already need concrete measures and specific actions now.

As a result, the projects submitted often do not form a coherent whole, fail to exploit the potential of the social environment, are less satisfying and bring fewer benefits than would be possible with planning based on a broader list of objectives and values.

Therefore, even if you are already working on a specific project that you intend to implement in the near future, it is worth thinking about the extent to which your initiative fits into the specific nature of the institution, and to return to strategic planning to make your work more effective and rewarding.

Figure 4. Steps taken by the school during the programming stage

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Remember

➲ From the school's perspective, analysing the situation, creating a development strategy and preparing an Erasmus+ Plan are all part of the programming phase.

➲ The strategy is the foundation of the project. Can you build a house without a foundation? You can, but you should not expect it to be durable and fully functional.

Identification

In the second step, the school analyses opportunities for funding under programmes that support the development of education and ideas for activities that will become the backbone of the project plan.

In Erasmus+, it is certainly worth starting by exploring the activities that can be carried out with funding. These activities are briefly outlined in Chapter 1. They are discussed in more detail in the Erasmus+ Programme Guide.

In addition to contacting friendly schools that already have experience with the programme, it is certainly worth visiting two websites that are invaluable sources of information for Erasmus+ applicants and beneficiaries in the School Education field:

➲ **the Erasmus+ Project Results Platform**QR: it features descriptions of projects carried out by other institutions in different countries. If you like an idea, you may want to try to get in touch with a school that has already gained experience through a similar initiative and would be willing to share information to help you avoid mistakes. Contacting a foreign institution may, in time, develop into a valuable international partnership.

➲ **the European School Education Platform**QR: is the knowledge base about Erasmus+ school projects. It also provides the opportunity to get in touch with potential partner institutions, post cooperation offers (e.g. via eTwinning) and much more.
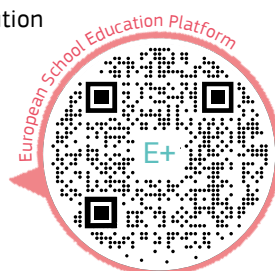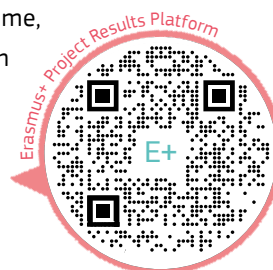
Remember

At this stage you make a preliminary analysis of the issues you want to address in the project, trying to gather as much information as possible about the expectations of the project's target audience, partners and other stakeholders (e.g. representatives of the school governing body, the local community or organisations with which the school cooperates or would like to cooperate).

Formulation

Now is the time to review what you have established so far and to check the application conditions (meticulously study the programme rules and guidelines, create a list of necessary attachments to the application, etc.). This is followed by the detailed formulation of assumptions and the development of the project. You are not filling in the application form yet, but you already know the instructions and answers to frequently asked questions. At this stage, it often turns out that many details still need to be checked and determined.

The formulation ends once you have drafted the project, filled in the application and enclosed the necessary attachments.

Remember

During the formulation process, you analyse the rules of the call for applications and, after becoming familiar with the instructions and the structure of the application form, you develop your project in detail. You fill in the form when you have prepared all the information in a "rough draft" and know what to write in each box.

Implementation

If your project is positively evaluated and your school qualifies as a beneficiary of the programme, it indicates that it is time to sign a grant agreement. In most projects in the Erasmus+ School Education field, the applicant receives 80% of the funding granted shortly after concluding the contract (the remaining 20% after the project is settled). This allows for smooth implementation of planned activities and covering current costs without having to commit own financial resources.

Good to know

➲ The grant is paid in euro, so we recommend setting up an account in this currency. This avoids currency conversion costs, which are non-eligible from the point of view of project settlement. This means that they cannot be covered by the funds for mobility projects. In addition, losses resulting from currency conversion can be treated as wasteful spending of public funds.

➲ Costs related to the foreign currency account may be covered by the grant under the cost category "organisational support".

Only now – after completing the work related to project preparation and applying for funding – do you start implementing the project activities you had in mind from the very beginning.

Carrying out a project takes place on several levels: financial, human resource, social, promotional. It consists of the following:

➲ proper management e.g. of the institution's staff,

➲ communication, not only with the project team and the mobility participants, but also with the school governing body, parents or potentially interested recipients of the activities undertaken,

➲ broadly understood dissemination of results, involving the sharing of acquired knowledge, its implementation and promotion.

Remember

Projects under Key Action 1 of the Erasmus+ School Education field are not only about organising mobility – which at first glance appears to be the main task of the initiative – but also about preparing participants for the trip and integrating the mobility outcomes into the work of the school.

Example

The participation of teachers in a course on the use of information and communication technologies in the school's work or its completion by a few teachers is not enough to consider a project effective. Of course, a certificate can be a valuable and expected outcome of the trip. However, if the project participants (in this case teachers) do not use the tools they have learned in their work, the completed mobility becomes meaningless. And why is that? Because neither the school implementing the project, nor its pupils, nor the rest of the teaching staff feel its benefits. The outcome of the project is supposed to be a tangible CHANGE (in this case of the quality of the school's work), not just the development of teachers' skills.

There is no doubt that the new competences of the mobility participants will have a positive impact on the school's work. However, the applicant must plan the extent of such a change in detail already at the stage of formulating the project assumptions. This change is subject to evaluation and therefore it must be precisely described in the project application.

The applicant is obliged to measure the effects of the initiative. The methods it chooses to do so depend on the theme of the project and the planned results. Among other things, the applicant checks whether all the

Evaluation

planned results have been achieved, whether the participants are satisfied with their participation in the project, and it also examines the project from a much broader, horizontal perspective. To this end, it may conduct an evaluation study, the results of which should:

- prove that the persons responsible for particular activities have fulfilled their responsibilities,
- indicate the mistakes made,
- identify the added value that could have been achieved and explain why some valuable activities and opportunities were missed,
- provide a basis for a needs analysis before planning further projects.

The knowledge gained in this way will certainly contribute to more informed work on future initiatives, and may even lead to the modification of the school's statutes or development strategy.

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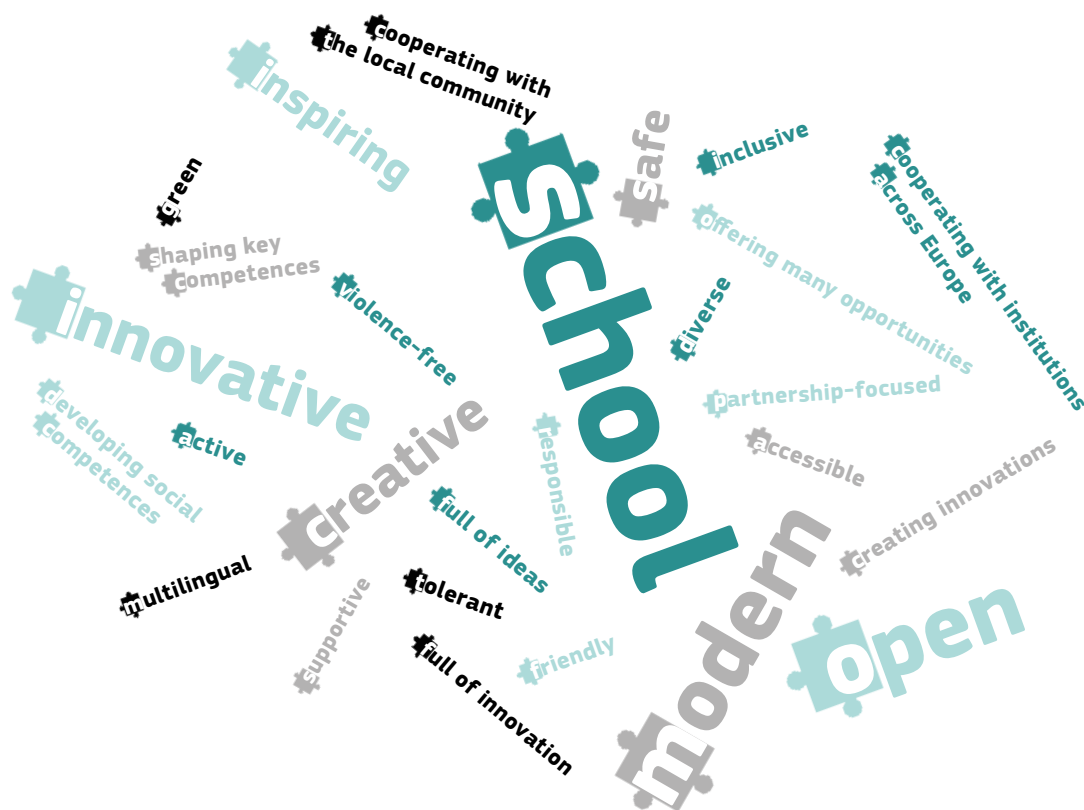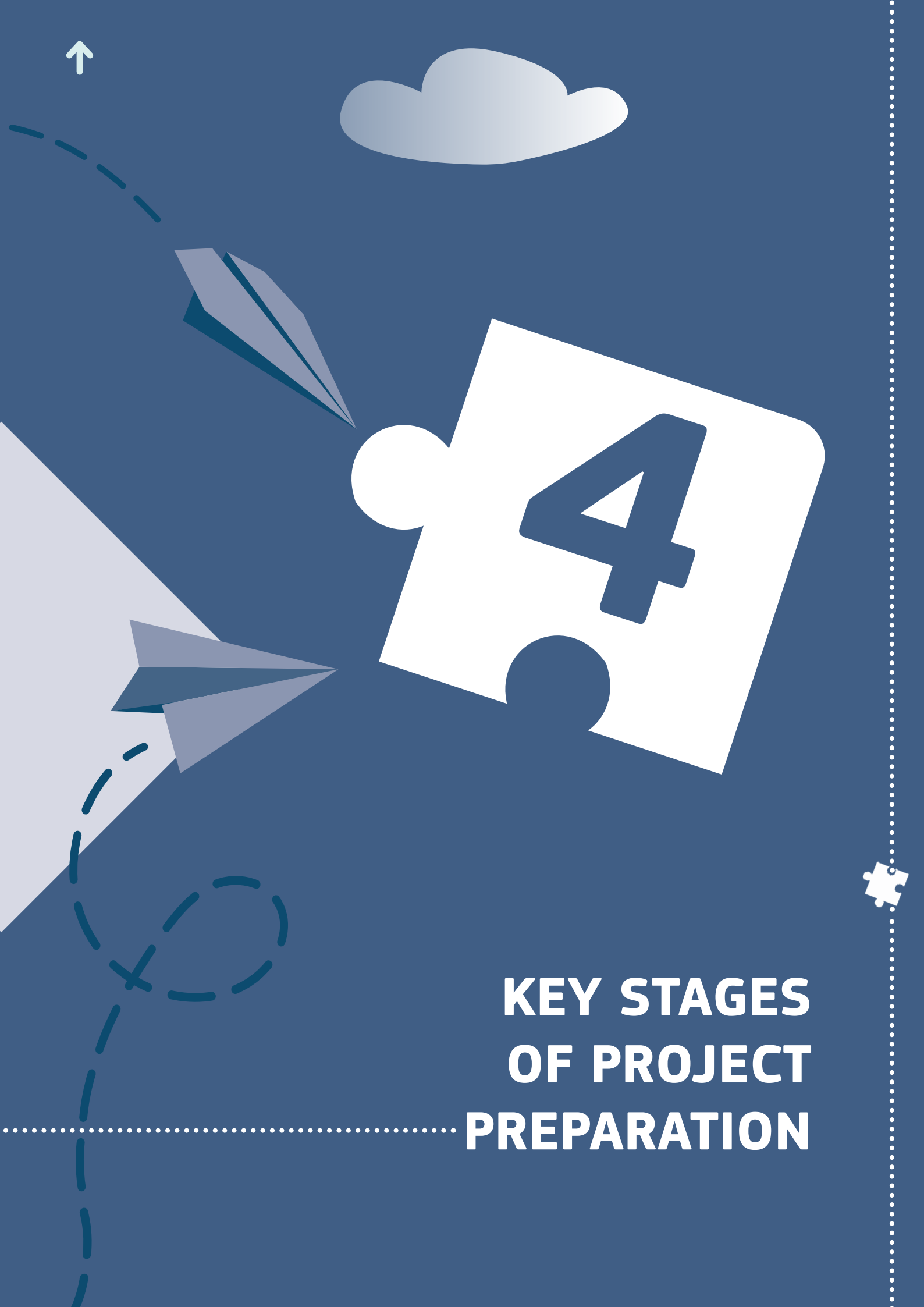
**KEY STAGES
OF PROJECT
PREPARATION**

Before embarking on a project, think what your institution will be like in a few years and what can contribute to achieving the desired state. Are all the necessary resources (money, knowledge, experience, appropriate staff, partners, superiors) already available? Strategic thinking helps to spot opportunities, avoid risks and achieve the best possible results with the optimum input of resources and work.

The following pages outline the key stages of preparing a mobility project in the Erasmus+ School Education field. Developed with due care, they guarantee the success of the planned initiative. In this chapter, you will also find examples, tips, and exercises that will certainly come in handy when preparing a grant application.

