How to Write a Convincing Project Application

…with a focus on Erasmus+

A-Z of Concepts and Considerations

Vilamoura, 9-11 November 2017

orientra

Background and Goals

Once upon a time…

… deep in the heart of Brussels
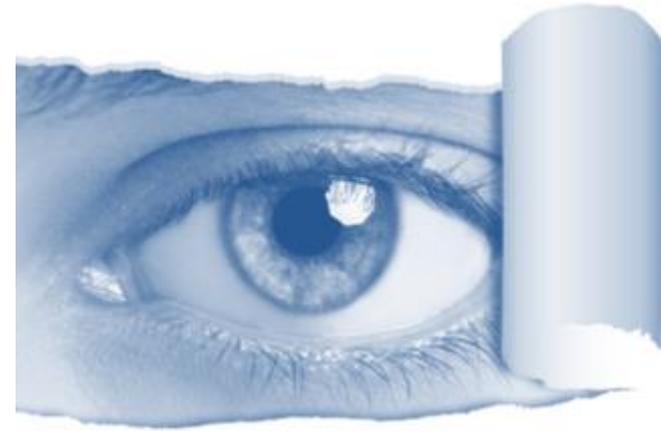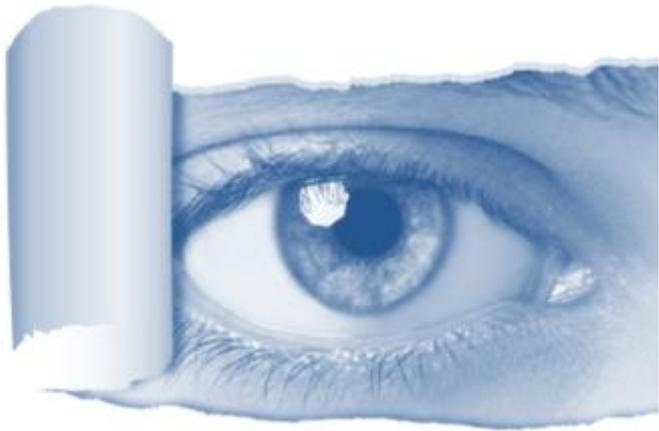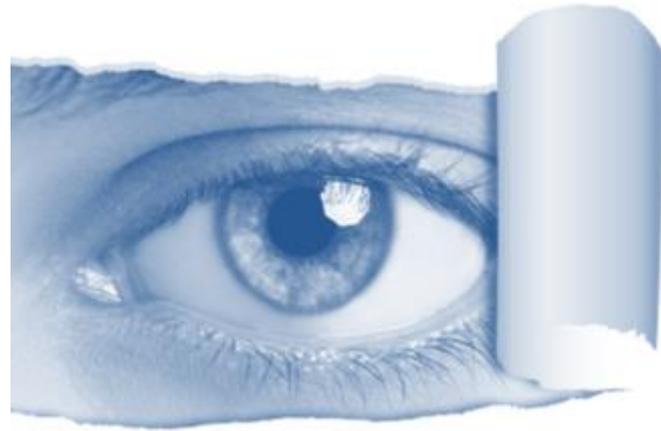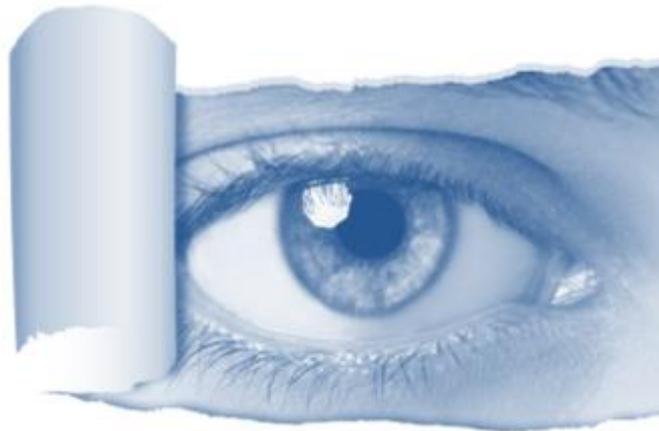
Erasmus+ Perspective

