# Management Manual

A short guide and a gamified tool for the management and monitoring of KA3 Erasmus+ projects

This manual and accompanying gamified tool aim to help organisations to better design, implement, manage and monitor KA3 projects. Targeted mainly at organisations embarking on their first Key Action 3 (KA3) project, this resource strives to simplify and enhance the project management and monitoring process through providing useful information and a game-based approach.

The manual has been developed in the framework of the KA3 project "Game On: Inclusion through Educational Game Design", funded by Erasmus+. By integrating the principles of inclusive game design, this manual and tool seek to offer practical guidance and engaging learning experiences. It is designed to empower organisations with the strategies and insights needed for the successful man- agement and monitoring of their KA3 projects, aligning with the broader goals of fostering creativity, participation, and critical thinking in educational and youth work settings.

# 1. INTRODUCTION

Key Action 3 projects are initiatives funded by the European Union, aimed at supporting policy innovation, cooperation, and reform in education, training, and youth work. These projects are diverse, encompassing a range of activities from research and policy analy- sis to the development of tools and methodologies for better prac- tices. Part of the broader Erasmus+ programme, they are instru- mental in driving innovation and fostering strategic improvements within organisations. The core components of KA3 projects typically include innovation development, policy analysis, stakeholder engagement, and dissemination of results. The objectives are to influence policy, foster cooperation among organisations, and implement best practices in the field.

For entities embarking on their first KA3 project, the journey offers both unique opportunities and challenges. This manual aims to provide a structured approach to managing KA3 projects effective- ly.

Quality project management is the cornerstone of successful KA3 initiatives. It ensures that projects meet their objectives within the constraints of time, budget, and resources while maintaining high standards. Effective management is critical for navigating the com- plexities of these projects, which often involve multiple stakehold- ers and intricate deliverables.

Managing a KA3 project requires adherence to core project man- agement principles while considering the unique aspects of policy reform and innovation. This includes establishing clear objectives aligned with EU policy goals, fostering collaboration among diverse stakeholders, and implementing effective communication strate- gies. It also involves managing resources efficiently to support innovative initiatives in education and training.

The life cycle of a KA3 project involves stages of ideation (aligned with EU policy goals), proposal submission, project implementation (including policy innovation or experimentation), and dissemination of outcomes. Each stage demands specific attention to policy rele- vance, stakeholder involvement, and compliance with EU stand- ards.

This manual presents different key documents and tools for effec- tive management, for monitoring the project activity and also to have control over the financial part. It is designed to empower organisations with practical skills and strategies for managing their projects with efficiency and confidence.

"Quality project management is the cornerstone of successful KA3 initiatives."

# 2. SETTING UP THE PROJECT

The goals and objectives of a KA3 project should align with the broader EU policy agenda. This requires a deep understanding of current policies in education, training, youth, and sport, and how the project can contribute to policy development or reform. Objectives should be specific, measurable, aligned with EU priori- ties, realistic, and time-bound.

The project charter for a KA3 initiative should outline the project's alignment with EU policy objectives, detail the roles of various stakeholders, and describe the expected policy impact. It should also include methodologies for policy experimentation or innova- tion, and plans for disseminating results to relevant stakeholders.

Stakeholder analysis in a KA3 project must encompass EU bodies, national and regional public authorities, educational institutions, and civil society organisations. Engagement strategies should focus on collaboration for policy development, sharing best prac- tices, and contributing to the European policy dialogue.

**Explore here if the goals of your project match the goals of**
**Key actions 3: Support to policy development and cooperation.**

# 3. PLANNING THE MANAGEMENT OF YOUR KA3 PROJECT

## Developing a management project plan

To submit a KA3 project, you will need to fill and complete a default template Application, provided by the Commission. As a reference, see here **the model of 2024 applications.**
A comprehensive project plan for a KA3 project should detail the steps necessary to achieve the defined policy-related objectives. This plan must include timelines, milestones, and deliverables that align with the EU's policy agenda. It should also outline the methodolo- gies to be used for policy innovation or experimentation, detail the process of stakeholder engagement, and set out plans for the dissemination and evaluation of results.
There are different tools to help an organisation in this direction. See here:

- GANTT Chart. Gantt charts give you a visual timeline of the steps in your project. **Find here** some templates and **here** an example from the KA3 project Game On.
- Partnership Agreements

## Resource allocation and budgeting

Effective resource allocation and budgeting are vital for the smooth execution of KA3 projects. This involves determining the financial, human, and material resources required and allocating them efficiently. Budgets should account for all phases of the project, from research and development to dissemination and evaluation, ensuring compliance with EU funding guidelines.
KA3 projects have to follow a default budget, already established by the European Com-mission, and also a default Grant agreement.
To better follow the funding guidelines, see here **The good justifyer's handbook.**
Partners of a KA3 project should also follow and agree on a Plan of payments.