4.1. IDENTIFICATION OF NEEDS

4.1.1. SWOT ANALYSIS

Among the applications for the School Education field, there are often cases where only the activities the school intends to carry out are described. Information indicating the coherence of these activities with the institution's development plans is missing. Such a mistake reduces the chances of receiving funding, as the project should not only improve the competences of the participants of the trip, but also have a much wider impact – on the whole school community long after the activities have been completed. Planning mobility in this way will ensure, among other things, the sustainability of the results and the widespread use – also outside the school – of the skills acquired, methods learned, as well as materials and content generated during the activities.

Start your project planning with an analysis of your institution's situation.

A useful tool is the SWOT analysis, which is one of the basic methods for the strategic analysis of an organisation. The name of the method is an acronym for the following words:
- **S**trengths,
- **W**eaknesses,
- **O**pportunities (potential or existing opportunities in the environment)
- **T**hreats (probable or existing threats in the environment).

This type of study involves identifying the school's strengths and weaknesses, as well as opportunities and threats to its development. The source of opinion is not limited to the teaching staff. Pupils, parents, representatives of the governing body, organisations cooperating with the school and even representatives of the local community can also provide valuable insights. In smaller towns, the school is often the centre of social life – civic, cultural, sports. In the analysis, it is worth using the observations of people who visit the institution irregularly.

Figure 5. SWOT analysis diagram
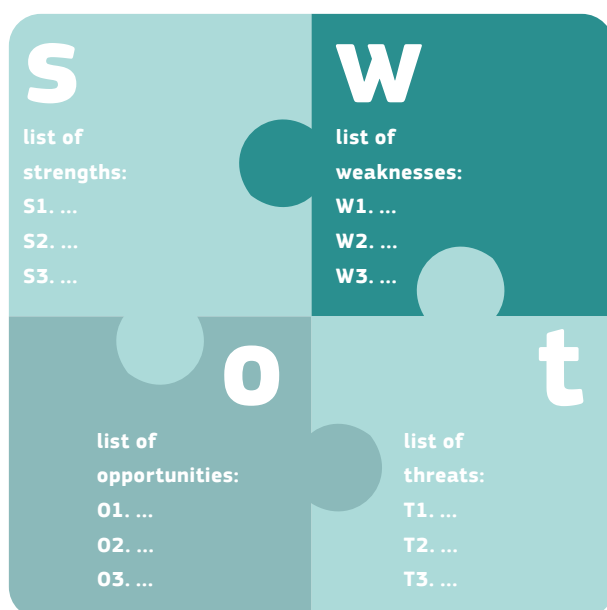
Good to know

What to look out for when conducting a SWOT analysis?

➲ Involve a wide range of people – it is important to find out what people think about the school, including everyone participating in the institution's life and its whole community.

➲ Do not focus only on the needs of individuals or only on the needs of the institution – collect information from a broad group, as this will also help you diagnose the most pressing needs.

Table 3. Example SWOT analysis

Strengths:

- intimate working atmosphere,
- high level of pupil safety,
- close/easy contact with pupils' parents,
- staff involvement,
- large/appealing school grounds (playing field, park),
- harmonious team of employees,
- openness and readiness of teachers to organise extracurricular activities (language club, theatre group, sports club, nature club, scout troop, volunteer club),
- pupils open to the proposed extracurricular activities.

Weaknesses:

- low standing of the institution in the county school community,
- the school does not benefit from grants,
- lack of foreign language teachers (except English),
- outdated equipment in classrooms (low number of computers, multimedia boards),
- architectural barriers,
- poor technical condition of the school building (need for renovation),
- insufficient parental involvement in the educational process,
- too many classes,
- low aspirations of pupils or the need to constantly motivate them to work,
- some teachers working in several institutions,
- lack of staff able to teach pupils with disabilities.

Opportunities:

- attractive natural setting of the school (forests, lake) – possibility to organise outdoor activities,
- well-developed tourism infrastructure (agro-tourism farms, campsite, holiday resort, stables),
- a famous athlete living in the municipality (Olympic champion involved in social affairs),
- events organised by the local government (harvest festivals, fairs, picnics, concerts at nearby historical sites),
- municipal authorities striving for the best possible situation for the school.

Threats:

- sporadic collaboration with partners who can support the work of the school,
- little opportunity for young people to benefit from activities other than those offered by the school (no community centre, sports centre, organisations working for children and young people),
- low level of school funding,
- decline in birth rate – falling number of pupils,
- bad commute for pupils from surrounding areas (infrequent public transport),
- the park next to the school is a meeting place for people who drink alcohol (safety risk for children and young people),
- insufficient cooperation with the psychological-pedagogical counselling centre (located in the county seat, 20 km from the town).

⚙ Exercise

- Think through your questions and prepare relevant (very simple!) survey questionnaires.
- For the survey, use examples for each of the four categories of the SWOT analysis – this will help you collect relevant responses.
- When asking for opinions about the school, ask your respondents to identify two or three strengths and weaknesses of the school and two or three opportunities and threats they think the institution is facing.
- Out of the responses to the survey, select the ones that were expressed most often in each group of respondents.

Empowerment – discovering the potential of the environment

By involving different stakeholder groups in the survey, you not only get to know their opinions about the school or the project concept you are starting to work on, but you also indirectly involve them in the development of your initiative in line with the principle of **empowerment**[4]. In the future, this may result in greater involvement of these people in the life of the school or in the various stages of the project, increased accountability and a willingness to be involved in the work of the team. The project staff will be able to count on the activity of many stakeholders, which will make the tasks much easier.

By getting to know different people's opinions about the school, you can find out what problems or needs they notice and what they expect from your plans. In the process, you can gather many valuable ideas for original activities that can be included in the project

Identifying problems, challenges, or needs is one of the most important tasks facing the author of an educational project. This is because all the other elements of the project will depend on the results of this analysis, which will also translate into the quality of the application, the creativity of the plans and activities, and ultimately the results of the project.

Erasmus+ projects can be real game-changers for the work of a school and even the lives of its pupils. If you start planning an initiative with this in mind, you will quickly realise that there is no room for mediocrity or shortcuts. With a multifaceted approach, you have the chance to create a much more valuable project, not just one that aims, for example, to provide pupils with the opportunity to improve their Maths marks or to organise a trip abroad for 10 teachers to attend a language course.

Carefully and ambitiously designed plans, tailored to the needs and capabilities of all participants can make a huge difference in their minds. For example, by developing their skills during a trip, a pupil from class 2b could later become a successful journalist, doctor or poet, while a pupil from class 1a – despite coming from a family supported by the local social welfare centre, where the parents do not care about their children's future – could complete their studies and open a successful accounting firm.

4.1.2. FROM PROBLEM TO OBJECTIVE – SUGGESTIONS FOR WORKING ON THE PROBLEM TREE AND THE OBJECTIVE TREE

W wielu podręcznikach na temat zarządzania projektami można spotkać następujące stwierdzenie: jeśli nie ma **problemu**, to nie ma też **potrzeby** realizacji projektu.

> **Remember**
> ⮑ The Erasmus+ project application form should outline the needs of the institution and substantiate them with objective data.
> ⮑ The needs must be based on the diagnosed problems faced by the institution.

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[4] See Blanchard, K. (2007). Przywództwo wyższego stopnia. Warsaw: PWN.

Selecting and analysing the problems to be addressed by a project is a key task for project planners. A few basic steps will help to organise the conclusions of previous analyses.

1

At the outset, it is worth establishing whether the identified problem really exists. Could it merely be the subjective opinion of the people who came up with the project idea? Or perhaps it is possible to measure its severity (e.g. by comparing it with the situation of similar institutions in the same region or in other countries)? Even if the situation is perceived as a problem subjectively, this does not mean that the plan to improve it is worth implementing. For example, if your school's average attendance is higher than that of the county or province, it is still worth implementing solutions that will lead to it being very high. Another example is learning outcomes. These are also worth improving among pupils with satisfactory or very good results, as the development of pupils' skills is the primary concern of schools. However, it is the actual situation that becomes the starting point for formulating objectives and results.

2

In the next step, consider the causes of the situation in question: why the problem exists. Here, too, it is useful to find data showing the specific symptoms and then consider the underlying causes. By analysing in this way the successive factors of the situation giving rise to the initial problem, you create a problem tree

Example

Suppose that the problem is unsatisfactory progress in English language learning among pupils in grades 4–8.

- Initial problem: insufficient progress of pupils in English language learning.
- Data demonstrating the existence of a problem: the average mark in grades 4–8 at your school is 3.3, while the average in the province is 3.9. In addition, an analysis of the results of the primary school final exams over the past five years showed that every year, an average of 94% of pupils in schools in your district pass the English language exam, compared to 85% in your school. Over the past five years, the average score for this exam has oscillated between 63% and 69% in the country, while in your school it has been between 60% and 65%.
- Finding such data is not a difficult task. Now you know that the quality of English language teaching requires intervention, and success will be achieved by improving the annual marks and bringing the end-of-school results closer to the provincial average: the average exam score should exceed 65% in the next years.

You must find out what lies at the root of the unfavourable situation in order to have a chance of finding the right solutions. It is certainly worth analysing the teaching methods at the school, the pupils' approach to learning and a number of other factors contributing to the problem. There may be a great many of them, so keep your eyes wide open and carry out a wide-ranging search – in order to select the most important ones that you will be able to remedy. See Figure 6 for some examples.

Figure 6. Example of a problem tree diagram:

Insufficient progress of pupils in grades 4–8 in English language learning

Insufficient teaching offer
- Low number of hours of extra English classes
  - Little interest from pupils
- High workload of the only English teacher
- Using only traditional teaching methods
  - Inadequate equipment in English language classrooms
  - Low motivation of teachers to improve their professional competences
    - Professional burnout
    - Few opportunities to exchange experiences with teachers from other schools
    - Situation on the labour market: teacher shortage, low salaries

School does not implement international activities in which pupils could participate
- Lack of financial resources to organise international cooperation
  - Poor skills of staff in obtaining external funding for projects
- Insufficient linguistic competence of staff
  - Little opportunity to participate in language courses
    - Teachers do not have information about programmes supporting the improvement of linguistic competences, trips, or general opportunities for international projects

Low motivation to learn foreign languages (many pupils believe they will not use English outside school)
- Low aspirations of pupils (they assume they will work on family farms or in low-level positions in local businesses where knowledge of foreign languages will not be required)
  - A low level of belief in the potential for growth
    - Negative family patterns
- Few pupils have the opportunity to travel abroad
- Pupils do not have acquaintances or friends abroad
- Excessive use of automatic content translation tools
- Insufficient parental support in learning
  - Pupils help their parents run family businesses or farms during the holidays
  - Poor financial condition of families

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The diagram shows that pupils' low progress in learning English is a consequence of three key phenomena:
- lack of motivation to learn,
- lack of cooperation with schools in other countries,
- inadequacy of teaching tools and methods.

These three most important causes of poor results stem from other problems that you have to deal with in order to get better teaching outcomes in the future.

Now you have to decide which problems you will include in your project.

Remember

- It is very important to adopt a balanced approach to the selection of problems. On the one hand, it should be ambitious, and on the other hand – realistic. For example, it is impossible to improve the equipment of the language classroom by planning an Erasmus+ project, so this cannot be the objective of your project. However, it is worth highlighting this issue in the application form.
- The project will certainly not be able to address all the problems identified (e.g. poor financial condition of families, pupils working during holidays, negative family patterns, shortage of English teachers).
- Although you cannot solve all the difficulties underlying the situation you want to change, being aware of them will allow you to select measures that are adequate to the needs and capabilities of the pupils, the school and its environment.

Exercise

- During the lesson, ask pupils to write on a piece of paper (without showing their classmates) three reasons why they are not getting the best possible results in one of their school subjects. Ask them to name this subject.
- Many answers will probably be similar – group them as follows:
  - reasons on the part of the school (including teachers),
  - reasons on the part of the recipients (pupils or their immediate environment);
  - external reasons.
- By analysing the answers, you will find that there can be many stakeholders in school improvement activities, that each of these groups needs to be addressed with tailored messages, and that people outside the school community can be involved in project activities.
- **Use this moment to quickly review the results of the stakeholder analysis and make any necessary adjustments to the project.**

A similar exercise can be carried out with other groups, e.g. teachers during a long break, parents of pupils during a parent-teacher meeting. You could also invite external specialists in English language teaching (e.g. from a private language school) to participate in the survey.

Make sure to ask the questions to the very party concerned – in this example, these would be pupils in grades 4-8. At the same time, you should take the opportunity to investigate each problem reported in more depth. In this way, you can gather information that will form the basis for future planning of the project's objectives, expected outcomes and key activities.

This will allow you to collect a lot of valuable data, such as:
- how many pupils believe that English is not useful outside school,
- how many pupils are affected by a lack of financial resources, as a result of which they stay at home during the holidays or cannot buy all the books they need,
- how much time do pupils spend practising their language skills on their own,
- what motivates pupils achieving better results to work.