… for developments across all fields of E+T
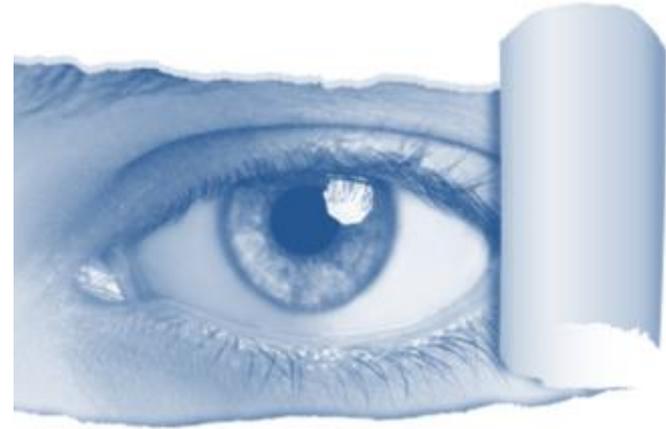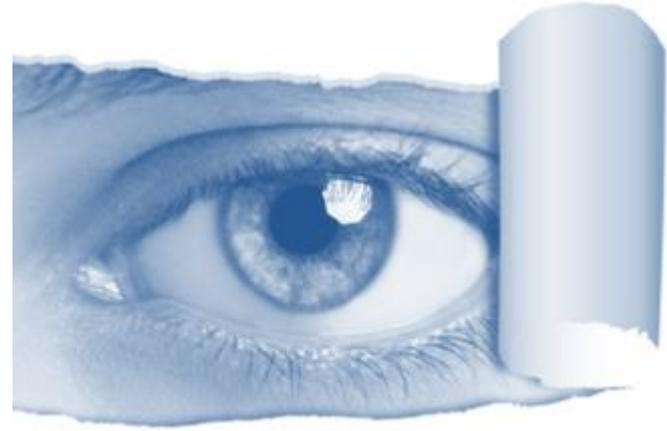
Journey from A to Z

Whistle-stop tour

1. Relevance and Innovation

(state of the)
Art

… or state-of-play

Often lightly touched upon or lacking in detail!

Insight needed at the point of application.

Confirm SOTA in partner countries and more widely.

Cite sources for credibility.

Include numbers and statistics to confirm trends, gaps or deficits.

Needs

People Need Change...
The World Needs Love

Avoid Declarative Statements

Ensure Needs are Credible

Know your Limits

Confirm your Capacities

Focus on Specific Audiences

Quantify the Need

Refer to Needs Analysis

Innovation

How much is actually new?
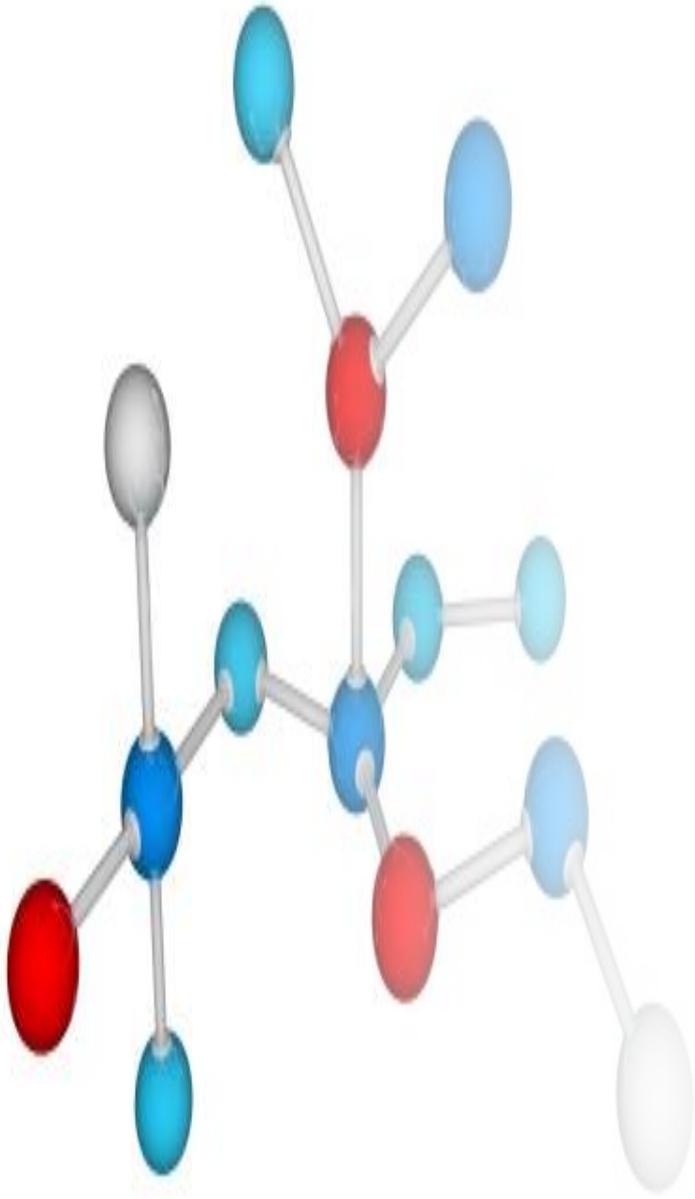
It is your responsibility to provide a compelling argument for innovation!

