



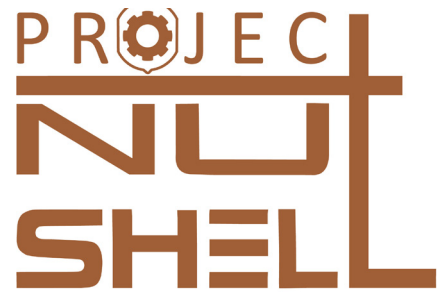
PROJECT
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Erasmus+ Project Management Toolkit for Higher Education Institutions

IO3 Nutshell



Co-funded by the
Erasmus+ Programme
of the European Union



Erasmus+ Project Management Toolkit for Higher Education Institutions

IO3 Nutshell

April 2023

CESIE



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**Erasmus+ Project Management Toolkit
for Higher Education Institutions**

Foreword

The project management capacity and ability to participate effectively in major EU funding programmes are vital to the modernisation and internationalisation of Higher Education Institutions (HEIs). The Nutshell project aimed to improve partner universities' international project management performance through a dual approach:

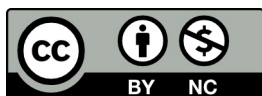
- > By deepening the functioning of internal organisational processes related to project management and providing solutions to enhance and simplify them;
- > By providing the university community members, especially those with less experience, with relevant skills and tools.

Thus, they can elaborate competitive project proposals, access the funding opportunities established by the European Union (in particular the Erasmus+ Programme), manage approved projects following internal university procedures and respect the rules and conditions of the funding bodies.

Through these activities, Nutshell supports universities to take the opportunities provided by the Erasmus+ Programme, allowing the development and transfer of innovative practices, implementing joint initiatives promoting cooperation, peer learning and exchange of experience at the European level and beyond.

Nutshell is a project funded by the Erasmus+ Programme – Strategic Partnerships for Higher Education. It is coordinated by [Prague University of Economics and Business](#) (Czech Republic), in cooperation with the [University of Ljubljana](#), Faculty of Social Science (Slovenia), [Humak University of Applied Science](#) (Finland) and [CESIE](#) (Italy).

Where to find this Toolkit: <https://cesie.org/en/resources/project-nutshell-toolkit/>



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List of abbreviations

EACEA	European Education and Culture Executive Agency
EC	European Commission
NA	National Agency
PIF	Partner Identification Form
OID	Organisation ID
FTOP	Funding and Tender Opportunities Portal
KA	Key Action
PM	Project Management
LFM	Logical Framework Matrix
HEI	Higher Education Institution
VET	Vocational Education and Training
CP	Cooperation Partnership
CBHE	Capacity Building projects in the field of higher education

Erasmus+ Project Management Toolkit for Higher Education Institutions

Who is it for?

This **toolkit** is a **collection of resources** aimed at administrative and academic staff and PhD students who wish to coordinate or become partners of **Erasmus Plus projects, particularly under Key Action 2 – Cooperation among organisations and institutions**.

How was it developed?

The first step for developing the Erasmus+ Project Management Toolkit for Higher Education Institutions (HEIs) was a survey conducted among the Nutshell partnership. The survey allowed us to identify challenges, needs and good practices regarding all stages of international project management and reflect on the steps we could facilitate using specific tools.

The survey followed the structure of the project management process, as defined by the PMI's PMBOK Guide.

The Guide suggests grouping processes into phases:

1. Initiation; 2. Planning; 3. Executing; 4. Monitoring and controlling; 5. Closing.

For each of these phases, respondents (administrative staff, academics or researchers and financial office representatives) were to identify the following:

- > challenges and needs they have when performing these kinds of tasks;
- > good practices or tools used in their Institutions.

Based on their answers, we selected the tools and best practices presented in the toolkit. With the contribution of all the project partners, a series of practical tools, step-by-step guides, models, and concrete cases have been collected or developed. The toolkit was tested by 44 administrative staff (including financial officers), academic staff and Ph.D. students, both experts and non-experts in EU project management. This version of the toolkit incorporates their suggestions and feedback.

Erasmus+ in (a) Nutshell, which calls?

Erasmus+ is a broad programme that provides different types of opportunities to individuals and organisations, including mobility opportunities for students and staff, opportunities for cooperation between education, research and business, and support for developing new EU policies.