## Roles and responsibilities

Key roles in a KA3 project include project coordinators, policy experts, educators, and trainers. The responsibilities extend beyond typical project tasks to include policy analysis, engaging with EU policy frameworks, and collaborating with public authorities and civil society. Effective management of these roles is crucial for the success of the project. To do so, we recommend you to agree and follow a:

- **Project roles division**
- Task division plan. See **here** the Game On project example.

# 4. Implementing, monitoring and controlling KA3 projects

The execution of a KA3 project requires a strategic approach that balances adherence to the project plan with the flexibility to adapt to policy changes or unexpected challenges. This involves regularly monitoring progress, maintaining active engagement with all stakeholders, and ensuring that the project activities are aligned with the broader EU policy objectives. In this direction, we recommend to you to:

**Establish monthly coordination meetings, with visual support and taking minutes of the arguments and agreements that take place on them.**

**Keep track of the different partners through transnational meetings (and reports).**

**Carry out the different WPs reports. See here a template, as an example of the different parts we recommend you to have.**

## Communication plans and monitoring

Effective communication is key to the success of KA3 projects. This includes internal communi- cation among the project team and external communication with stakeholders, policymakers, and the public. Communication plans should detail the channels and frequency of updates, ensuring transparency and keeping all parties informed and engaged.
As an example, see here the **Game On Local communication strategy**.
Don't lose track of what is done. For monitoring the dissemination activities and posts, use a tool like **GameOn dissemination monitoring.**

## Quality assurance and monitoring

Implementing quality assurance processes ensures that KA3 projects meet the expected standards and contribute effectively to policy development and reform. This involves regular monitoring and evaluation of project activities, adherence to EU policy guidelines, and gathering feedback from stakeholders. Quality assurance also includes documenting processes and outcomes, which is essential for the dissemination of results and for informing future policy initiatives.

A Quality Assurance Plan (QAP) provides a guideline for monitoring the progress and the achievements of a project management and its outcomes/outputs, with a focus on the assur- ance of a quality project implementation. The document provides the structure of governance and management/monitoring of a project. A QAP typically defines roles and responsibilities; monitoring, evaluation, and reporting progress; and documents' production.

See here an example of a **Game On - Quality Assurance Plan.**

# 4. Implementing, monitoring and controlling KA3 projects

This document is closely linked to the Monitoring Assessment System (MAS), which specifies the aims of the different parts of the project, the outcomes, the quality indicators, the sources of verification, the degree of achievement and proposals for improvement.

Effective tracking of progress is essential in KA3 projects to ensure they stay aligned with their objectives and EU policy goals. This involves setting up regular milestones and check-ins to monitor the advancement of the project against the timeline. Utilisation of project management tools and software can aid in providing a clear view of progress and help in identifying any delays or deviations early. In this sense, the European Commission will require you to present not only a Final Report (default template provided by the Commission), but also an Intermediate Report (with also a default template). Those include a project result platform (also, a default model from the Commission). The Commission will give feedback to your project after reading the Intermediate Report, with a score and highlighting the strengths and weaknesses at that moment. To prevent a low-score, which will indicate a poor performance of the project, different assessments can be done all along the project. Usually, 3 MAS assessments are done: initial, intermediate and final.

As an example, see the **Game On - Monitoring Assessment System - Final assessment**.

With the MAS and the QAP, it is also worth it to invest energy and time on evaluating the project to keep it on track from the perspective of those two documents. A QAP report can be done by one partner or outsiders from the project, which will give a better perspective from the advances. As an example, see here the **1st QAP Report of Game On project**. To measure the performance of a KA3 project, employ both quantitative and qualitative methods. Quantitative measures might include the number of policy recommendations developed, the reach of dissemination activities, or the percentage of project milestones achieved on time. Qualitatively, evaluate the impact of the project on policy development, stakeholder engagement, and innovations in educational and training practices. These evaluations should align with the predefined objectives in the project plan.