Consider that which has already been funded in your field or discipline: review past-funded and ongoing projects/networks.

Consider how novel the concept is in the targeted field/discipline: expect at least one field-specific expert to review your proposal.

Ensure arguments for innovation are given for ALL partner bodies and ALL partner countries.

Facts and figures

How much do we actually know...

...active participation

A B C

According to official data for 2017, what does Portugal represent as a % of the EU28 population?

A. 2% ✓

B. 3%

C. 4%

According to official data for 2016, which of these is the unemployment rate for the EU28 (as a % of the active population)?

A.   8.6% ✓

B.   9.6%

C.   10.6%

Official data for 2016 confirms a higher education achievement rate of 39.1% among 30-34 year-olds for the EU28… but how do MALES and FEMALES compare?

A. Females = Higher Rate ✔

B. Males = Higher Rate

C. Same/Similar Rates

It's not rocket science (unless it's actually rocket science)… make use of official and credible data sources and cite these.

Highlight trends, gaps and areas for development and improvement.

Use data to build an evidence base… across all partner countries

Erasmus+

Know the Erasmus+ Programme

…consider programme goals and priorities as well as higher-level frameworks (e.g. Europe 2020, ET2020)

Policies, Frameworks and Erasmus+

Europe 2020
…a strategy for smarter, more sustainable and more inclusive growth

- 2020 TARGET ➜ 3% investment in **Research and Development**
- 2020 TARGET ➜ 75% **Employment** among 20-64 year olds
- 2020 TARGET ➜ Reduction of **Early School Leaving** to < 10%
- 2020 TARGET ➜ 40% completion of **Tertiary Education** (30-34 yr olds)
- 2020 TARGET ➜ 20 million fewer people at risk of **Poverty**

ET 2020
…a new strategic framework for European cooperation in education and training

- STRATEGIC OBJECTIVE ➜ Making **Lifelong Learning and Mobility** a Reality
- STRATEGIC OBJECTIVE ➜ Improving **Quality and Efficiency** in Education and Training
- STRATEGIC OBJECTIVE ➜ Promoting **Equity, Social Cohesion and Active Citizenship**
- STRATEGIC OBJECTIVE ➜ Enhancing **Creativity and Innovation (including Entrepreneurship)** at all levels of Education and Training

Erasmus+
…a single programme for education, training, youth and sport that <u>aims to contribute to the achievement of</u>:

- EUROPE 2020 AND ET2020 OBJECTIVES AND TARGETS
- FIELD-SPECIFIC GOALS AND TARGETS (E.G. HE MODERNISATION; RIGA 2015)
- SUSTAINABLE DEVELOPMENT IN PARTNER (NON-PROGRAMME) COUNTRIES
- OBJECTIVES OF RENEWED FRAMEWORK FOR YOUTH
- OBJECTIVES FOR DEVELOPING A EUROPEAN DIMENSION IN SPORT
- PROMOTION OF EUROPEAN VALUES (ARTICLE 2 OF TREATY ON EU)

Key action

Get to know the action and sub-action.