The survey findings will allow you to better tailor the project to the participants' capabilities, expectations, and needs. For example, you can plan additional expenses in the project for special financial support for future mobility participants (this is covered by the "inclusion support" cost category described in the Erasmus+ Programme Guide).

A project is not a one-actor show – several or more people will certainly do a much better job of analysing the problems

Recommended working methods and exercises with the problem tree for the teaching team

World Café

In the initial phase of identifying the most important problems, the World Café method will work well. It consists in dividing the group invited for discussion into several smaller groups, which discuss different aspects of a given problem. The groups sit down at separate tables to find answers to the questions posed, under the guidance of a table master (moderator). After several minutes, all participants (with the exception of the moderator) move to another table to present the findings of the completed reflection on a particular aspect to the others. The moderator discusses the progress of the group that previously sat at this table, after which the participants try to develop or elaborate on the findings of their predecessors.

The workshop concludes with a session summarising the work of all the tables and reaching final conclusions together.

Good to know

A brief and interesting description of a workshop conducted using the World Café method is provided in the booklet Café to Go: A Quick Reference Guide for Hosting World Café [QR].

Hosting World Café

E+
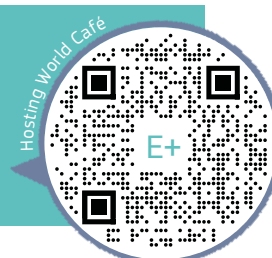
Problem tree

The method that works best is writing the individual problems on separate pieces of paper and grouping them in such a way that a hierarchy of the problem areas is visible.

Place the pieces of paper with the main problem at the very top, and underneath it place the pieces that contain the situations that caused the main problem. This will allow you to reposition the pieces of paper when the participants find that the relationships between the individual aspects are different than originally assumed.

The position of the individual pieces of paper, laid on a table or stuck to a wall, can be changed at any time. You can also use a whiteboard or flipchart to write down individual keywords for the exercise. However, with these tools, it is not possible to swap the position of each keyword as flexibly and easily.

Once the participants agree that the challenges to be addressed by the project have been arranged in a true cause-and-effect order, you can end the exercise.

Exercise

Look at the problem tree on – discuss it with a few people and, based on your experiences, list at least two additional reasons for pupils' underperformance.

Once you have finished the exercise, it is a good idea to take a longer break so that you have time to reflect on what you have worked out, to recall the specific events and people addressed by the ideas as well as the associations captured in the problem tree.

You may find it worthwhile to consult with a wider or different group.

In the next step, you need to select problems that can be solved or mitigated by implementing the planned initiative.

Note

The selection of problems should be made in accordance with the funding rules and objectives of the chosen programme or grant fund, therefore it is necessary to read the detailed information on this subject. For Erasmus+, the primary manual is the Erasmus+ Programme Guide.

You already know which problems you want to include in your project. The time has then come to envisage the situation you want to find when it is completed. This is the first attempt to define the project objectives. More often than not, the objective is the opposite of the problem situation, e.g:

Poor learning results	➔ Good learning results
Low parental involvement in the teaching process	➔ High parental involvement in the teaching process
Insufficient number of hours of extra English classes	➔ Sufficient number of hours of extra English classes
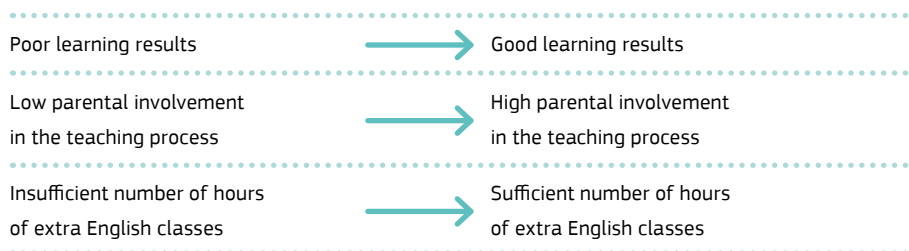
Referring back to the results of the problem analysis, you can decide what level of achievement of a particular objective you would consider a success (knowing the circumstances, the specific nature of your school, locality,

or stakeholders). Therefore, no one can plan a project better than the teachers, as they know the pupils and their relations at school (as well as at home or among colleagues), are aware of their own shortcomings, and understand the numerous factors that affect the institution or can have a great impact on the course and final outcomes of the project work.
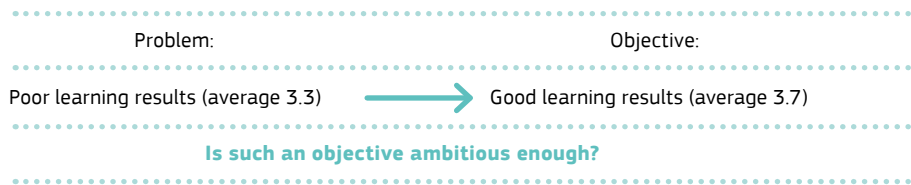
Problem:	Objective:
Poor learning results (average 3.3) ⟶	Good learning results (average 3.7)
Is such an objective ambitious enough?	

For example, in one school, raising the average English mark by 0.4 would be a major success. But for another, such progress will be insignificant and not very ambitious, because the municipality or city mayor has just issued a tender for the purchase of modern multimedia equipment for language learning, which will make it possible to introduce a new, very effective teaching method.

The selected problems should be transformed into objectives, maintaining the structure of the problem tree

For each school, teacher or pupil, specific project achievements will be of different value. This is why the analysis of stakeholders and problems is so important. If the authors of the project do not know the real situation of the school for which they are preparing the project, even if they are experts in project management, they will not be able to include in the plan all the relevant factors and the real conditions in which the institution will work when implementing the initiative schedule.

Important
➲ Before you move on to setting objectives, gather the most important information on the problems you have selected for further work. This will help you correctly determine the project indicators and prepare a high-quality grant application.
➲ Provide concrete and objective data to support the selected problems (similar to p. 41).

Table 4 presents some arguments describing selected problem situations.

Please note that the information in the left-hand column may be regarded only as the subjective opinions of the project authors. However, the results of the analysis cited in the right-hand column are objective data that lend credence to each of these theses, and often make it easier to find appropriate solutions.

Being aware that parents of pupils in grades 4–8 do not place a high value on their children's education, you can plan activities in your project that will enable these parents to better understand the importance of education and the opportunities it provides. In this way, some pupils can gain allies and supporters for their school struggles in their parents. If family ties can be strengthened in the process, this will add considerable value to the project.

Perhaps in the future, parents will become involved in organising a school language picnic or will offer to ask a nearby factory to sponsor language teaching aids for the school.

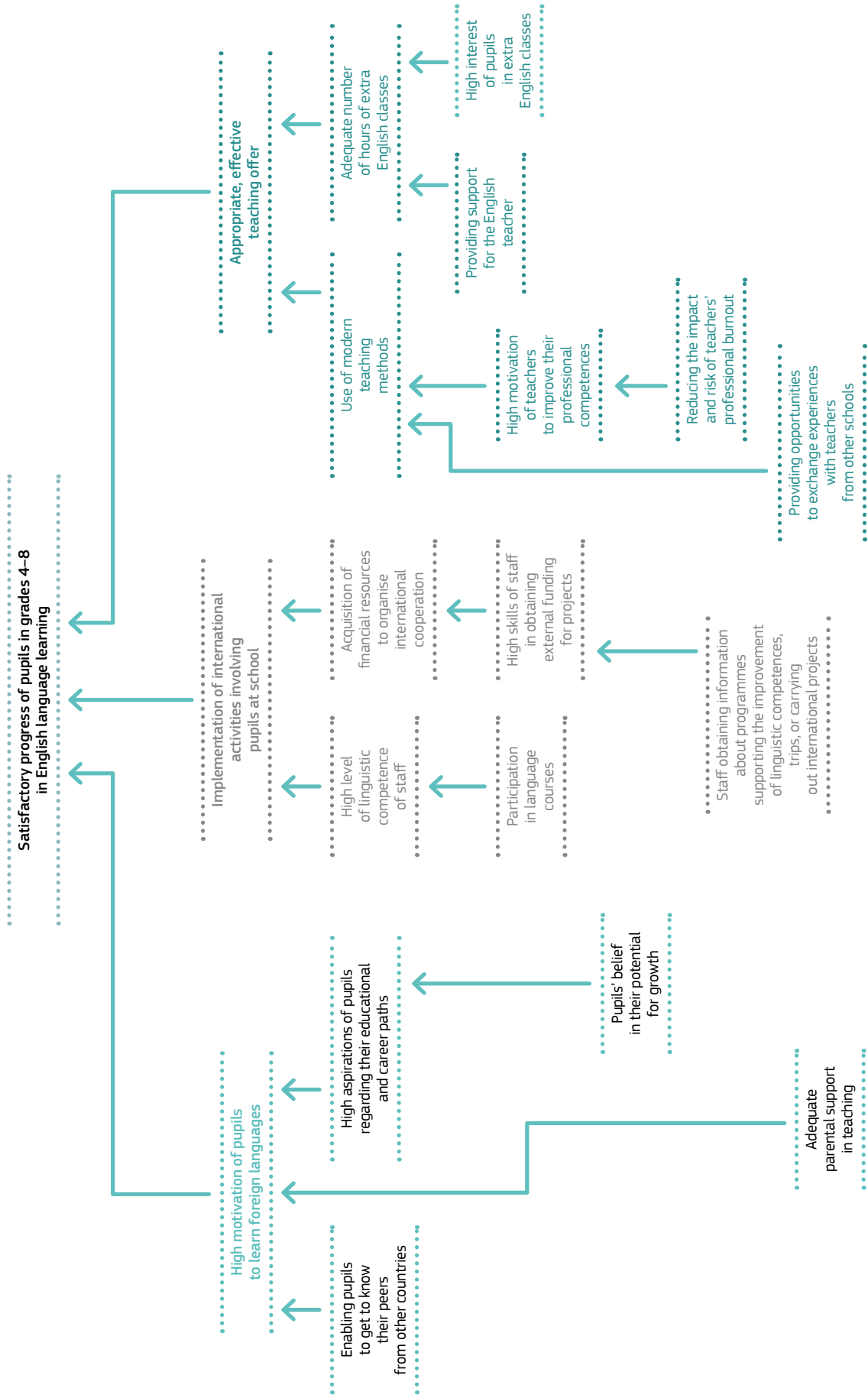**Table 4. Selected problem situations and examples of their justification**

Problem selected	Example justification
Low interest of pupils in extra English classes	Of the male and female pupils in grades 4–8, only 30% report a willingness to participate (on top of that, these are the pupils obtaining the best marks). Some of the reasons cited by pupils for their lack of interest include: ➲ lack of time – 60% of pupils, ➲ too many household chores – 72%, ➲ focus on other subjects (more important to them) – 43%, ➲ ability to develop language skills independently – 46%, ➲ unlikeable teacher – 20%, ➲ too much emphasis on grammar and not enough emphasis on conversational skills – 60%, ➲ unattractive classes – 67%. **The above data was collected in January 2021. An anonymous questionnaire was completed by 90% of pupils in grades 4–8.**
Insufficient linguistic competence of staff	Among the 50 staff members at the school, only one person speaks English at C2 level (the English language teacher). The skills of the others are as follows: ➲ 30 people at A1 level, ➲ 14 people at A2 level, ➲ 9 people at B1 level, ➲ 6 people do not speak English. Additionally, teachers indicate a lack of exposure to English (64% of staff), and 70% of staff members report a significant barrier or fear of using the language. **The analysis was conducted during a teaching staff meeting on ...**
Negative family patterns	Many pupils at the school come from families of farmers (around 50%). In these families, only 60% of the parents have a secondary education (of which 50% have a secondary technical education). The parents are not aware of the impact of working time spent on studying on the future of young people (**based on interviews conducted last year**). Nearly 20% of the pupils' families are supported by the municipality's social welfare centre – these are poor families at risk of inheriting poverty..

Objective tree

By transforming the selected problems into objectives – while maintaining the structure of the problem tree – you will obtain an objective tree. It illustrates the state you want to achieve with your project. In the tree diagram, you can see the interdependencies between the different aspects more clearly. For example, a high level of pupil interest in participating in extra English classes will make it possible to launch an adequate number of hours of these classes – this will be an important element of an appropriate, effective or rich teaching offer which, in turn, will make it possible to achieve the main objective of clear progress of grade 4–8 pupils in learning the foreign language.

The objectives should be formulated in a way that shows the change from the initial situation (see project definition on p. 27).