This toolkit contains several tools to navigate specific calls for proposals under **Key Action 2 – Cooperation among organisations and institutions** of the Erasmus+ Programme. These actions foster collaboration between different types of organisations (such as those involved in the Nutshell project) and result in the development, transfer and/or implementation of innovative practices at organisational, local, regional, national or European levels.

! The selected calls provide examples of actions managed by the National Agencies (decentralised actions) or by the European Education and Culture Executive Agency (centralised actions).

For a complete overview of all the opportunities the Erasmus+ Programme provides, please read the most up-to-date version of the Guide: <https://erasmus-plus.ec.europa.eu/programme-guide/erasmusplus-programme-guide>.

Key Action 2 – Cooperation among organisations and institutions

Partnerships for Cooperation

Cooperation Partnerships:

The primary goal of the Cooperation Partnerships is to allow organisations to increase the quality and relevance of their activities, to develop and reinforce their networks of partners, to increase their capacity to operate jointly at transnational level, boosting internationalisation of their initiatives, and through exchanging or developing new practices and methods as well as sharing and confronting ideas.

It is a decentralised action managed by National Agencies.

Project applications to submit through the Erasmus+ and European Solidarity Corps Platform: <https://webgate.ec.europa.eu/erasmus-esc/index/> (except for the Partnerships in the fields of education, training and youth submitted by European NGOs and for Partnerships in the field of sport managed by the European Education and Culture Executive Agency (EACEA).

To learn more about this action, check the dedicated page on the Erasmus+ online Guide: <https://erasmus-plus.ec.europa.eu/programme-guide/part-b/key-action-2/cooperation-partnerships>.

Partnerships for Innovation

Alliances for Innovation

This action aims at fostering strategic cooperation between key players in higher education and vocational education and training, business and research – the “knowledge triangle”. The goal is to promote the innovation and modernisation of educational and training systems when identifying and supplying the right set of skills, knowledge and competencies to match the future labour market needs in sectors and fields that are strategic for Europe’s sustainable growth and competitiveness.

- > It is a centralised action managed by the EACEA.
- > Project applications to submit through the Funding and Tender Opportunities Portal (FTOP): <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home>.
- > It is possible to achieve the objectives of Alliances for Innovation by applying to one or both of the following Lots:
 - LOT 1 Alliances for Education and Enterprises,
 - LOT 2 Alliances for Sectoral Cooperation on Skills (implementing the ‘Blueprint’).
- > To learn more about this action, check the dedicated page on the Erasmus+ online Guide: <https://erasmus-plus.ec.europa.eu/programme-guide/part-b/key-action-2/alliances-innovation>.

Forward-looking Projects

This action supports innovation, creativity and participation, and social entrepreneurship in different fields of education and training within or across sectors and disciplines. Forward-Looking Projects are large-scale initiatives aiming to identify, develop, test and/or assess innovative (policy) approaches that can be mainstreamed, thus improving education and training systems. The ideas they promote should respond to critical European priorities and give input for improving education, training and youth systems. They should innovate methods and practices for all types of learning and active participation settings for Europe’s social cohesion.

- > It is a centralised action managed by the European Education and Culture Executive Agency (EACEA).
- > Project applications to submit through the Funding and Tender Opportunities Portal: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home>.

- > It is possible to achieve the objectives of Forward-looking Projects by applying to one or more of the following Lots
 - LOT1 Cross-sectoral priorities,
 - LOT2 Vocational Education and Training (VET),
 - LOT3 Adult Education (AE).
- > To learn more about this action, check the dedicated page on the Erasmus+ online Guide: <https://erasmus-plus.ec.europa.eu/programme-guide/part-b/key-action-2/forward-looking-projects>.

Capacity Building projects in the field of higher education

Capacity Building projects in the field of higher education:

This action supports international cooperation projects based on multilateral partnerships between organisations active in the Higher Education field in EU Member States or third countries participating in the Programme and third countries not associated with the Programme. They aim to support the relevance, quality, modernisation and accessibility of higher education in third countries not related to the Programme as a driver of sustainable socio-economic development.