## Financial monitoring

To monitor the financial part of the project, keep updated the financial reports of the con- sortium partners and follow the plan of payments. See here a financial report:

Game On - Partner: Idealúdica - Final financial report.

# 5. Closing the Project

## Finalising project deliverables and final reporting

As the project nears completion, focus on finalising all deliverables, ensuring they meet the established standards and objectives. This includes final policy recommendations, reports, and any materials developed for dissemination. Ensure that all docu- mentation is complete and that the project outcomes align with the original goals as well as EU policy expectations.

Celebrate a Project Evaluation Meeting. This evaluation should review the project's achievements against its objectives, the effectiveness of the implementation process, and the impact on policy reform. Gathering feedback from all stakeholders and participants is also important for a comprehensive evaluation.

Then, fill the Final Report (default template provided by the Commission) and the Project Result Platform (also, a default template).

## Lessons learned and knowledge transfer

Documenting lessons learned from the project is vital for future policy development initiatives. Analyse both successes and chal- lenges to provide insights that can guide future projects. Dissem- inating these lessons within your organisation and to the wider EU policy community can contribute significantly to the field of edu- cation, training, and youth policy. Additionally, consider how the project's outcomes can be scaled or adapted for broader applica- tion, enhancing the impact of your work on the EU's policy land- scape.

# 6. Gamification in Project Management

Gamification involves the integration of game elements and principles into non-game contexts, such as project management. This approach uses elements like points, badges, leaderboards, and challenges to motivate and enhance user engagement. In the context of project management, gamification can help to transform mundane tasks into engaging activities, fostering a more dynamic and collaborative work environment.

It increases engagement and motivation among team members, fosters a spirit of competition and collaboration, and enhances learning and retention of project management principles. Additionally, gamification can lead to improved project performance, as it often results in increased productivity, better time management, and more effective problem-solving.

So, let's go for it! The next grid aims to help all partners of a KA3 project in managing the project once it has started, having the project information updated and keeping it on track.
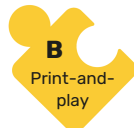
# Instructions

**?** **The Project Progress Tracker gamified tool is designed to help tracking progress, evaluate performance and facilitate the monitoring and evaluation of KA3 projects while adding an element of engagement and competition among partners. By completing the monthly self-evaluation, partners will obtain points that will advance them on the game board.**

## Materials needed

This is a gamified print-and play tool, where each partner needs those documents:

| A Print-and-play | B Print-and-play | C Print-and-play | D Print-and-play | E Print-and-play |
|---|---|---|---|---|
| Monthly self-evaluation of each partner | Six-month progress bars per partner | Consortium summary of punctuation | Consortium board table | Haven't you started the project yet?* |

**1** **Setup:**
- For each partner, print out (or send them) the monthly self-evaluation document (Document A) and the semester tracking document (Document B).
- Place the game board in a visible and accessible location (it can be online) where all team members can access it and see it.

**2** **Monthly Self-Evaluation:**
- At the end of each month, all partners should individually fill out Document A, evaluating their own performance and their progress on the project.
- Partners should be honest and reflective while filling out the self-evaluation, providing accurate assessments of their work.

**3** **Scoring:**
- Each criterion in Document A has assigned a point value based on its importance and impact on the project.
- Partners will receive points for each criterion based on their self-evaluation.
- The total points obtained by each partner will be recorded for that month.

**4** **Advancing on the Game Board:**
- Using the points obtained from the monthly self-evaluation, partners will advance their tokens on the game board.
- Partners will move their markers forward on the game board based on the total points they have accumulated all over the project. To help them track those points, there are documents B and C.
- Print or send one document B to each partner every semester, where they will visually reflect on their progress and be aware if they are failing to ensure good project quality.

**5** **Repeat Monthly:**
- Repeat steps 2-4 at the end of each month throughout the duration of the project.
- Encourage consistent participation and active engagement from all team members to ensure accurate evaluations and fair gameplay.