Figure 7. Example of an objective tree diagram

Satisfactory progress of pupils in grades 4–8 in English language learning

Appropriate, effective teaching offer

- Adequate number of hours of extra English classes
  - High interest of pupils in extra English classes
- Providing support for the English teacher
- Use of modern teaching methods
  - High motivation of teachers to improve their professional competences
    - Reducing the impact and risk of teachers' professional burnout
    - Providing opportunities to exchange experiences with teachers from other schools

Implementation of international activities involving pupils at school

- Acquisition of financial resources to organise international cooperation
- High skills of staff in obtaining external funding for projects
  - Staff obtaining information about programmes supporting the improvement of linguistic competences, trips, or carrying out international projects
- High level of linguistic competence of staff
- Participation in language courses

High motivation of pupils to learn foreign languages

- High aspirations of pupils regarding their educational and career paths
  - Pupils' belief in their potential for growth
- Enabling pupils to get to know their peers from other countries
- Adequate parental support in teaching

Objectives can be drafted in many ways. The important thing is that they express the intentions of the project precisely. The objectives should also be coherent with the presented problems, described by objective indicators, and should show the expected change

Table 5. Changes to be expected as a result of the project*

Expected situation	Change you want to achieve through initiative implementation
High motivation of pupils to learn foreign languages	⮑ Increasing the pupils' motivation to learn foreign languages.
Implementation of international activities involving pupils at school	⮑ Expanding the school's activities to include international activities involving pupils or ⮑ Enabling pupils to participate in international activities.
Appropriate, effective teaching offer	⮑ Complementing or expanding the teaching offer with new, effective methods and tools for English language learning. or ⮑ Making the teaching offer for English language learning more attractive by introducing modern teaching methods and tools that increase the effectiveness/quality of teaching.

* The examples given do not constitute properly formulated objectives yet – they only provide general information about the initiative's focus.

4.1.3. STAKEHOLDER ANALYSIS AND PROJECT PARTNER SEARCH

Stakeholder analysis is used to identify the people or groups that will have an impact on the project and to rank them according to their importance to the initiative or coordinating school.

The main outcome of the stakeholder analysis is a precise assessment of the following:
⮑ Whose and what benefits (or losses) should be taken into account when implementing the activities?
⮑ Who can help you and who can hinder your plan?
⮑ To what extent can particular people or institutions influence your project?;
⮑ What should the strategy of activities and communication with the different stakeholders look like?

The following tools can facilitate stakeholder identification:
⮑ brainstorming,
⮑ meetings, discussions with representatives of various groups connected with the school environment,
⮑ analysis of the local press,
⮑ registers of organisations,
⮑ experience and knowledge of local or sector-specific relations.

Once you know the concerns and expectations of the various parties towards your initiative, you can move on to planning activities that will enable you to attract allies or limit the influence of groups that may have a negative impact on the project.

Selecting international partners is also an important part of stakeholder identification. Which school or course organiser you choose will have a direct impact on the quality of the mobility, and therefore on the quality of the objectives and final outcomes.

Good to know

➲ The above-mentioned **European School Education Platform**[QR] will prove helpful in the search for partners. It is a meeting place for schools and teachers interested in organising or taking part in mobility through teaching, job shadowing, or internships. Entities offering such opportunities, or those seeking them, can post advertisements and cooperation invitations on the platform.

➲ School governing bodies often cooperate with foreign partner cities or regions. It is worth trying to use these channels to find project partners.

➲ A tool worth exploring is **the interactive map of projects**[QR] implemented under Key Action 1 of the Erasmus+ School Education field. Perhaps a school in your area already has experience in implementing a project and will be willing to share good practices in finding partners, organising courses or other activities related to project implementation.
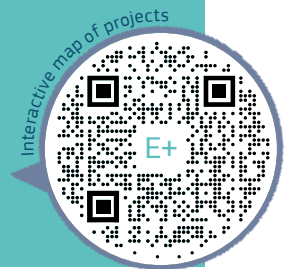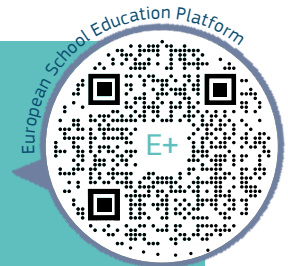
4.2. FORMULATING OBJECTIVES ACCORDING TO THE SMART MODEL

Imprecise objectives are more difficult to achieve. If you do not visualise exactly what you are aiming for, it will be difficult to keep track of whether you are moving in the right direction, or to spot impediments as they arise and keep your motivation to act strong. If the objectives do not clearly define the expected situation, it will also be impossible to accurately assess the impact of your actions, both during their implementation and after completion.

Therefore, a very important next step will be to formulate your objectives according to **the SMART principle**. This will allow interested parties to properly understand the planned activities and their expected impact on immediate and distant stakeholders.

According to sources, the SMART concept was developed in the 1980s for a US industrial company. Because of its aptness, it is still successfully used today in many areas, including business, education, administration and personal development. An undeniable advantage of the approach is its effectiveness and simplicity.

The name of the SMART model is derived from the following words:

➲ **Specific** – the objective must clearly indicate who or what it concerns;

➲ **Measurable** – the objective should be easy to measure (you need to be able to assess the extent to which it has been achieved);

➲ **Achievable/Attractive** – the objective must be challenging and its achievement should be a real success, a significant step forward and a solution to important problems;

➲ **R**ealistic – the objective must not be impossible or too difficult to achieve (a lack of faith in success will sharply reduce motivation to act and thus reduce the chances of achieving the desired change);

➲ **T**imed – the objective must be time-bound (the parties involved in the initiative need to know when the objective will be achieved – this will mobilise everyone involved, allow effective activities to be planned and reduce the risk of postponing them).

Table 6. SMART method

S *specific* — Specific/Concrete	Who is the specific target of this goal? (e.g. 20 students from grades 4–8 of school no. X, achieving semester grades of 2–3, including 5 ndividuals in a difficult financial situation)
m *measurable* — Measurable	What indicators will allow you to determine that the goal has been achieved and the implemented actions were: ➲ appropriate, ➲ successful, ➲ effective?
a *achievable/attractive* — Achievable/Attractive	Do you have sufficient resources and are you willing to commit or use them to achieve the objective?
r *realistic* — Realistic	Will it be possible to achieve the objective through the planned activities?
t *timed* — Timed	When do you intend to achieve the objective?

Good to know

➲ Sometimes formulating a SMART objective can be tricky in terms of grammar, as including a lot of information in one sentence can result in unnatural wording or a lack of linguistic correctness.

➲ Here again, working in a group will prove far more effective than a single author's effort. If five people draft the chosen objective individually, it will be possible to select or refine the most appropriate wording on the basis of the drafts created.

Remember

In this case, capturing all the required information in accordance with the SMART approach is far more important than the way the objective is worded.

In the application forms of the Erasmus+ School Education field, you can provide the necessary information about the desired changes, making appropriate use of the character limit in the fields concerning the project objectives.

Figure 8. Extract from the application form for a short-term project (KA 122 SCH)

Erasmus+

Call 2025 Round 1 KA1
KA122-SCH - Short-term projects for mobility of learners and staff in school education (KA122-SCH)
Form ID KA122-SCH-643543BE Deadline (Brussels Time) 19 Feb 2025 12:00:00

Project objectives

What are the most important needs and challenges your organisation is currently facing? How can an Erasmus+ mobility project help improve your organisation for the benefit of all of its learners? Please illustrate your answers with concrete examples.

Please define the objectives your organisation wants to achieve by implementing this Key Action 1 mobility project.
Your objectives should be concrete, realistic, and should represent a real benefit for your organisation and its learners.

List of objectives
Number of objectives : 1

Objective 1
Title
What do you want to achieve?

200 characters

Explanation
Which needs and challenges described in the previous question are addressed by this objective, and how?

1000 characters

Measuring success
How are you going to evaluate if the objective has been reached?

1000 characters

The project grant application form allows you to present the most important information in more detail. The applicant has 1,000 characters to use in the fields "Explanation" and "Measuring success", which is sufficient to detail the main objectives of the project. These fields allow you to elaborate on the description of the school's needs or the key data on the basis of which these needs were identified and formulated.

Example

- **Project objective (main):** To increase the effectiveness of English language teaching among male and female pupils in grades 4–8 (8 classes in total – 200 pupils) at Primary School No. … in Zakopane in the period June 2023 – November 2025 (assessment based on the results of primary school final exams in June 2025 – the expected average score is 89%.

- **Or:** To increase the average of semester marks in English language among male and female pupils in grades 4–8 (8 classes in total – 200 pupils) at Primary School No. … in Zakopane, to an average score of 3.9, in the period June 2023 – June 2025 (assessment based on marks given at half-term and the end of the 2024/2025 school year).

- **Objective 1 (specific):** To increase motivation to learn English language among 120 pupils (including 90 who received at most a satisfactory mark, i.e. 3.0, in the last school year).

- **Objective 2 (specific):** To expand the school's activities to include international activities (youth exchanges, eTwinning projects) involving at least 100 pupils aged 12–17 years*, in the period January 2024 – June 2025).

- **Objective 3 (specific):** To make the school's offer for pupils more attractive by implementing two modern teaching methods (CLIL and storytelling), by the end of the 2024/2025 school year.

- **Objective 4** (specific): To ensure full access to the school's offer for 14 male and 10 female pupils with fewer opportunities due to difficult financial situation and 2 pupils with disabilities.

 * Even if there are currently no pupils older than 15 in the primary school, it is possible that in subsequent years such individuals will be found in the pupil community. Older male or female pupils should not be excluded from the project, as they are likely to be the ones most in need of support. If you decide to use wording that may be unclear at first glance (e.g. primary school pupils aged 17), then it is a good idea to remove any doubts in the explanation of the objective.

** The fourth specific objective stems from the analysis of the pupils' situation carried out at the needs identification stage. The situation of such pupils has to be taken into account in the project (sometimes at the level of objectives and sometimes at the level of planned activities – starting from the first information and recruitment activities).

The inclusion of people with fewer opportunities is one of the objectives of Key Action 1 and horizontal priorities of Erasmus+ (see pp. 11–12). Therefore, it must be taken into account at every stage of project planning: from the first ideas, to the analysis of stakeholders, problems, objectives, planning of activities and the achievement of results.

Erasmus+ horizontal priorities and Key Action 1 objectives

Every grant programme is subject to an effectiveness analysis. Therefore, when starting to work on your project, familiarise yourself with the structure of the programme – its objectives, applicable procedures, documentation.

Remember that while the objectives of your project are the most important for your school, the objectives of the programme you intend to use are important for the European community as a whole.

On target!

Each objective can be achieved in many ways. It is important that the activities planned in the project provide the greatest possible benefit to both the main target group (pupils, school staff) and the environment. However, this does not mean that unfamiliar methods – those that do not guarantee success – should be avoided. They are also a source of innovation. Therefore, the best solution may be to find the middle ground between tried and tested solutions and completely new ones.

Exercise

➲ Choose one of the objectives shown on pages 52 and 53 and then ask three people to independently suggest three actions each to achieve it.

➲ Remember that these will be intuitive suggestions, especially if the people invited to participate in the exercise do not know the results of the needs analysis carried out. However, you will discover a number of new and different activities that will be relevant to your objective and can be incorporated into further project work.

Exercise

➲ Search the Erasmus+ Project Results Platform for three projects carried out by schools with a profile similar to yours. It will certainly be an inspiring read ☺.

➲ Then have a look at the list of possible activities under Key Action 1 of the School Education field in the Erasmus+ Programme Guide and compare the correspondence between the activities presented by the implementers of the selected projects and the list in the Guide.

4.3. PLANNING

This is one of the most important stages in project development and – according to many practitioners – the most crucial for the management of the entire project.

Planning involves several main tasks: establishing the main goal, specific objectives, target groups, benefits for them, as well as basic organisational aspects, tasks, or their outcomes. **Initial evaluation (ex-ante)** is of great importance at this stage, as it will allow you to eliminate some project risks and enable, among other things:

➲ logistical and operational discernment (do you have the logistical facilities, human resources, and premises necessary to carry out the project),

➲ examining whether there are people interested in the project and whether they will actively participate in it,

➲ diagnosis of the individual needs of staff, pupils and other stakeholders,

➲ assessment of risks and planning of activities that will reduce or eliminate them.
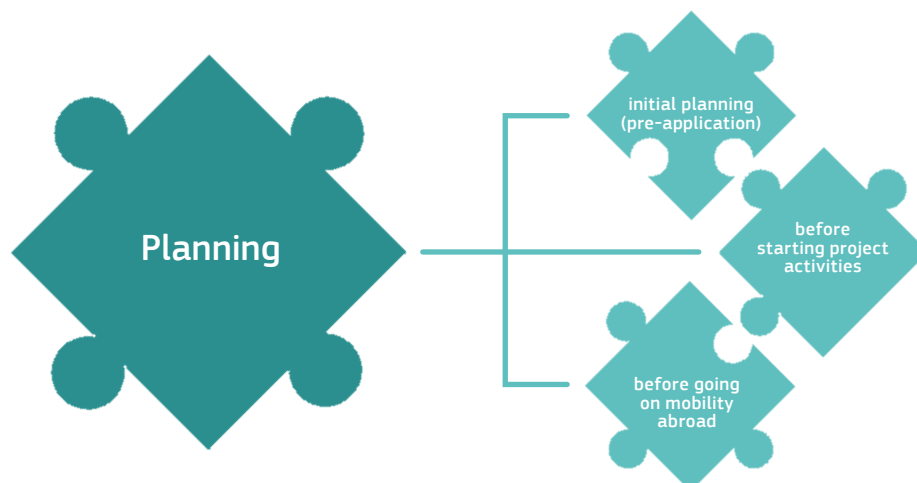
Remember
The initial evaluation will allow you to review the project plan and see what might not align with your expectations. To minimise the risk of the initiative failing, look at all the elements: the team, the tasks, the assumptions, and diagnose the main risk factors.