- > It is a centralised action managed by the European Education and Culture Executive Agency (EACEA).
- > Project applications to submit through the Funding and Tender Opportunities Portal: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home>.
- > It is possible to achieve the goals of Capacity Building projects in the field of higher education by applying to the following Strands:
 - Strand 1 Fostering access to cooperation in higher education,
 - Strand 2 Partnerships for transformation in higher education,
 - Strand 3 Structural reform projects.

To learn more about this action, check the dedicated page on the Erasmus+ online Guide: <https://erasmus-plus.ec.europa.eu/programme-guide/part-b/key-action-2/capacity-building-higher-education>.

Visit the following Erasmus program official web page to see which actions of the program are managed by which agency and **where to apply** <https://erasmus-plus.ec.europa.eu/resources-and-tools/how-to-apply/where-to-apply>.

Structure of the toolkit

The Erasmus+ Project Management Toolkit for Higher Education Institutions consists of this introductory document and four separate folders with the tools. The toolkit offers ready-to-use tools collected or created by the Nutshell partnership based on the concrete experience of participating in the Erasmus+ Programme and the actions described in the previous paragraph: *“Erasmus Plus in Nutshell, what calls?”*.

We have simplified the five phases of project management and grouped the tools into three phases:

Phase 1 - Proposal development and launch

You can find all the activities to start a project, from identifying the right call to preparing a proposal. This phase ends with the proposal submission.

Phase 2 - Project Execution

This phase starts after receiving notification that your project has been selected for co-funding. It includes completing the work outlined in the project plan and monitoring and controlling activities.

Phase 3 - Project finalisation

As projects end, you must finalise all project activities, send the report to the relevant authority for approval, and archive all the project documents.

! IMPORTANT NOTE: The Toolkit also contains an additional set of tools consisting of official guides and reference documents released by the EC (last update March 2023).

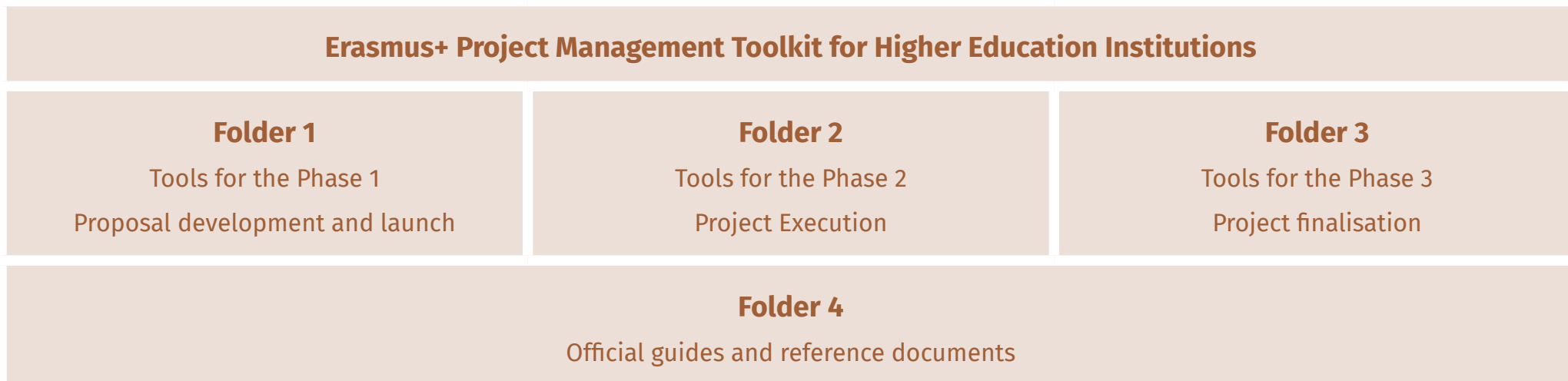


Fig. 1 Structure of the Erasmus+ Project Management Toolkit for Higher Education Institutions

How to use it?

The toolkit is an interactive PDF with links to tools downloadable from the associated folders. Browse the toolkit, identify the Project Management phase you are in, and choose and download the tools you need!