**End of the game:**
- The partner to reach the furthest square at the end of the project wins the game.

*This gamified tool has been designed for projects that are already taking place or about to start. If you are thinking to start a new project and you have doubts if you are ready for it, then go to the document "Print-and-play E".
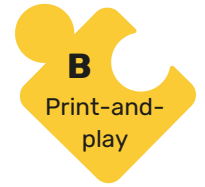
**PARTNER:**

**_____**

**YEAR: _____**

**MONTH: _____**

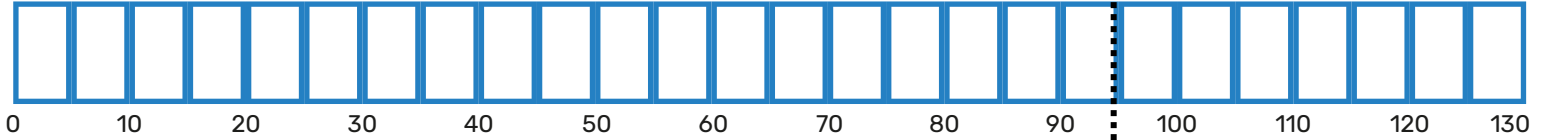| EACH MONTH, EVALUATE YOURSELF!<br>**Implementing, Monitoring, and Controlling** | Monthly possible points | Points obtained |
|---|---|---|
| Conduct monthly coordination meetings with minute-taking with all partners. | **10** | |
| Conduct transnational meetings and reports to track partner involvement. | **5** | |
| Monitor dissemination activities and posts a tool. | **5** | |
| Monitor communication activities to track effectiveness | **5** | |
| Advance on the project deliverables including policy recommendations, reports, and dissemination materials. | **0-40 (evaluate yourself)** | |
| When finishing a Work Package (WP), celebrate an evaluation meeting and produce its report. | **10** | |
| Implement quality assurance processes to meet expected standards and EU policy guidelines. | **10** | |
| Monitor project activities, adherence to guidelines | **10** | |
| Gather stakeholder feedback from the project actions, activities and outputs. | **10** | |
| Keep on day the financial part of the project, the financial reports and adhere to the Plan of payments. | **0-20 (evaluate yourself)** | |
| Ensure compliance with EU funding guidelines throughout the project lifecycle. | **5** | |
| **TOTAL POINTS OF THE MONTH (out of 130)** | | **/130** |
| **Every 6 months:** | | |
| Regularly track progress against milestones using project management tools. | **0-20 (evaluate yourself)** | |
| Utilise a Quality Assurance Plan (QAP) and Monitoring Assessment System (MAS). | **0-30 (evaluate yourself)** | |
| **TOTAL POINTS (out of 50)** | | **/50** |

**A**
Print-and-play

# Partner progress bar of a project semester

Partner: _____

Period: __/____ - __/____

## Points on month 1: ___

| | | | | | | | | | | | | |
0   10   20   30   40   50   60   70   80   90   100   110   120   130