Risks are always present and can arise from practically any factor: unattainable objectives, ill-planned monitoring of participants and project activities, lack of competence, insufficient commitment of the team, as well as a lack of understanding of the project's assumptions, lack of fluidity, lack of financial control, or the accumulation of errors or problems (read more about this in Chapter 5).
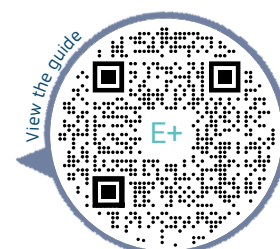
Remember
Planning in the greatest detail brings nothing but benefits – it will be your point of reference during the implementation of the project. It will be easier for you to spot every deviation and every change and then analyse them, to assess the risks of project failure, not achieving the objectives or not meeting the needs.

Planning
- initial planning (pre-application)
- before starting project activities
- before going on mobility abroad

What is **initial planning?**

- Getting to know the objectives and priorities of the Erasmus+ programme;
- Reviewing the entities eligible to apply;
- Analysing the formal and technical aspects of the application: setting up a profile in the European Commission Authentication System – obtaining the EU login, registering the institution in the Organisation Registration System – obtaining an OID^[QR] number;
- Setting individual objectives for participants;
- Setting objectives for the applicant institution;
- Comparing the institution's development plan (Erasmus+ Plan) with the above-mentioned Erasmus+ objectives and priorities;
- Preparing a project description or summary;
- Checking the staffing and personal capacity (making sure that enough staff or pupils will be willing to go on the trip and that the implementation of the project activities will not disrupt the day-to-day work of the school), as well as the logistical, operational and space capacities of the applicant institution;
- Cooperation with the governing body – its staff should be be made aware of the project idea well in advance, so that the body's representative can sign the grant application or give the appropriate power of attorney^[QR] to another person to do so without hesitation. In addition, the governing body should secure in its interim budget 20% of the value of the grant, which the institution will receive from the National Agency only after the project has been settled;
- Co-operation with parents – especially when planning pupil mobility,
- parents or legal guardians should know that the school intends to carry out such a project. This will make it easier to estimate the number of participants and then obtain approvals for pupil mobility. This is an important step, especially in the case of long-term mobility, in which the parent plays a much greater role^[QR];
- Listing the expected results;
- Selecting the theme of the courses and training, areas for job shadowing of school staff, determining the course of pupils' trips and other planned mobility activities.

How to apply — E+

Power of attorney template — E+
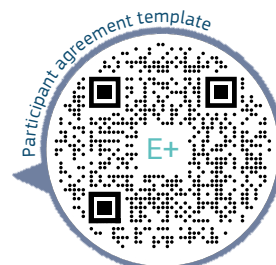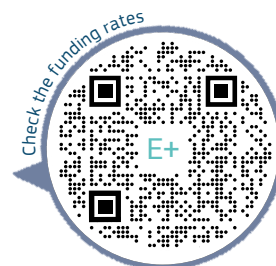
View the guide — E+
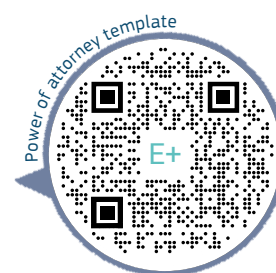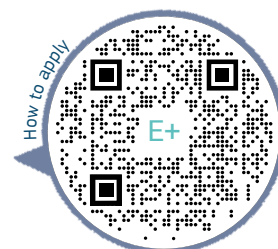
Remember
Right at the start of the planning stage, you need to familiarise yourself with the formal requirements and horizontal priorities of the Erasmus+ programme, and then verify whether your idea is in line with the priorities of the School Education field(pp. 11–12).

What to consider when **planning project activities**?

- Developing a schedule of activities that includes milestones (see pp. 59–60), i.e. activities that conclude a particular stage, and without which further work would not be possible;
- Selecting project team members and dividing the responsibilities;
- Preparing a schedule for project team meetings;
- Creating regulations for the recruitment of participants;
- Carrying out recruitment (if it has not already taken place at the application stage);
- Selecting hosting institutions;
- For accreditation-based projects (KA 121 SCH), an important step is to plan the budget for the project and individual activities while taking into account the applicable funding rates[QR];
- Agreeing on the project settlement rules with the governing body;
- Reviewing the formalities for signing the agreement with the National Agency (incl. establishing the bank account number to which the grant will be transferred[5]).
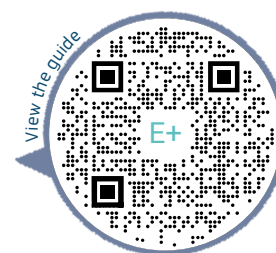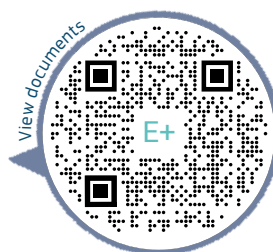
How to prepare for **organising mobility**?

- Preparation of participants for the trips (theme, programme, form);
- Conclusion of agreements with the mobility participants[QR] (choice of funding method, preparation of individual agreements for each participant and their signing by the legal representative of the institution[6] along with the school staff members who will travel with the pupils, and parents or guardians of the pupils);
- Preparation of a mobility programme or thematic scope: please refer to the additional template documents for mobilities such as job shadowing, teaching assignments, individual pupil mobility and long-term pupil mobility, inviting experts and teachers for internship, and group pupil mobility[QR].
- Becoming familiar with the requirements for pupil mobility e.g. participants in long-term mobility[QR] must complete an introductory training organised by the National Agency before departure);
- Selection and training of supervisors of pupils taking part in the educational trip;
- Cooperation with the hosting institutions;
- Outlining to the participants your expectations regarding their trip;
- Monitoring of the stay (establishing the form and frequency of contact or reporting);
- Taking measures to maintain safety, e.g. taking out optimal insurance for the participants,
- Logistics of the trip, e.g. purchase of tickets, accommodation, carrying out the preparatory visit.

Planning before starting the project

Check the funding rates — E+

Participant agreement template — E+

Planning before the educational trip

View documents — E+

View the guide — E+

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[5] The governing body must indicate the bank account number. It should be provided in the "Details for the Financial Agreement" questionnaire and in the "Bank Account Information" form.

[6] A person who, by virtue of their function or power of attorney, can represent the interests of the governing body in matters related to the Erasmus+ programme or the project in question. This will normally be the head of the governing body or a person designated by them, e.g. the head of the applicant institution.

➲ Planning should also include post-mobility activities, e.g. implementation of changes based on the knowledge gained during the trip, as well as evaluation and dissemination activities.

➲ The implementation of such activities has the greatest impact on the effectiveness of the project, so it is worth formulating them in such a way that they are concrete and valuable to the wider community.

4.3.1. GANTT CHART – HOW TO EFFICIENTLY BREAK DOWN A PROJECT INTO INDIVIDUAL TASKS AND SCHEDULE THEM

Imprecise division of tasks contributes to delays, mistakes, poor communication and conflicts, which significantly increases the risk of project failure. It is therefore worth considering which activities guarantee the achievement of the project objectives and which are not mandatory, but will bring significant benefits. It will also be useful to select the right person among those involved in the project to carry out specific activities. Depending on the organisational structure of the project, tasks can be assigned to individual members of the project team or to dedicated task teams within it (e.g. promotion and communication team, administration team, evaluation team).

An invaluable tool to support project management is the Gantt chart. It is a graphical plan of the project, showing the division of tasks, the intensity of activities and their progression over time. It is a good idea to place the chart in a place frequently visited by all team members. The more detailed it is, the easier it is to constantly monitor the progress of activities.

There are programmes available on the market (also under an open licence) that allow you to create these types of charts. Simply type "Gantt chart" into the search engine to learn more. Below, we show examples of how a Gantt chart can be used to develop a project schedule broken down into activities and completion dates (Figure 9) or a single activity broken down in more detail (Figure 10).

Pay attention to the fields marked with an asterisk – ✪ these are milestones, i.e. important moments of completion of a particular stage or key activity, which if not met, increase the risk of the project not succeeding. For example, the schedule of activity (Figure 10) shows that failure to send invitations to parents in time will make further activities unjustified – in this case, the low attendance at the picnic calls into question the legitimacy of its organisation.

Sometimes during the course of a project it is necessary to adjust the action plan and update the chart.

Figure 9. Project schedule

Project implementation period: July 2023 – December 2024.

Activities	Responsible persons	Quarters					
		1	2	3	4	5	6
Motivation survey	Robert	✓					✓
Language competitions	Joanna Katarzyna		✓				✓
Language picnic	Joanna Katarzyna				✓		
Coaching	Robert Expert		✓	✓	✓		✓
Workshops for parents	Mariusz Ewa + ???		✓			✓	
Language course trip	Jarosław Mariusz		✓	★			
Pupil mobility	Jarosław Mariusz			✓	★		
Job shadowing trip	Jarosław Mariusz				✓	★	
Evaluation	Grażyna Andrzej	✓	✓	✓	✓	✓	★
Reporting	Norbert	✓	✓	✓	✓	✓	✓
Information and promotion	Julia pupils	✓	✓	✓	✓	✓	✓

Figure 10. Activity schedule – language picnic

Language picnic: 22 May 2024.

Tasks	Weeks									
	1	2	3	4	5	6	7	8	9	10
First team meeting (discussion of tasks)	■									
Planning of the programme/event		■								
Establishment of a pupil task force (assignment of tasks)		■								
Posting of information on the school website and social media			■							
Inviting speakers and entertainers			★							
Printing flyers				■						
Distribution of flyers and emails to schools, kindergartens and NGOs (coverage: county)				■	■					
Mailing of invitations to parents						★				
Arranging space at a science park			■							
Arranging refreshments for all guests			■							
Ordering awards and diplomas				■						
Booking a venue at the community centre (theatre performance)		■								
Arranging games and activities (puzzles, quizzes, competitions)		■	■		■		■			
PICNIC								★		
Return of rented equipment, cleaning up									■	
Publication of a photo report of the event (school or municipal website, local press)									■	
Mailing a thank-you note (with an invitation to view the photo report)										■
Follow-up meeting (thanking the team)										■

60

4.3.2. ACTIVITIES UNDER THE MOBILITY PROJECT

The catalogue of activities under Key Action 1 in the School Education field[7] enables the planning of a variety of activities. Even in the case of a large school, where several or even a dozen participant groups can be formed and multiple mobilities can be implemented, it is impossible to take advantage of all opportunities within a single short-term project. Therefore, when developing the Erasmus+ Plan, it is important to consider its implementation through:

➲ Short-term projects (KA 122 SCH) – **lasting up to 18 months**

➲ Projects implemented under Erasmus accreditation (KA 121 SCH) – **a package of projects lasting 15 months, with the possibility of extension after a year to 24 months, carried out within the duration of the Erasmus+ Plan**.

Due to the longer duration of activities covered by accreditation, their planning should be approached more strategically than short-term projects, which serve as targeted interventions responding to specific, well-identified needs.

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[7] The mobility types are presented in Chapter 1. For detailed information please refer to the Erasmus+ Programme Guide.

List of possible activities

Table 7 outlines possible activities that the school can plan to achieve the specific objectives.

Table 7. Examples of activities leading to the achievement of specific objectives

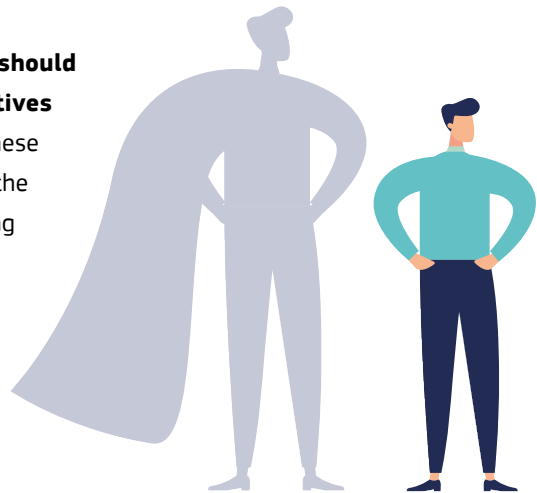| Specific objective	Possible activities
Increasing motivation to learn English among 120 learners (including 90 learners who obtained at most a satisfactory grade in the last school year).	⮑ Detailed survey of male and female pupils' motivation; ⮑ Announcing competitions based on the use of content from English-language publications; ⮑ Organising an annual language picnic with the whole ⮑ school community (including parents); ⮑ Providing individual coaching to pupils; ⮑ Conducting workshops for parents; ⮑ Inviting guests from other countries (artists, athletes, representatives of the business sector).
Development of school activities with an international focus (Youth exchanges, eTwinning projects) involving at least 100 pupils aged 12–17 between January 2024 and June 2025	⮑ Implementation of two eTwinning projects in partnership with schools from two different countries; ⮑ Implementation of two group mobility projects (2 groups of 15 pupils); ⮑ Formation of school project teams (teachers and pupils) participating in training sessions and workshops led by external experts. The culmination of these teams' efforts will be the planning of at least one initiative focused on international youth exchange and one staff mobility project.
Enrichment of the offer to pupils by implementing two modern teaching methods (CLIL and storytelling) by the end of the 2024/2025 school year.	⮑ Participation of 15 teachers in foreign language courses; ⮑ Participation of 15 teachers in methodological courses on innovative CLIL and storytelling methods; ⮑ Trip of 5 teachers for job shadowing at foreign schools where the above-mentioned teaching methods are used.
Ensuring that pupils in need of support in grades 4-8 have full access to the school offer during the project period (10 male and 18 female pupils who are in a difficult financial situation as well as 2 pupils with disabilities).	⮑ Appointment of a school social inclusion coordinator; ⮑ Trip of this coordinator to a partner school to observe solutions that foster the inclusion of pupils in need of educational support; ⮑ Monitoring of the family situation of pupils from families benefiting from the support of the social welfare centre, including meetings with social workers working with pupils' families (at least twice a year); ⮑ Supervision of the inclusion of pupils requiring support in school activities (analysis of the criteria for participation in activities in terms of the needs of those with fewer opportunities); ⮑ Additional pedagogical or psychological support; ⮑ Organisation of a school integration day.

