FROM TIME TO TIME EVERYBODY NEEDS HELP

DREAMS TOO

Loesje

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TOOLBOX

for increasing the quality of project management in Erasmus+ projects

TABLE OF CONTENTS

ABOUT THE PROJECT

The project was born out of the need of less experienced organizations, to increase the quality of project management in Erasmus+ projects, especially in Key Action 1. “From time to time everybody needs help / dreams too” is a Small Scale Partnership between Loesje e.V., GNU Association, Loesje Bitola and Loesje Bulgaria, funded by the German National Agency “Jugend für Europa” in the frame of the Erasmus+ program. The project had the following objectives:

- **To improve the project management of Erasmus+ projects (with a focus on Key Action 1 projects)**
- **To strengthen the cooperation between organisations with different capacities**
- **To create a toolbox that can help newcomers to increase the quality of project management in their Erasmus+ projects**
- **To train 16 project coordinators, trainers, and project writers on tools and methods for quality project management**

The specific objective of the project was:

- **To develop 3 project ideas into applications that will be applied for in the following deadlines in different NAs**

PARTNERS

Loesje Berlin

Loesje Berlin has been active since 2005, fostering creativity and human rights through local and international projects. From creative text-writing workshops in multiple languages to cross-border training courses, we aim to connect people and inspire action.

Loesje Bitola

Loesje Bitola was created in 2018 in North Macedonia. It is an organisation that fosters community development and youth engagement through creativity. We share the values of the Loesje network by combating hate speech and discrimination and fostering freedom of speech, tolerance and solidarity.

GNU International APS

GNU International APS, founded in 2020 in Naples, empowers individuals through education, creativity, and European mobility. We promote human rights, sustainability, and active citizenship while fostering inclusion and intercultural understanding through workshops and cultural exchanges.

Loesje Bulgaria

Loesje Bulgaria was established in 2020 and empowers youth through creative writing workshops and non-formal education, fostering personal and professional growth. As part of the international Loesje network, we promote diversity, freedom of expression and European values while combating hate speech and discrimination.

ACTIVITIES

KICK OFF MEETING IN BERLIN

07-10.12.2023

TRAINING COURSE IN OHRID

18-23.04.2024

MID-TERM MEETING IN NAPOLI

07-09.06.2024

DURATION OF THE PROJECT
18 MONTHS

CREATION OF A TOOLBOX

APRIL 2024 - JUNE 2024

LOCAL ACTIVITIES

APRIL 2024 - JANUARY 2025

FINAL MEETING IN SOFIA

05-08.12.2024

INFORMATION AND TIPS ABOUT BETTER PROJECT MANAGEMENT

Effective project management starts with a clear Project Identification Form (PIF) to get to know the work of your future partners. When searching for partners, align your goals and values to ensure a strong foundation. Building good interpersonal relations helps with risk management, fostering trust and open communication to address challenges. Keep careful finances and bookkeeping to monitor budgets and expenses, ensuring the project stays within financial limits. Lastly, focus on the project's impact, assessing its long-term effects on stakeholders and the community to ensure success and sustainability.

PARTNER IDENTIFICATION FORM (PIF)

The Partner Identification Form (PIF) in Erasmus+ serves as a detailed profile of your organization. The information provided in this form is vital for the project application process. Hence, it's essential to keep the PIF updated and tailored to the specific requirements of the application. In other words, you should clearly understand which Key Action your main proposal focuses on, along with the project objectives and the most relevant information about your organization related to this project.

ERASMUS+ PARTNER IDENTIFICATION FORM

PARTNER ORGANISATION	
OID number	
Full legal name (National Language)	
Full legal name (Latin characters)	
Acronym	
National ID (if applicable)	
Department (if applicable)	
Address (Street and number)	
Country	
Region	
P.O. Box	
Post Code	
CEDEX	
City	
Website	
Email	
Telephone 1	
Telephone 2	
Fax	

ATTENTION!

- Always ensure your PIF form is current. Be truthful and include relevant information regarding your organization, capacity, activities, and the project for which you are seeking partnership.
- Tailor your PIF form to match the Key Action you are applying for, as various formats contain different questions.
- Take the time to read about the project you are applying for and ask questions. This will help you understand how your organization can contribute additional value to the project.

SEARCHING FOR PARTNERS

Erasmus+ soulmate

SOURCE 1: www.salto-youth.net/tools/otlas-partner-finding/

SALTO offers an excellent database of organisations known as OTLAS, where you can discover potential partners for your projects. This platform provides various options, allowing you to explore registered organisations, add your own organisation or informal group, and publish your project while seeking partners.

SOURCE 2: https://erasmus-plus.ec.europa.eu/projects

The Erasmus+ Projects Platform serves as a comprehensive resource for discovering all funded projects across various years and Key Actions. You can utilise the filters to select partners based on country, type of organization, or the name of the organisation.

SOURCE 3: Social media groups for Erasmus+ projects

There are various Facebook, Instagram, and Telegram groups with many followers who share information about their organisations and initiatives. Although these platforms can help you quickly find potential partners, we advise you to approach these with a critical mindset.