## Points on month 2: ___

0   10   20   30   40   50   60   70   80   90   100   110   120   130

## Points on month 3: ___

0   10   20   30   40   50   60   70   80   90   100   110   120   130

## Points on month 4: ___

0   10   20   30   40   50   60   70   80   90   100   110   120   130

## Points on month 5: ___

0   10   20   30   40   50   60   70   80   90   100   110   120   130

## Points on month 6: ___

0   10   20   30   40   50   60   70   80   90   100   110   120   130   140   150   160   170   180
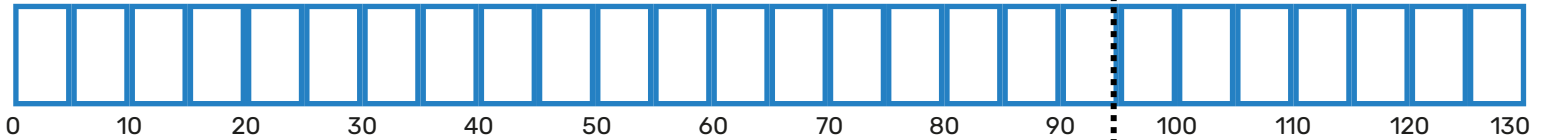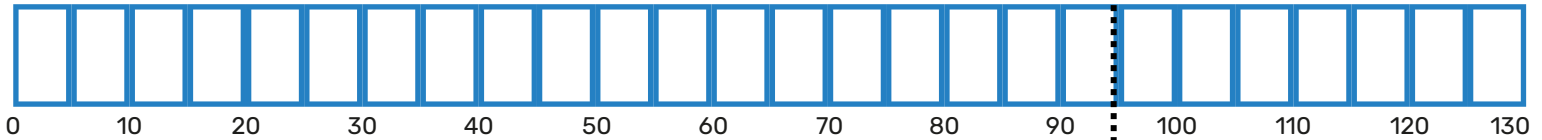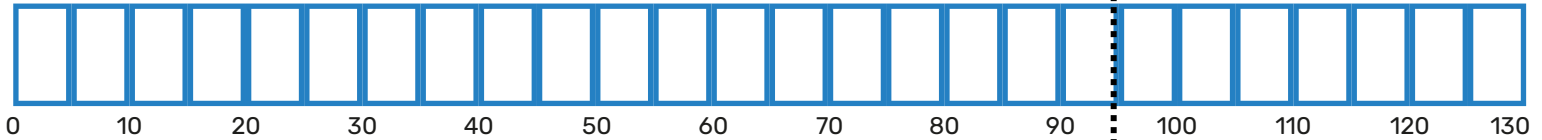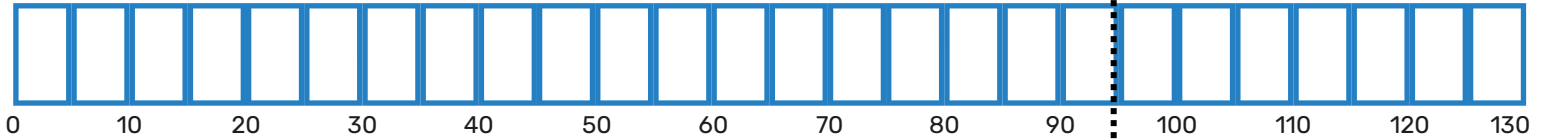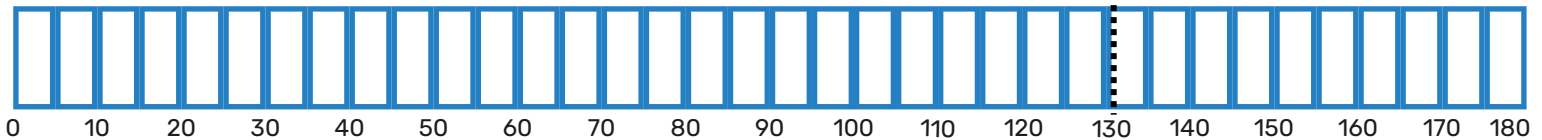
You should obtain **at least** this punctuation to ensure good project management

| PARTNERS RACE FOR AN EFFICENT MANAGEMENT OF THE PROJECT | Points till the moment |
|---|---|
| Partner a: | |
| Partner b: | |
| Partner c: | |
| Partner d: | |
| Partner e: | |
| Partner f: | |

## TOLKENS FOR EACH PARTNER:

**a** **b** **c** **d** **e** **f**

**START**

| 0-100 | 100-200 | 200-300 | 300-400 | 400-500 | 500-600 |

| 600-700 |

| 1,4K – 1,5K | 1,3K – 1,4K | 1,2 K – 1,3K | 1,1K – 1,2 K | 1,0K – 1,1K | 900-1,0K | 800-900 | 700-800 |

**If you did everything well, you should be here on the 1st year**

| 1,5K – 1,6K |

| 1,6K – 1,7K | 1,7K – 1,8K | 1,8K – 1,9K | 1,9K – 2K | 2K – 2,1 K | 2,1K – 2,2K | 2,2K – 2,3K | 2,3K – 2,4K |

**If you did everything well, you should be here on the 2nd year**

| 2,4K – 2,5K |

| 3,2K – 3,3K | 3,1K – 3,2K | 3K – 3,1K | 2,9K – 3K | 2,8K – 2,9K | 2,7K – 2,8K | 2,6K – 2,7K | 2,5K – 2,6K |

| 3,3K – 3,4K |

| 3,4K – 3,5K | 3,5K – 3,6K | 3,6K – 3,7K | 3,7K – 3,8K | 3,8K – 3,9K | 3,9K – 4K | 4K – 4,1K | 4,1K – 4,2K |

| 4,2K – 4,3K |

**If you did everything well, you should be here on the 3rd year**

**The end**

| 4,9K – 5K | 4,8K – 4,9K | 4,7K – 4,8K | 4,6K – 4,7K | 4,5K – 4,6K | 4,4K – 4,5K | 4,3K – 4,4K |

# Haven't you started the project yet?

**70 points**

**However, if your project haven't started yet, first obtain a minimum of 70 points from this list to initiate the big game of a KA3 project, proving that you are develop- ing or you already have a proper management project plan:**
**There are different tools to help an organisation in this direction. See here:**

**5 pts** — Review EU policy objectives. Understand the current policies in education, training, youth, and sport at the EU level, and identify how your project can contribute to policy development or reform.