Remember that rules on participation and financing levels can differ.

Note that application and contract management (and sources of support) might be either centralised or decentralised.

(avoid)

Buzzwords
and Acronyms

BCN

CPH

FRA

CIA

FUN

FUNAFUTI (TUVALU)

A bit of fun, but what about some terms from the worlds of **Education, Training and Erasmus+**

EHEA

ECHE

PIC

ECTS

QF-EHEA

EQF — European Qualifications Framework

CEC — Cadre Européen des Certifications

EQR — Europäischen Qualifikationsrahmens

2. Quality of Project Design and Implementation

Storytelling

Hunger Tale (v1.0)

On **Wednesday**, we will make soup and we will feed the **poor and the homeless**. This will stop people in **Scotland** from being hungry.

Hunger Tale (v2.0)

On **Wednesday** (the **annual** "Stop Food Poverty" day), we will gather ingredients from local supermarkets in **Glasgow** and we will make **1000 bowls of soup**. This will send a message to local citizens about the need to **combat food poverty** and will, at least for a short while, stop some people from feeling hungry.

Hunger Tale (v3.0)

Responding to a call for European cities to participate in a European campaign entitled "Stop Food Poverty" (www.stopoverty.eu), six partner organisations - representing the vocational training and retail sectors in Glasgow - will come together in a day of action, on Wednesday 1 December 2016, targeting "increased awareness" of the issue of food poverty and "promoting local initiatives" such as the Winter Soup Kitchen. The proposed Glasgow initiative is only one of a series of actions that builds on the successes of the 2015 campaign and expects to see partners from across Europe contributing to similar anti-food poverty actions and initiatives. In the short-term, this expects to address food poverty issues that affect close to 5% of the Glasgow population (ONS, 2014). In the long term, it is expected that increased awareness of this issue will prompt greater involvement from both government and society.

GOALS, OBJECTIVES, PRIORITIES, PROBLEM, RESPONSE, ACTORS, REACH.

Even more could be said but there are limits on the size of written texts!

Timeline and schedule

Consider your project (or potential project) on a Timeline

1. PAST	2. PRESENT
What is the root of the proposed project, action or initiative (identified problem, confirmed need for change/development)? **Is there a credible (and accessible) needs analysis report?** **What actions or activities have already taken place?**	**What are the current priorities at regional, national, European, sectoral or institutional level (e.g. relate to the Internationalisation Strategy or European Development Plan)?** **What is currently happening (i.e. state-of-the-art or state-of-play today in ALL partner institutions and countries)?**

Consider your project (or potential project) on a Timeline

3. IMMEDIATE FUTURE	4. LONG-TERM FUTURE
What solution(s) do you propose to implement ... When? Where? Why do this transnationally? Who will you target for involvement? Why did you select these partners and target groups? Is the planned solution relevant for all partners?	What do you target in terms of measurable or lasting change and improvement? How will this impact on existing education and training landscapes, programmes, curricula or course delivery in the different partner countries? Are there plans to extend results to other networks, institutions or countries

(mind the) Gaps

THE STORY WITH GAPS

Yesterday, when I arrived at the airport, I saw

....

The first thing that I said was

....

I remember it well because

....

Next time, I would probably

....

THE STORY WITHOUT GAPS

Yesterday, when I arrived at the airport, I saw
THE SUN
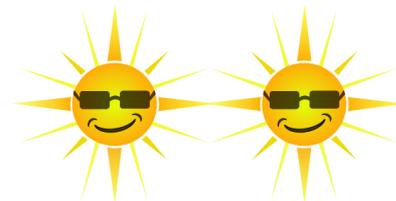
The first thing that I said was
WHERE ARE MY SUNGLASSES

I remember it well because
I DON'T OFTEN SEE THE SUN IN NOVEMBER

Next time, I would probably
BRING MY SUN TAN LOTION

Methodology

Define and describe methods and principles that will be adopted ensuring these reflect institutional and staff capacities and are suited to the targeted actions.