Now, each activity must take the form of an operational plan, including deadlines, information on expected results, persons responsible, frequency or intensity (e.g. one language picnic at the beginning of the school year and one in the spring).

The operational plan should include details of the progress of each task carried out under each activity at each stage of the project.

During the planning process, constant reference should be made to the objectives of the project and the objectives and priorities of the Erasmus+ programme. Taking these into account at each stage of the activity demonstrates the value of your project. When designing tasks aimed at achieving specific objectives, it is also worth setting additional goals. For example, the use of digital technologies (e.g. online quizzes) could be included in the family language picnic programme. In such scenario, pupils can take on the role of team leaders for their family groups competing against each other. If you introduce a rule that it is the parents who have to hold the phone during playtime – it is likely that, at least for some of them, working with a mobile phone during a meeting and participating in such activity will be a new experience. In this way, your project will actively support the policy of developing digital competences in society.

Exercise

➲ Combine the activities in the table on p. 62 for the first specific objective with the priorities of the Erasmus+ programme (pp. 11–12). Draw up a short (maximum four-sentence) activity proposal for each priority.
➲ Example: organising a competition for the most interesting song in English that encourages people to care for the environment, separate waste or learn about other cultures.
Group size: 3 to 5 people. Prize: participation in an educational trip to a partner school in Sweden. Extra points will be awarded to groups with pupils with poor results in English.

Mobility is the most important task in projects under Erasmus+ Key Action 1, but all other work determines the course of those trips, their impact and influence on the further work of the school. This is why activities related to the preparation of the participants for the trip and those following their return are very important.

Remember

⮑ The aim of a project under Key Action 1 of the School Education field is not so much the mobility of a certain number of staff or pupils to attend a course abroad or to participate in classes with their peers in a partner school, but the valuable, significant change in life, work, learning, and relationships that will take place in the institution's community after the return of the mobility participants.

⮑ The value of a Key Action 1 project is judged by its impact: the more the project has contributed to improving the quality of the institution's work in the areas identified as challenges or problems, the greater the value.

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PROJECT MANAGEMENT IN PRACTICE
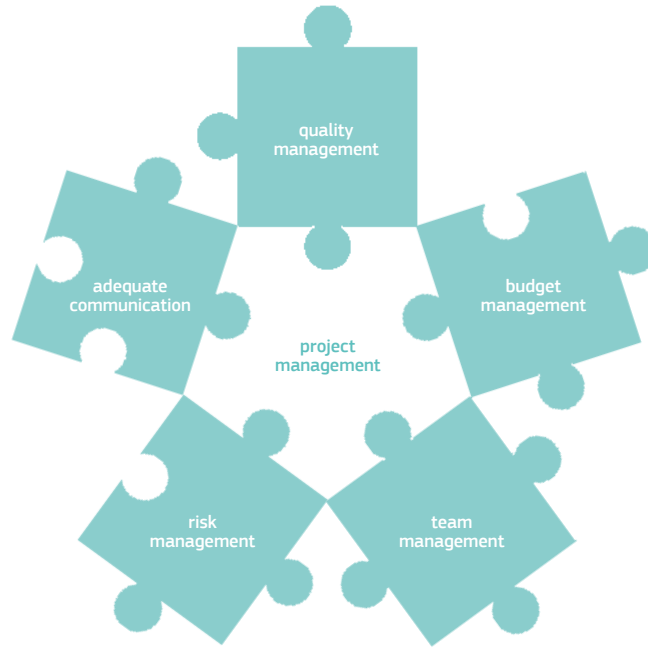
5.1. PROJECT TEAM BUILDING, DIVISION OF TASKS AND RESPONSIBILITIES, COMMUNICATION

Team building

When assigning tasks, you should make an effort to ensure that they match the interests and skills of the people you want to involve. For example, the organisation of trips can be delegated to people who like to travel. You will often find that they know very well what you need to do to prepare for your trip. They know where to get the European Health Insurance Card, what to pack in the suitcase, how to buy tickets or hire a coach. Others will excel in tasks related to project promotion or progress analysis and evaluation.

Sometimes, it turns out that certain tasks need to be outsourced to professionals to reduce risks, ensure a high quality of results, or save in-house staff time due to other school duties. When using external support, you must comply with the regulations relating to the procurement of goods and services applicable to the institution (it may be necessary to work more closely with representatives of the governing body – especially if it is a public sector entity). In such a situation, it is helpful to consult the Erasmus+ Quality Standards[QR], which precisely describe subcontracting and cooperation with external parties.

Division of tasks

The engagement of professionals for certain tasks in the project is allowed. This form of collaboration can be used to share experiences or develop the skills of school staff.
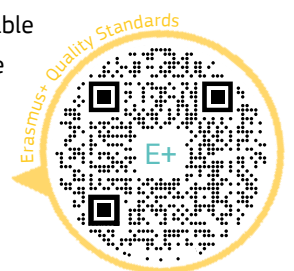
Establishing means of communication

Once the project team has been built and responsibilities assigned, rules and means of communication should be established. It is a good idea to schedule regular meetings, appoint supervisors for each project stage and learn their views on reporting. Establishing these rules at the outset and ensuring that everyone follows them is important.

5.2. QUALITY MANAGEMENT

Overseeing the quality of all the activities carried out is a key task of the coordinator or the project management team. The quality of the activities undertaken can be affected by any staff decision, the choice of forms of competence development during the trips, the definition of milestones in the project, and the course of monitoring activities, evaluation or risk management within the project.

What is important at the beginning?

➲ **Proper project scheduling:** identifying milestones and potential risks, distinguishing between activities and tasks, and setting deadlines for each step of the project. It is worth bearing in mind that the school may be organising many other events at the same time – several different tasks may need to be carried out simultaneously – and this should also be taken into account in the project plan. The availability of responsible individuals at crucial moments in the implementation of the activities will have a positive impact on the quality of the initiative.

➲ **Preparing and implementing an evaluation plan** (see Chapters 2 and 3): evaluation involves assessing the progress of activities carried out within the project and the extent to which they contribute to achieving the intended objectives.

Was it worth it? – This is the simplest question
a project evaluation report should answer.

The evaluation study should take at least three perspectives:

➲ that of the programme or granting authority (Erasmus+, European Commission, National Agency),
➲ that of the beneficiary (implementing school, governing body),
➲ that of the participants (pupils, school staff, and individuals/groups targeted through dissemination and promotion efforts).

In addition, it is worth to consider how the project has affected the school environment, e.g. residents using the facilities, friendly educational institutions, community organisations, the governing body.

The information collected and analysed can take the form of:

➲ quantitative data – presented as numbers or statistical summaries (sometimes—though not always rightly—these are considered more objective and reliable).
➲ qualitative data – texts created based on observations, recorded statements, or documents (often addressing subtle issues and providing insight into the perspectives of those involved in the study).

Good to know

In investment projects (e.g. housing developments or purchasing sports hall equipment), qualitative data are rarely analysed. However, in non-investment projects, such as educational initiatives, this information is as important as quantitative data.

When to carry out an evaluation study?

➲ **ex-ante**: in the first phase of a project, the relevance of the selection of objectives, activities and planned outcomes can be assessed by relating them to the problems the project implementer intends to solve or minimise,

- **mid-term**: amid the rush of tasks, it is worthwhile to revisit the project objectives, viewing them through the lens of early results. It is necessary to summarise each stage of the implementation of the individual tasks in order to verify whether the activities currently being undertaken lead directly to the set objectives, and whether additional factors have emerged which may jeopardise the achievement of the objectives or lead to additional benefits (added value). Sometimes the results of the mid-term evaluation may indicate the need for changes in the work plan (e.g. schedule adjustments or budget revisions).
- **ex-post**: the evaluation following the completion of the project should determine the extent to which the project objectives have been achieved, whether the effects achieved are sustainable, and which activities have been most effective.

The final evaluation report should serve as a guideline for the initiative implementers in the management of future projects

Key project evaluation criteria:
- **relevance** – the alignment of the content and delivery methods of the initiative with the expectations and learning opportunities of the participants,
- **efficiency** – examining whether costs incurred and resources used were appropriate to the objectives achieved,
- **effectiveness** – assessing the extent to which the objectives have been achieved,
- **usefulness** – determining the applicability of project results for the school's future work,
- **sustainability** – an analysis of the extent to which experiences resulting from the implementation of the tasks will be used both by the project initiator and by the recipients of dissemination activities in the years following the end of the initiative.

Expectations for evaluation outcomes can be expressed through specific questions, such as:
- Have all objectives been fully achieved? What indicates this? If not, why?
- Could better results have been achieved using different work methods?
- Do the results satisfy the participants? Have they improved their situation?
- Will the results be noticeable several years after the end of the initiative?
- Will the school benefit from the project's achievements in the future?

Setting evaluation criteria and research questions will help to plan the methods and frequency of the evaluation

The evaluation of educational projects is based on several proven methods:
- survey,
- case-study,
- observation,
- expert feedback,
- desk research,
- individual in-deph interviews (IDI),
- focus group interviews (FGI).

*The results of a properly planned and conducted evaluation
are an invaluable source of knowledge for project implementers,
often serving as inspiration for new and increasingly better initiatives,
as well as an excellent means of disseminating the initiative's results.*

Why is it worth checking the effects of project activities on an ongoing basis?

- **Analysis of evaluation results** – a well-conducted mid-term evaluation makes it possible to eliminate risks in a project. And why is that? Because it enables continuous monitoring of whether the activities are achieving the intended outcomes. For example, if you are organising a stay for two groups of pupils at a hosting school, and the first group returns dissatisfied because the programme was not tailored to their level, this would be a good time , for instance, to change the hosting institution, renegotiate collaboration terms, or improve the programme.

- **Conducting multidimensional project activity monitoring** – activities in this area should focus on the level of achievement of results. Monitoring can be assigned to specific individuals, with oversight of this process entrusted to, for example, the project coordinator or institution director, as they oversee the entire project. Ongoing observation of activities can be considered either as part of evaluation or as part of risk management.

5.3. RISK MANAGEMENT

Developing strategies to mitigate risks requires identifying potential situations that could arise and adversely affect the project. Risk identification stems from your knowledge of reality and what could potentially happen. You can use methods that facilitate or organise risk identification, such as brainstorming sessions or gathering input from each project team member. Once potential risks are identified, they should be analysed in terms of their likelihood of occurrence and their negative impact on the project. Risk mitigation strategies should address only those situations that are highly probable and will have significant negative impacts on the project implementation. The mitigation strategy for a particular risk should state who is responsible for taking measures to prevent the risk from occurring, and what measures will be taken when the risk occurs[8].

Examples of risk minimisation in a project:

- creating a reserve list of participants,
- setting up a substitution system (each person in key position should have a designated substitute who can take over responsibility for the process),
- * conducting regular monitoring and evaluation to address emerging problems promptly, fix schedule flaws, or establish corrective measures.