**10 pts** — Define clear, measurable objectives for your project that align with EU priorities, ensuring they are realistic and time-bound.

**5 pts** — Create a project charter. Outline the project's alignment with EU policy objectives, stakeholder roles and analysis, expected policy impact, methodologies for innovation, and dissemination plans in a project charter.

**5 pts** — Form partnerships with relevant organizations, institutions, and stakeholders to leverage expertise, resources, and networks.

**40 pts** — Complete the application:
• Create a comprehensive project plan detailing steps to achieve policy-related objectives.
• Align timelines, milestones, and deliverables with EU policy agenda.
• Outline methodologies for policy innovation/experimentation, stakeholder engagement, dissemination, and evaluation.
• Utilize tools like Gantt charts and partnership agreements.
• Determine financial, human, and material resources needed.
• Allocate resources efficiently according to EU funding guidelines.
• Follow the default budget and Grant agreement provided by the European Commission.
• Develop a detailed budget plan, including funding sources, expenses, and allocations for each activity and work package.
• Establish responsibilities for policy analysis, engagement with EU frameworks, and collaboration with stakeholders.
• Develop a project roles division and task division plan.
• Establish a framework for monitoring progress against objectives and evaluating the impact of the project on policy development and cooperation.

**5 pts** — Create a Plan of payments for partners.

**10 pts** — Define key roles including project coordinators, policy experts, educators, and trainers.

**10 pts** — Develop a comprehensive plan for disseminating project results and outcomes to relevant stakeholders, that could include conferences, workshops, publications, and online platform.

**10 pts** — Establish a communication strategy to keep stakeholders informed about project progress, milestones, and opportunities for engagement.
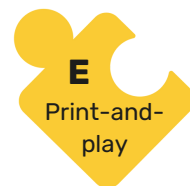
## EXTRA POINTS! To start from a better position:

**10 pts**   Break down the project into manageable work packages, each with its objectives, activities, and deliverables.

**10 pts**   Develop strategies to engage stakeholders in collaboration for policy development, sharing best practices, and contributing to the European policy dialogue.

**20 pts**   Identify potential risks and challenges that may arise during the project implementation and develop mitigation strategies.

**10 pts**   Develop strategies to ensure the sustainability of project outcomes beyond the project's duration, including institutionalization of practices and integration into existing policy frameworks.
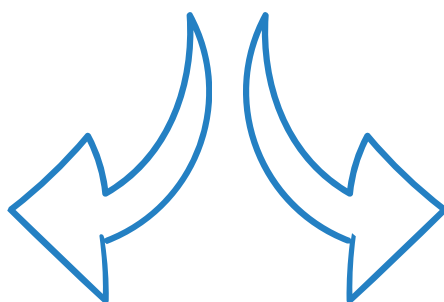
**10 pts**   Ensure compliance with ethical standards and regulations in all project activities, particularly concerning data protection and privacy.

**TOTAL POINTS: : _____ out of 100 (160 with extra points).**

# READY TO START?

**Remember, you need at least 70 points to start the game!**

## YES! :)

### LET'S PLAY!

## NO! :(

### GO BACK TO THE FIRST STEPS

# 7. Resources and Further Reading

## Recommended Literature

Project Management T-Kit – Council of Europe

How to plan and implement an Erasmus+ project – Finnish National Agency for Education

# 8. Summary of key documents

| Area of management | Document | Notes |
|---|---|---|
| **General management** | Application | |
| | Proposal of project quality improvement | Reformulation for EACEA |
| | GANTT Chart | Project timeline |
| | Project roles division | |
| | Task division | |
| **Monitoring** | QAP (example) | Quality Assurance Plan |
| | MAS (example) | Monitoring Assessment System, the guide for monitoring |
| **Administration & finances** | Budget | Annex of the application |
| | Grant Agreement | Agreement with EACEA |
| | Plan of payments | Agreed plan |
| | The good justifier Handbook | Short guide for administrators |
| **Dissemination** | Communication strategy (example) | |
| | Local communication strategy (example) | |
| | Dissemination monitoring (example) | Collection of achievements and sources of verification |
| **Evaluation & report** | Project progress reports | |
| | WP reports (template) | |
| | QAP Reports (example) | |
| | Project result platform | List of results for EACEA |

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