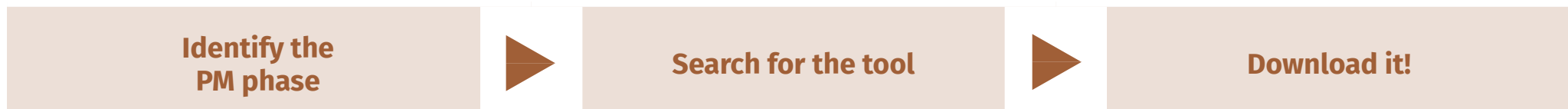


Fig.2 How to use the toolkit

We also divided tools according to four types of tasks to allow you to link them to the offices or responsible staff:



Administrative Task (AT)



Financial Task (FT)



Implementation Task (IT)



Communication & Dissemination Task (C&DT)

! After downloading the tool and before using it, remove the watermark.

Important information

Before using the tools included in this toolkit, you should always:

- > Check the latest version of the Erasmus+ Programme Guide (<https://erasmus-plus.ec.europa.eu/erasmus-programme-guide>) and the most recent Reference documents available in the Participant Portal <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents>) and the Erasmus+ and European Solidarity Corps Platforms (<https://webgate.ec.europa.eu/erasmus-esc/index/>).
- > This toolkit refers to the **Erasmus+ Programme Guide 2023 (Version 2, 21.12.22)**: <https://erasmus-plus.ec.europa.eu/programme-guide/erasmus-programme-guide/introduction>.
- > Consider that you can adapt these documents to different contexts and needs; there is no one-size-fits-all solution.
- > Verify the practices, procedures and tools used in your institution with the international projects office and your colleagues who deal with European project management.

In this section, you can find a set of tools to consult, use, and share to complete the submission of a project proposal through the official online submission portals (Erasmus+ and European Solidarity Corps Platform or FTOP). The purpose of these tools is not to give instructions on how to write a successful proposal but rather **to facilitate some steps of its preparation with ready-to-use templates**. If you are looking for tools for developing a good proposal, check the following handbooks:

- > Annexe 1- Designing the project of the Handbook on the lump sum funding model for KA2 v. January 2023 (<https://www.erasmusplus.it/wp-content/uploads/2023/01/Handbook-on-KA2-lump-sum-2023.pdf>);
- > EU Project Planning and Management Handbook (<https://blogi.eoppimispalvelut.fi/kvprojektiosaaminen/eu-project-planning-and-managementhandbook/>).

This toolkit helps you navigate various Erasmus+ calls for HEIs, approach potential partners and professionally plan a project thanks to some essential tools.



1.1

Erasmus+ deadlines (KA2)

Applicants can submit their proposals during application rounds throughout the year. For instance, the European Commission announced the deadlines for 2023 in the [Call for proposals published on November 23rd 2022](#). There may always be variations in these dates in future, but it is helpful to keep in mind the main submission periods to plan your proposal preparation ahead.



1.2

Project abstract

This simple project abstract template allows you to present basic proposal information. It can be helpful to share it with other staff to facilitate the discussion on the possible proposals to be prepared and identify the team interested in the topic or disseminate information on running projects.



1.3

Partners search channels

Sometimes it is not easy to find the right partners for an EU project among organisations of your existing network. Here we recommend some channels (official participant portals, websites, social networks) useful to identify potential partners and, why not, become partners in other project proposals.



1.4

Invitation letter

Once you have identified the potential partners for your project idea, the next step is to contact them, present the idea and ask for their involvement. A professional way to start the discussion is to send a well-written invitation letter that provides all the relevant information to your interlocutor, as suggested in this template.



1.5

Partner profile (Quality Assurance focus)

Finding a good description of your organisation for your project application may seem easy, but sometimes it isn't. In general, we suggest spending some time creating more than one description that enhances the different expertise of your organisation to adapt it to the project topic and your role. Look at this example targeting Quality Assurance expertise (CESIE Example).



1.6

Partner Identification Form

The Partner Identification Form (PIF) contains the legal data of an organisation (OID, VAT / Tax Code, Address, Contacts, etc.), along with a short presentation, experience, and staff to involve in the project. Use this template to prepare your PIF or request it from your partners if you want to include their organisation in the project through the submission system.



1.7

List of previous projects

To complete an Erasmus+ application form + each partner must list their EU projects approved in the last four years. The list length will vary from partner to partner based on experience. Keeping these lists updated and filled in correctly will save time when uploading this information through the online submission system. Check the requested information according to the call: in this toolkit, the table refers to the ERASMUS Standard Budget-based + LS Type II calls.