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[8] Source: Fijałkowska, A. et al. (2018). From the Need to the Project Idea. Erasmus+ School Education. Guide for Schools (p. 29). Warsaw: FRSE Publishing.
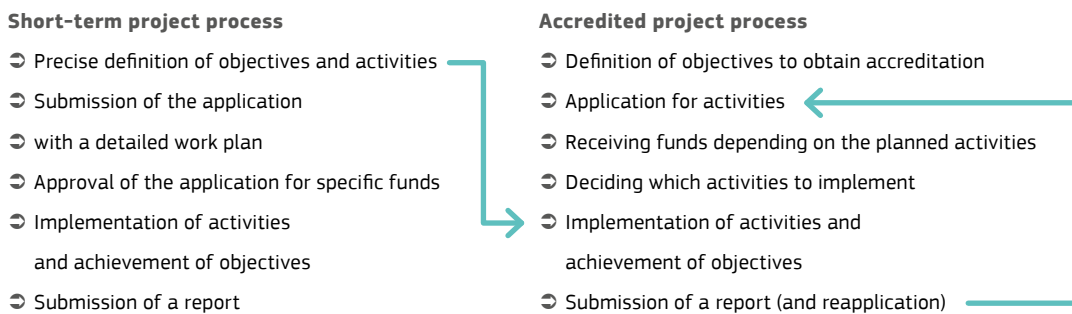
5.4. FINANCIAL MANAGEMENT

The expenditure of funds awarded for an Erasmus+ mobility project follows a financial cycle consisting of project planning, contracting, implementation, and settlement. Each of these stages should be thoroughly planned during the application process to enable the institution to fully achieve its objectives and make efficient use of the awarded funding. This part of the guide is intended to help beneficiaries manage financial resources effectively to facilitate a smooth financial balance for the project.

In the new Erasmus+ financial perspective, two types of mobility projects are available. The management of awarded funding differs slightly between them and is linked to the stages of initiative implementation.

Figure 11. Comparison of the process of a short-term project with that of an accredited project

Short-term project process
- ➲ Precise definition of objectives and activities
- ➲ Submission of the application
- ➲ with a detailed work plan
- ➲ Approval of the application for specific funds
- ➲ Implementation of activities and achievement of objectives
- ➲ Submission of a report

Accredited project process
- ➲ Definition of objectives to obtain accreditation
- ➲ Application for activities
- ➲ Receiving funds depending on the planned activities
- ➲ Deciding which activities to implement
- ➲ Implementation of activities and achievement of objectives
- ➲ Submission of a report (and reapplication)

5.4.1. FINANCES IN A SHORT-TERM MOBILITY PROJECT IN THE SCHOOL EDUCATION FIELD

A short-term project has a classic funding scheme. This means that it has been allocated a specific budget for planned activities, which will be settled according to specified budget categories. Financial management follows the main stages of the project's financial cycle.

planning + implementation + evaluation + reporting + audits = main stages of the project's financial cycle
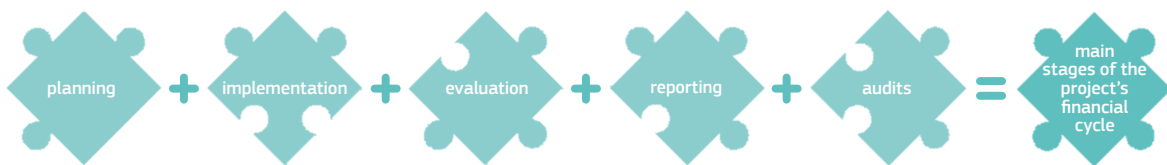
Planning

The estimation of the grant value takes place at the stage of filling in the application form. The amounts therein are calculated automatically when specific activities are selected. The project budget is allocated upon signing the grant agreement.

The beneficiary takes the first steps in managing project finances already during the preparation of the agreement. On the basis of recommendations from experts, the National Agency review possible

Implementation

errors in the budget calculation or report the necessity to exclude specific activities from the budget.

The project grant agreement specifies the amount of the Erasmus+ funding awarded and sets out the settlement rules. Signing the agreement by both parties finalises the project budget, which is annexed to the agreement. Any change during the implementation of the project must be consulted with the
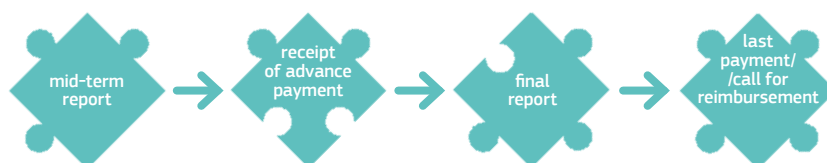
designated employee of the National Agency and its acceptance requires the signing of an annex to the agreement.

After a maximum of 30 calendar days from the date of signature of the agreement by the last of the parties, the National Agency shall make the first advance payment for the project. It is very important that the beneficiary takes into account the deadlines for the disbursement of the funding as part of the planning of the project activities. This will ensure that the time it takes for the National Agency to make the transfer of funds does not delay the implementation schedule of the substantive activities.

Evaluation

During the implementation of a project, it may be necessary to introduce changes to the activities. We recommend consulting with National Agency staff regarding proposed project modifications. It is important to note that the overall amount of awarded funding cannot be increased.

In projects where payments are divided into smaller instalments, the beneficiary shall submit a mid-term report detailing the actual progress of the project implementation, the number of mobilities completed and the expenses incurred. The reports should be submitted according to the deadlines stipulated in the grant agreement, as the timing of the submission of a correct mid-term report determines the timing of the next funding instalment and thus the project's financial liquidity.

Reporting

mid-term report → receipt of advance payment → final report → last payment/ /call for reimbursement

Audits

An audit may be conducted within five years of project completion and settlement. It may be initiated by the European Commission, the National Agency, the European Court of Auditors, or the European Anti-Fraud Office. Occasionally, audits are also carried out following complaints by participants or partner organisations regarding improper settlement or non-payment of funds due to them. Depending on the outcome of the audit, the National Agency may revise the final settlement of the project and, if irregularities are found, request reimbursement of undue funding..

5.4.2. FINANCE IN AN ACCREDITATION PROJECT

In the Erasmus+ School Education field, the budget of accredited projects is calculated on the basis of the activities or mobilities planned in a given period. Beneficiaries describe these in the grant application (KA 121 SCH). Accreditation applications (KA 120 SCH) do not have a budget section and accreditation alone is not sufficient to receive funding for activities.

Steps for awarding grants under accredited projects
➲ To obtain a grant for the implementation of activities under accreditation, a grant application (KA 121 SCH) must be submitted. In it, the beneficiary does not indicate the specific amount requested, but only the number and type of mobility and the support amount in the „exceptional costs" category.

- On the basis of these declarations, the National Agency calculates the funding amount in accordance with the allocation rules accepted by the European Commission for the financial year in question.
- The calculation involves the use of a calculator prepared by the Commission, which is based on average rates.
- The awarded funding amount is not divided into individual budget categories. However, standard financial management principles still apply.
- The beneficiary independently distributes the budget, taking into account the applicable unit rates (e.g. organisational support, individual support, course fees, travel support). As a result, individual parts of the grant are allocated to specific activities.
- The application cycle can be repeated until the end of the current Erasmus+ financial perspective.
- Each accreditation project agreement requires the submission of a final report.

Flexibility means more freedom, but also more work and great responsibility

The flexibility of accreditation lies in greater freedom of choice, in terms of, for example, partner institutions or course and training organisers. There is also no need to decide on a particular country right away. If the awarded funds do not cover travel to more remote regions or to countries belonging to the so-called more expensive group, you can plan visits closer to home. After a year, you have the chance to review your plans and, if necessary, extend the project from the standard 15 months to two years.

You also do not have to apply for funding each year to implement the activities as part of your accreditation. If you want to take a break from organising mobility, you may skip applications for up to two consecutive years. However, it is worth remembering that at the end of the 2021–2027 financial perspective, your institution will be held accountable for the activities planned in the accreditation application. At that time, each accredited beneficiary will have to prove that it has succeeded in achieving the set objectives.

When implementing a project, you create activities, but also ensure that you follow the rules of the programme, including the funding rules. Remember that the final report accounts for both the quality – i.e. the level of achievement of the outlined objectives – and the way the grant was spent.

Remember
- Specific support rates and funding rules apply to projects implemented under accreditation, as described in the Erasmus+ Programme Guide and published on the website of the National Agency.
- To design a budget for an initiative, you will need to divide the awarded grant amount into individual mobilities yourself, calculating the cost of each of them, e.g:

Mobility 1 = organisational support + travel + individual support + other amounts (e.g. course fee, preparatory visit)

+

Mobility 2 = organisational support + travel + individual support + other amounts (e.g. course fee, preparatory visit)

The budget categories take the form of
➲ unit costs/contributions,
➲ actual costs/costs actually incurred

Unit costs
➲ travel,
➲ individual support,
➲ organisational support,
➲ inclusion support for organisations,
➲ linguistic support,
➲ course or training fees,
➲ preparatory visits.

Travel

The amount of the travel funding depends on the number of kilometres calculated on the basis of the distance calculator. When settling accounts with the National Agency, the amount of the actual travel costs does not matter, i.e. it is not important whether they are higher or lower than the eligible rate. The participant may travel by any means of transport, but may also use environmentally friendly means of transport (green travel). The amount is allocated to cover the participant's travel to and from the project activity.

The grant is calculated by multiplying the number of participants by the unit rate in the travel cost category, depending on the rates set for the distance covered.

The rates range from:
➲ between EUR 28 and EUR 1,735 per participant depending on the distance
– for standard travel,
➲ between EUR 56 and EUR 1,735 per participant depending on the distance – for green travel.

„'Distance' means the distance between the location of the sending organisation and the location of the hosting organisation, 'amount' includes funding for return travel.

Individual support

The funding covers the costs for accommodation, meals, possible local travel or other individual costs of the mobility participant and accompanying persons (if applicable) during the project activity. Under specific circumstances, subsistence costs may be eligible for travel time before the start and after the end of the activity. In such cases, a maximum of two travel days are covered for participants subject to the standard rate (non-green travel), while for participants travelling via environmentally friendly transport (green travel), additional days may be added on the basis of the European Commission guidelines for the year in question, as described in the annually updated Erasmus+ Programme Guide.

Organisational support

This category includes costs directly related to the implementation of the mobility which are not covered by other cost categories. For example: preparation (pedagogical, intercultural and other), mentoring, monitoring and support of participants during mobility activities, services, tools and equipment needed to set up virtual

components in blended activities, recognition of learning outcomes, sharing results and making the European Union funding visible to the public..

As part of the organisational support, the beneficiary may finance, among others:

➲ insurance for participants,
➲ foreign language course before participants' departure (as part of linguistic preparation for travelling abroad),
➲ purchase of educational, teaching and training materials,
➲ equipment and protective clothing for mobility participants (as long as they are necessary for the project),
➲ purchase of necessary visas (e.g. for Turkey) for project participants,
➲ salaries of persons involved in the project (e.g. coordinator, accountant).

Rates in the organisational support category:

EUR 100
➲ per learner in group mobility,
➲ per participant in staff mobility for courses and training
➲ per invited expert,
➲ per hosted teacher or educator.

EUR 350 up to 100 participants / EUR 200 over 100 participants
➲ per participant in the case of individual learning mobility of adult learners,
➲ per participant in staff mobility for job shadowing and teaching or training assignments / per course or training

EUR 500
➲ per participant in long-term learning mobility of adult learners.

Inclusion support for organisations

This category covers all costs related to organising the mobility of people with fewer opportunities, whose participation in the project would not have been possible without additional support.

To be eligible for this type of support, the beneficiary should document that the participant in question falls into one of the categories of people with fewer opportunities. These include individuals who face barriers preventing them from benefiting from the programme due to economic, social, cultural, geographical, or health-related reasons; migrant backgrounds; or factors such as disability, learning difficulties, or any other reasons, including those that may lead to discrimination as outlined in Article 21 of the Charter of Fundamental Rights of the European Union.

Linguistic support

Participants in staff mobility lasting longer than 30 days as well as short-term and long-term individual learner mobility may receive linguistic support of EUR 150 towards the cost of training and learning materials for the specialised vocabulary the participants will use during their study or course. Funding is granted only if a participant entitled to Online Language Support (OLS) is unable to use it due to the unavailability of a course in a particular language at a particular level. This condition does not apply to reinforced support for participants in long-term pupil learning mobility.

Course or training fees

This category covers the fee for the course or training attended by each participant. Only the number of days spent participating in such project activities is considered, excluding travel time. This

method of qualifying course fees applies at the planning stage and during the calculation of project funding. The daily funding rate is EUR 80 per day per participant in a given project, however, a maximum of EUR 800 per project can be awarded to a participant, regardless of how many such mobility activities they participate in.

Preparatory visits

A maximum of three persons can participate in a visit, each receiving EUR 680. This is a flat rate including travel and subsistence costs.

Actual costs (actually incurred)
- exceptional costs,
- inclusion support for the participant.

Exceptional costs

In the case of virtual activities organised due to the coronavirus pandemic, part of the grant may be used to purchase or rent equipment and services necessary for the implementation of the project activities. The grant shall cover a maximum of 75% of the eligible costs accepted by the National Agency at the final report assessment stage. The eligibility of the cost is conditional on the use of equipment or services necessary for the implementation of the virtual activities.

Inclusion support for participant

Additional costs directly related to persons with fewer opportunities and accompanying persons (including travel and subsistence costs, unless they are requested to be covered under the "travel" or "individual support" budget category).

The grant shall cover up to 100% of the eligible costs, as accepted by the National Agency at the final report assessment stage.