Justify the selection of methods or approaches.

Where opting to await partner agreement, provide one or more examples or options that might be considered.

Workplan

Having already presented goals, targets and expected solutions, it is important to take the reader (assessor) beyond the vision… confirming a plan of action through which **successful and quality-assured** project delivery can be achieved.

The reader needs to be able to **visualise project delivery…** aligning proposed activities with broader project goals and objectives… it is your job to facilitate this… **to make that link!**

Use **templates** where these exist.

Quality assurance

Confirm Quality Assurance goals and objectives (why).

Decide whether your focus is on delivery or outputs and confirms the actors that will be involved (what, who).

Present mechanisms, indicators and timing (how, when).

Ensure common understanding: terms might be similar yet can mean different things to different people.

Validation

Ensure common understanding: as with QA, validation is often **interpreted differently** by different audiences.

In **mobility**, validation is can mean the process of reviewing and accepting assessment results.

In **development**, this can involve seeking input from different stakeholder audiences to validating the worth and value of products and outputs.

Be **realistic** – know what you can achieve during the project lifetime.

User involvement

Users come in all shapes and sizes and can include:

- policy and decision makers
- teachers, tutors and trainers
- students and learners
- managers and staff (employees)
- professional / sectoral bodies
- public authorities
- companies / entrepreneurs
- awarding bodies

… among others

When presenting your story, confirm which users you will involve, when, how many and with what purpose!

Recognition

Wherever there learning or skills development involved, it is important to consider mechanisms for assessment, verification and recognition.

Whether targeting staff or student audiences, describe plans for learning recognition.

Consider what can actually be achieved, be realistic and make use of existing European tools and frameworks (e.g. ECTS, EQF-NQF).

3. Quality of Project Team

Partner institutions

STAND UP… SIT DOWN

When a question is asked, if the answer (in your head) is NO then you must sit down… and stay down!

EVERYBODY PLEASE STAND UP

Practice Question

Do you speak Spanish?

¿Hablas español?

Questions:

✪ **Have you flown on a PLANE in the last week?**

✪ **Are you a COFFEE drinker (i.e. prefer this)?**

✪ **Have you ever sang in the SHOWER?**

✪ **Do you speak more than 2 languages (even if this is just a few words)?**

✪ **Have you worked professionally for MORE THAN 20 YEARS (does not have to be in the same job, same industry or same institution)?**

✪ **Have you ever visited SCOTLAND?**

✪ **Do you BELIEVE IN ALIENS?**

When building a partnership there is a tendency to include those institutions (or individuals) that you have **worked with successfully** in the past.

Whilst it might seem like a good idea to include friendly and competent individuals with whom you have already built trust, there is a need to ensure that partners are **appropriate to** each new project idea or initiative… also bringing forth the **required skills set.**

In building a project team, it is important to consider:

✪ **INSTITUTIONS** that have **goals and objectives which are easily aligned** with the goals and priorities of your project;

✪ **INDIVIDUALS** with **confirmed capacity in the discipline, sector or action** that is being targeted for development… with limited reliance on externalisation;

✪ **INSTITUTIONS** with **direct access to** targeted user or stakeholder audiences;

✪ **INDIVIDUALS** that are **committed (but not over-committed)**

✪ the added-value of **INSTITUTIONS** representing **non-programme countries.**

Yes we can

The Rogues Gallery

A difficult partner can inhibit project delivery…
a balanced partnership is important

MR EUROPE

- Pro-Europe (or at least pro-European projects)
- Talks of "significant experience" in European projects across multiple funding programmes - always citing past experience and suggesting "they know best"
- Always ensures participation is financially viable
- Dedicates 80-120% of working life to European projects (not always with enough time for each project when needed)

FRAU GREEN

- New to post or new to European projects
- Usually with only a few years of work experience
- Extremely enthusiastic and willing
- Inexperienced in European projects and not fully aware of what participation requires
- Not always aware of how to obtain institutional (or local, regional, national) support for the project
- Often requires greater hands-on coaching and support

The Rogues Gallery

A few examples of CHALLENGING PARTNERS based on my own experiences.