1.8

Logical Framework Matrix CBHE - Official document

Planning a project following the Logical Framework approach ensures consistency between objectives, project scope, results and activities. The LFM is a complex yet strategic tool used to support the design, management, monitoring and evaluation of international projects. CBHE influences the evaluation score under the “Quality of the project design and implementation”, which should be included in a table in section 2.1.2 Project management, quality assurance and monitoring and evaluation strategy of the application form. To learn more, please read Section 5- The Logical Framework Approach of the [Project Cycle Management Guidelines](#).



1.9

Network diagram

A network diagram is a graphical representation of project activities and their dependencies. It serves as a valuable tool in the project planning phase and aids in populating the Gantt chart.



1.10

Gantt chart

The Gantt chart is another fundamental tool of Project Management. We can include the Gantt chart in the application form, presenting the timeline for all activities and deadlines for deliverables within the work packages. It is also vital for monitoring and controlling the project's progress. You can complement the chart with a comprehensive description.



1.11

Detailed budget table (ERASMUS LSII)

Among the most important novelties introduced in the Erasmus+ Program for the current period is the financing model based on Lump Sum for all the KA2 projects. There are two lump sum options (specified in the call you are applying for): in type 1) the call for proposals defines a fixed lump sum; in type 2) you define the lump sum in your proposal. When the lump sum is project-based (lump sum type 2), you must submit a detailed budget table with the project budget. It is an official document developed by the EACEA. To fill in the table, follow the instructions on the first sheet. The sheets to fill in are: 'Beneficiaries List', 'Work Package list', 'BE XXX' (one sheet per Participating Organisation), 'Depreciation costs' (if your budget includes the purchase of equipment), and the last column of the 'Proposal Budget' sheet with the Requested EU Grant Amount". To add Beneficiaries to the 'Beneficiaries List' sheet, double click on "Add a Beneficiary" and to add a Work Packages to the 'Work Package list' sheet, double click on "Add a Work Package".

Implementing a project means carrying out several activities to put the project plan into action. The project manager coordinates and directs project resources to meet the objectives and produce the deliverables. The tools included in this section support some activities usually undertaken in an EU project, ranging from coordinating and reporting dissemination activities to organising, evaluating and reporting events, to conclude with some financial management tasks.



2.1

Partners Contractual Agreement A2 Alliances for Innovation

Once your project has been approved you must prepare a partnership agreement: a contract between the project coordinator and all consortium members, defining clear responsibilities and containing the corresponding grant division. The legal representatives of the applicant and partner organisation will sign the partnership agreement. We provide an example written for KA2 Alliances for Innovation project.



2.2

Risk Register

In project management, [risk management](#) requires identifying, evaluating, preventing and mitigating all the risks that may help or prevent an organisation from achieving its objectives. The project coordinator and partners are responsible for overseeing the risk management process throughout the project, communicating these risks and collaborating in handling them. A risk register can support the implementation of a risk assessment strategy and its monitoring.



2.3

Project factsheet

Communication, dissemination and exploitation are essential aspects of all EU projects. A fundamental step in communicating the project's objectives, activities, and expected impacts is the presentation of the same through a factsheet (see [Nutshell example](#)) featured on the partner's institutional website or as a flyer. Adapt this template to create your project factsheet.



2.4

Contacts database for dissemination

To ensure that the project target groups are reached and informed of the project activities, the project partners should create a database of national contacts to be enriched and updated during the project. We advise making a shared list of international stakeholders. Use these templates to create your contact lists.



2.5

Social media publishing calendar

Creating a social media calendar can help the partnership maintain an overview of upcoming social media posts and encourage collaboration in creating content (you can upload it on a sharing and collaboration platform such as Google Drive). This calendar can serve as a monitoring tool and be helpful when reporting the dissemination activities that have taken place on the project's social channels.



2.6

Guidelines for the organisation of events

Public events are opportunities to show the project results and interact with target groups and stakeholders, whether offline or online. However, their organisation requires time, careful preparation, and documentation for project reporting purposes. This Guide provides step-by-step information on how to organise and document events effectively.



2.7

Evaluation questionnaire for an event

Event evaluation questionnaires are essential for gathering in-depth and valuable information from participants regarding the satisfaction and usefulness of the event and the content/results presented. In this Guide, we propose a standard questionnaire adaptable to the event's objectives and which also has an online version (e.g., using Google Forms).