The following costs may be considered ineligible:
- return on capital and dividends paid by a beneficiary,
- debt and debt service charges,
- provisions for losses or debts,
- interest owed,
- doubtful debts,
- exchange losses,
- costs of transfers from the National Agency charged by the beneficiary's bank,
- costs of opening and administering bank accounts (including costs of transfers from or to the National Agency or the Executive Agency charged by the beneficiary's bank),
- contributions in kind from third parties,
- excessive or reckless expenditure,
- deductible VAT.

**Ineligible costs in Erasmus + projects**

Exchange rate policy

All payments made by the National Agency to the beneficiary shall be made in euro. In Poland beneficiaries may keep their accounts in euro or polish zloty. The Polish National Agency recommends that beneficiaries indicate a euro bank account to avoid **exchange** rate differences. Financial statements shall also be presented in euro.

For both funds received and funds subject to (subsequent) reimbursement, the beneficiary:

- may apply its own exchange rate policy – in the case of budget categories settled by lump sums,
- may apply the exchange rate policy defined in the grant agreement – in the case of actual costs. In this case, for conversion of costs incurred in currencies other than the euro, the monthly exchange rate published on the European Commission's**QR** website and in force at the date the last of the two parties signed the grant agreement shall be used.
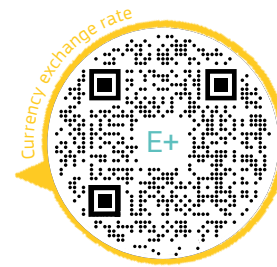
The National Agency shall not inform the beneficiary of the conversion rate on the date of the payment.

Remember

- For reporting purposes, beneficiaries shall keep project documentation and evidence of the implementation of each activity for a period of 5 years from the date of completion of the initiative.
- A list of the aforementioned documents can be found in Annex III to the Grant Agreement – Financial and Contractual Rules**QR**.
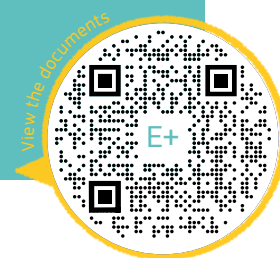
Reduction of funding due to poor project implementation

The final report shall be assessed on the basis of qualitative criteria and by means of a **100-point scale**. The grant reduction applies to organisational support and shall be equal to:

- **10%**, when the score is at least 50 points but less than 60,
- **25%** when the score is at least 40 points but less than 50,
- **50%** when the score is at least 25 points but less than 40,
- **75%** when the score is less than 25 points.

In addition, the National Agency may reduce or not pay at all the organisational support grant if the assessment of the final report, the monitoring visit or the on-site visit reveals that the Erasmus+ Quality Standards for the proper management of mobility activities have not been respected.

Note

The guidelines of the National Agency relating to the specificity of the Erasmus+ project funding do not exempt the beneficiary from compliance with the provisions of the national law, public finance and accounting laws or regulations on tax and fiscal control. They only include financial rules and guidelines to be followed in the implementation of the activities and in the preparation of the final project reports to the National Agency.

PROJECT MANAGEMENT IN PRACTICE

Remember to:
- Separate the costs and revenues of the project in the accounting records;
- Describe source documents in such a way that they can be attributed to the project;
- Properly conclude the agreement with the participant;
- Minimise exchange rate differences;
- Negotiate currency exchange rates with the bank;
- Ensure costs are reasonable, purposeful, and justified;
- Avoid conflicts of interest;
- Maintain high quality of the implemented activities;
- Monitor the project's budget and use it in its entirety;
- Collect all documents specified in the grant agreement and Annex III – Financial and Contractual Rules;
- Adhere to all deadlines for submitting or sending required documents to the National Agency.

5.5. DISSEMINATION AND PROMOTION

Every activity produces an outcome. In Erasmus+ projects, the key outcomes are skills, experiences, and changes in the attitudes of pupils or teachers regarding various aspects of learning and development.

Organisations benefiting from Erasmus+ support should share the results of their initiatives and, in doing so, promote the programme. The aim of these activities is to maximise the use of acquired knowledge, experiences, and any products developed within the project.

When planning dissemination activities, focus on reaching the largest possible number of people or institutions that may want to benefit from your experience.

Remember
- Every dissemination activity involves promotion, but not every promotional activity involves dissemination.
- Promotion accompanies dissemination (both types of activities enhance project results), but it focuses on information, ideas, or values rather than on the outcomes themselves.
- Refer to the European Commission's guide How to communicate your project[QR], which will support you step by step in your promotional and dissemination activities.

If your project outcomes aim to improve pupils' English language skills, increase parental or local partners' involvement in the school, or achieve similar goals, these objectives are likely shared by other schools. For staff facing similar challenges, learning about a successful project in detail would be invaluable. It is worth telling other teachers how the initiative was planned, how the analysis of pupils' competences proceeded and how it influenced the planning and formulation of activities, what was included in the

curricula of the courses teachers took part in, and how mobility preparations were carried out. In short, it is worth sharing everything that has been achieved for the benefit of the project participants, the school and its environment.

Once you have planned the results of your substantive activities, consider treating dissemination as a separate project. Target it at a specific audience, formulate SMART objectives, or define the results of activities carried out within a fixed time period, using specific inputs, resources or methods.

Example

One objective of dissemination could be to present to the 50 regional primary schools the course and results of the project and to encourage their staff to become part of the Erasmus+ community. The objectives can be considered achieved when:

⮑ At least 50 primary schools receive an email informing them to visit a website where accounts of all project activities have been published.

or:

⮑ At least 20 schools attend an open day at your institution where you present the project and pupils perform an English-language satirical programme and showcase their language skills.

or:

⮑ At least one municipal school develops its own project based on your experiences.

⮑ 10 schools from the region use the cultural workshop scenarios you have published and developed during the mobility preparation phase.

It is up to the project authors to decide which dissemination objectives they will choose and which dissemination activities they will include in the work schedule. The quality of the dissemination plan is carefully analysed during the evaluation of the grant application. Innovation, efficiency and promotion of the programme's potential are taken into account.

Note

Do you still remember what the added value is? Certainly, the added value of dissemination activities can be the strengthening of the school's position in the local educational market. Promotion of the school is one of the important considerations to be taken into account in the dissemination plan.

In your application for accreditation or funding for a short-term project, you will encounter many questions about other issues not related to mobility, such as:

Summary

⮑ What type of hosting organisations do you plan to work with?

⮑ What are the main activities of your organisation?

⮑ What is the profile and age of the learners your organisation works with?

⮑ What are the most important needs and challenges your organisation is currently facing?

⮑ What do you want to achieve? How is this objective linked with the needs and challenges you have described in the previous question?

⮑ How are you going to evaluate if the objective has been reached?

- How will your organisation engage with the core principles set out in the Quality Standards?
- Who will be responsible for the selection of participants, their preparation and support during the activity?
- How will your organisation incorporate the results of the completed mobility into its core activities?
- How will your organisation share the results of its activities and knowledge of the programme:
  - **a.** within the school environment?
  - **b.** with other organisations and the general public?

Answering these questions should not be difficult for those who have spent enough time researching their needs and planning their objectives and activities.

When planning a project, you face many doubts and obstacles. However, it is also a time when you decide how you will shape the future of your pupils, school, community, and country.

If you approach this adventure with courage and ambition, you can count on positive results at every stage of implementation. They will become a source of satisfaction for the project team and a point of pride for the whole school and its community.
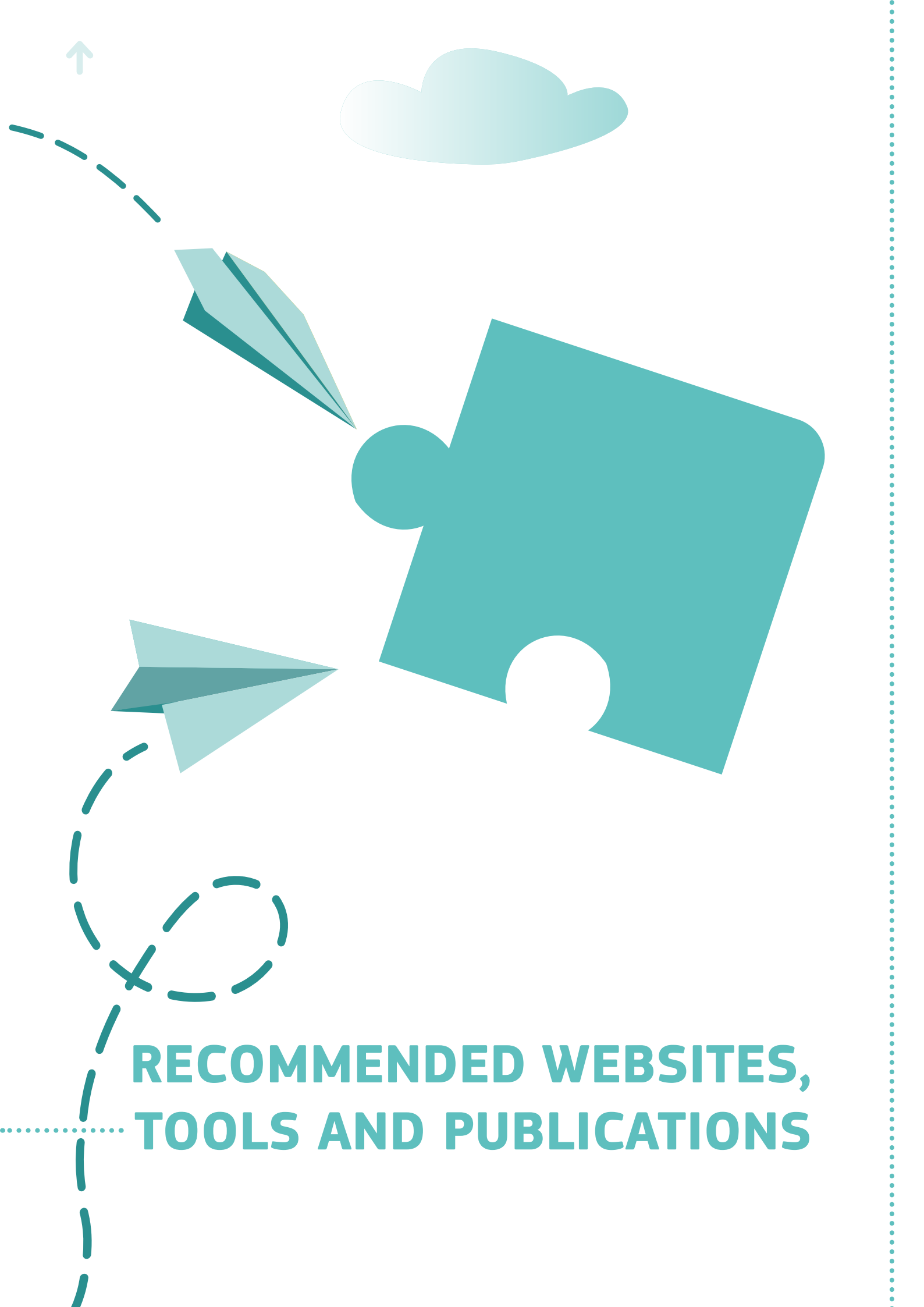
RECOMMENDED WEBSITES, TOOLS AND PUBLICATIONS

Documents applicable to applicants

- Erasmus+ Programme Guide
- Call for Proposals
- Guide for Experts on Quality Assessment
- Electronic Application Form Template

Information about the Erasmus+ programme / School Education field/ Key Action 1

- Erasmus+ programme Polish website: erasmusplus.org.pl
- Erasmus+ School Education field website: erasmusplus.org.pl/edukacja-szkolna
- European Commission website: ec.europa.eu

Document templates

- Forms for EU contracts: bit.ly/3X4aJNs

Platforms and tools to facilitate communication

- European School Education Platform: school-education.ec.europa.eu/pl
- Erasmus+ Project Results Platform: erasmus-plus.ec.europa.eu/projects
- eTwinning platform: school-education.ec.europa.eu/pl/etwinning
- European School Education Platform - searching for partners: bit.ly/3WjsQMf
- Exchange rate on the European Commission website: bit.ly/3YrWnFG

Publications, guides, instructions

- Erasmus+ Programme Guide: bit.ly/3VZcB7B
- FRSE publication *From the Need to the Project Idea. Erasmus+ School Education. Guide for Schools* (2018 edition): www.frse.org.pl/czytelnia/from-the-need-to-the-project-idea
- European Commission guide How to communicate your project (2021 edition): bit.ly/3BFBahv
- European Commission guide on individual short- and long-term mobility Erasmus+ handbook for individual pupil mobility in school education: bit.ly/3TDISyS
- Other publications of the Polish National Agency for the Erasmus+ Programme and the European Solidarity Corps: czytelnia.frse.org.pl

A well-planned project meets the needs of both the applicant and participants but also requires thorough preparation and efficient management of its activities. This guide brings together valuable information on the key elements of managing a mobility project in the Erasmus+ School Education field and the possible directions for preparing for its implementation. However, this is not a manual, but a guide – full of examples and practical comments, with exercises and tips related to each phase of the project lifecycle. It offers guidance, teaches, and illustrates the various stages of a project's lifecycle, helping to understand what effective management of educational initiatives is all about.

www.erasmusplus.org.pl