SEÑOR INVISIBLE

- Joins the partnership through non-personal contact (not personally known, never actually met)
- Regularly fails to attend partner meetings or sends somebody else on their behalf (often more junior)
- Regularly fails to meet agreed project deadlines
- Regularly fails to produce expected results
- Impossible to contact (telephone, e-mail, VOIP)

MADAME GREEDY

- Always trying to negotiate an increased role (or increased project funding)
- Wants maximum funds for minimum activity
- Requires funds immediately and always in advance
- Uses project budget to contribute to staff and operational costs - often with higher costs than others
- Constantly refers to the minimal financing that they are getting from the project

Joint action

Share the workload - even during project preparation - convincing proposals rely on partners to:

- confirm national and institutional priorities relevant to the targeted action;

- provide data / statistics to evidence needs;

- describe their own institution (user and stakeholder groups, development goals);

- list participating staff and confirm the required knowledge, skills and capacities;

- list past-funded projects and initiatives;

- provide a named contact person that will be available "throughout" project preparation.

It's the closest I could get to X and **eXchange** is at the heart of the Erasmus+ programme.

A useful reminder of the potential brought forth by the programme… for **physical eXchange** (staff and students) but also for the **eXchange of knowledge**… a vital part of any transnational collaboration and one that should not be undervalued.

These aspects can also help to **sell the project** internally.

Harmony

Harmony among partners is an obvious goal… but what happens when there is disharmony, disaccord or significant delay (in delivery)?

It is important to have in place, from the outset, strategies for **risk management** and for **conflict resolution**.

In some cases, this will be judged as a part of the overall management plan.

4. Impact and Dissemination

Change and improvement

Set clear **goals for change, impact and improvement**.

Consider **actions** that will enable this to be **measured** as well as their timing (i.e. before, during and after.

Refer to **indicators and targets** (quantitative and qualitative targets) and to **specific audiences**: for example, you might already know how many learners or teachers you will involve but how will you measure improved performance (learners), improved capacity (teachers) and output quality?

(leaving a)

Legacy

Describe what your project will leave behind… this could be tangible (e.g. curricula, online platform materials) or intangible (success stories, lessons learned, increased knowledge and capacity).

Confirm ambitions for updating and maintenance as well as plans for financing this.

Dissemination

MEMORY TEST

A quick exercise for which **I need three volunteers** whose memory will be tested.

Remaining members of the group are passive observers (no calling out).

TEST 1

EASY

Erasmus+

Art (state-of-the)

Storytelling

Yes We Can

SMART

Storytelling

Methodology

Art (state-of-the)

Recognition

Timeline (and schedule)

TEST 3

SIMPLE

Storytelling

Innovation

Methodology

Partner institutions

Legacy

Erasmus+

Whilst there are clear benefits to having large groups of people hear the same message at a single conference or event… how much of the original message is retained or relayed further?

To ensure that information is cascaded whilst retaining the depth and quality of the original message, you could:

- consider events, platforms and materials that are complementary, working hand-in-hand;
- target media to specific audiences: Facebook is not for everybody and a 200-page publication might not get read by busy policy-makers;
- consider local languages: even if your partners speak excellent English, wider dissemination audiences might not;
- agree on common strategies for dissemination and sustainability: a single vision with local interpretation.

Open access

Erasmus+ requires that applicants think beyond the initial funding period, confirming plans for sustainability and providing FREE, OPEN and ONLINE ACCESS to content, materials and platforms produced in funded projects.

Commercialisation is not forbidden but there may be a need to think outside of the box confirming how commercial and open access actions might complement each other: for example, developing taster courses or taster materials.

In technological terms, as well as licensing and attribution, there is a need to also consider: discoverability, accessibility, interoperability (platforms) and adaptability.

One final point…

(avoid the)
Zzz

Keep the reader interested… tell them a **convincing story**!

Stay within **recommended maxima** in the form.

Avoid using a third party project writer as the **passion for change** and improvement is often lost… and assessors will often also recognise this.

Lunch