2.8

Certificate of Attendance

A certificate of attendance is a document prepared, signed and issued by a hosting organisation to the participants of a training, workshop, seminar, or meeting. It is an official document that proves the actual participation of the person in the event. The certificate must contain standard information, including the name of the hosting organisation, event name, date, and so on. A template can help you prepare your certificate without forgetting important details.



2.9

Event Report

This template is a simple support tool for writing project event reports. The partnership can share the document to have a common structure for multiple events. It also provides a list of evidence you must collect to prove that your event occurred. We suggest using the report along with tool 2.6 Evaluation questionnaire for an event.



2.10

Dissemination reporting tool

As part of the reporting obligations, partners should document the dissemination activities carried out during the project to demonstrate that the dissemination objectives have been met. A document to note these activities could be shared (e.g., using Google Forms) and kept updated since the beginning of the project. We suggest taking note of such activities as soon as you complete them since reconstructing your dissemination strategy after months can be time-consuming.



2.11

How to calculate daily rates?

The daily rate calculation helps provide a basis for writing a project proposal based either on real costs or on lump sum. In this way, it is possible to enter all personnel costs provided in the payroll and calculate the daily cost according to the work days of the year and respect to any part-time employee.



2.12

Internal sheet for Travel and Subsistence costs

You can use this Excel spreadsheet to record expenses incurred during a business trip. You enter the flights or travel by local means of transport in the travel costs section, while the costs incurred during the journey for food and accommodation should be registered in the Subsistence costs section.



2.13

Timesheet

This tool can note the working days of each person allocated within the project to describe the daily tasks performed during the month. In this way, it is possible to keep track of the individual activities carried out and the working hours the staff has devoted to the project.

In the last phase of project management, the partnership must finalise all the deliverables (e.g. project outputs submitted to show project progress that can be of various formats). Moreover, it should prepare a content report to send to the granting authority for evaluation and archive all relevant documents. It is essential to store all the data in a safe place accessible to project managers. This toolkit section includes a project closure checklist and a document storage and management guide.

We are NOT providing any specific tool for financial reporting. The Erasmus+ actions covered in this toolkit are based on the lump sum funding model recently introduced to simplify administrative tasks for the beneficiaries and the granting authority. This model focuses solely on implementation reporting and correctly implementing the work plan and activities. These are new procedures for Erasmus+ beneficiaries for which the EACEA is developing new and detailed guides. For this reason, we cannot propose standard strategies or tools in this toolkit. Each organisation will have to find its financial reporting model complying with record-keeping obligations outside the grant agreement, for instance, under national law or internal procedures.



3.1

Project closure checklist

This simple checklist applies to the final phase of the project life cycle, when documents, data and project deliverables need to be completed, signed and archived. What documents to store in an online folder? Which ones should you have a hard copy of? Follow this checklist to avoid forgetting something and be ready for a possible audit.



3.2

Documents management and storage

Many organisations often overlook the correct management and conservation of project documentation, which may lead to problems in transmitting information and knowledge between members of the same organisation and different offices. Properly managing project documents and storage will facilitate the sharing of information and their access in the future.

In **folder 4** of this Toolkit, official guides and reference documents produced by EACEA have been collected to support the beneficiaries of Erasmus projects in their preparation and management.

Decentralised Actions:

- > Handbook on the lump sum funding model for KA2 v. January 2023
- > Application form- Cooperation partnerships in higher education 2023

Centralised Actions:

- > How to manage your lump sum grants v.1.0 15-10-2022
- > Application form Standard Budget-based + LS Type II v.2 01-06-2022
- > Mono/Multi-beneficiary Model Grant Agreement V1.0 October 01st 2022
- > Detailed budget table (ERASMUS LSII) v3.6_002, of 14/11/2022

All types of Actions:

- > Call for proposals 2023
- > How to communicate your project- Publications Office of the EU

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<https://ec.europa.eu/social/main.jsp?catId=1223>
- > Horizon Europe website
https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe_en

Communication and Dissemination:

- > Visual identity rules for EACEA beneficiaries
https://www.eacea.ec.europa.eu/about-eacea/visual-identity/visual-identity-programming-period-2021-2027/european-flag-emblem-and-multilingual-disclaimer_en
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