PARTICIPANTS – SELECTION AND PREPARATION

Participants involved in various phases of the project play a vital role in its success. In Key Action 1 projects, we select, prepare, and provide necessary follow-up for the participants. The profiles of the participants and the selection process are determined collaboratively by the partners during the development of the project application. It is essential to always adhere to Quality Standards when selecting and preparing participants.

SELECTION OF PARTICIPANTS

The selection process should happen by respecting the following core values:

- TRANSPARENCY: This ensures fairness and inclusivity in the process. The process should be open to all eligible potential participants. Project coordinators should always be prepared to justify their selection procedure (if needed).
- FAIRNESS: There should be no unfair barriers to participation especially for those with fewer opportunities.
- INCLUSIVITY: Providing clear and accessible information about the selection process, as well as ensuring that the application procedures, documents and forms are user-friendly and understandable.

PREPARATION OF PARTICIPANTS

Participants must receive appropriate preparation in terms of practical, cultural and safety aspects. They should be fully aware of what is expected from them before, during and after the activity. Adequate guidance, monitoring and support must be available during all phases of the activities.

Organisations must ensure fair and equal conditions for all participants, including the provision of the support needed to put those facing barriers (such as special learning needs or physical disability) on par with others.

ERASMUS+ QUALITY STANDARDS IN YOUTH

PARTICIPANTS – ALL EQUAL, BUT ALL DIFFERENT

In our projects, we engage with a large number of participants from various backgrounds, each bringing unique personalities and perspectives. Our aim is to unite everyone to collaborate on the project's topic while fostering an atmosphere of respect, inclusion, and tolerance within the group.

1. Objectives

The goal of this workshop is to examine various participant types, gain insights into their behaviours, and discover effective strategies for managing them or resolving any conflicts that may arise within the group.

2. Preparation and materials

Utilise flip-charts to display images or screens for PowerPoint presentations. Identify and create profiles of well-known avatars or characters from movies and TV shows that exhibit traits of complex participants.

3. Step-by-step guide

- Guess the Avatar

1. Display the famous avatar on the screen. Each team takes turns guessing:
   - Who the avatar is
   - Which traits make them a complicated participant
2. Develop mini-scenarios where trainers can share cases where they faced difficult participants.
3. Reflection: After each guess, facilitate a discussion:
   - Personal experiences dealing with similar traits in real-life
   - Discuss how they felt and handled such participants.

- Theater Simulation

1. Set Up: Divide participants into small groups. Assign roles for a scenario, including a facilitator and a complicated participant.
2. Simulation: Groups enact a situation where the facilitator struggles to manage the participant effectively.
3. Reflection: After the activity, facilitate a discussion:
   - Discuss what went wrong or right in the simulation.
   - Identify areas to improve (if there is still time, reenact improvement suggestions)

FINANCES & BOOKKEEPING

In this section, you'll discover valuable guidelines for managing the financial elements of an organization. We will explore project funding, bookkeeping, and budgeting for Erasmus+ projects.

THE FIRST RULE OF BOOK KEEPING:

"Any cent spent needs to be justified with a receipt, invoice or bill."

- If you do not have a receipt for it, there is no proof it was spent. No expense without receipt, invoice or bill, can be included in your NGO or project expenditure. If an individual has covered costs for the project, reimbursement should only occur once the receipt is provided.

THE SECOND RULE OF BOOK KEEPING:

"The book keeping is telling a story, you need to be able to tell it."

You must be able to comprehend your receipts and bookkeeping effectively. The best way to achieve this is by dedicating time to bookkeeping close to when expenditures occur. Organize your receipts and bills according to your bookkeeping system: separate the receipts for cash transactions from those for bank transactions. Maintain your receipts in chronological order and label each one, indicating what it is and the purpose of the expense.

If you engage in numerous activities over a short period, it's beneficial to categorize and label each receipt to clarify their references. Even if you can't complete the actual bookkeeping while in the midst of an activity, this preparatory step is vital. By tackling bookkeeping as soon as possible and avoiding delays, you can save yourself from future headaches and confusion.

Understanding your bookkeeping also means grasping its language. If you have receipts in different languages or alphabets, make sure to label and translate them. Additionally, if your receipts are in currencies other than your own, use currency converters to translate the amounts into your local currency. This should align with the guidelines of your funder. See the "Useful Links" section for currency converter resources.

FINANCES AND BOOK KEEPING OF AN ORGANISATION

To manage finances effectively, it is essential to open a bank account for your organization. In certain instances, you may require a separate bank account for each project.

You should categorize your receipts based on whether they were paid in cash or via bank or credit card. Create two distinct overviews to track these types of expenses. Each overview should detail every transaction, noting the date of each entry. Additionally, ensure that each category in your bookkeeping aligns with a specific cost center, such as one cost center for each project you are overseeing.

- Cash Maintain a cash bookkeeping system
- Bank Utilize bank statements along with personal bookkeeping that includes cost centers

Cash book keeping NGO X 2025										
Stand 01.01.2025:	250,00 €									
							Income cost centres		Expenditure cost centres	
	Tracker	Income	Expenditure	Cost centre	More explanation	Bank to cash	Donation	Project funds	Project 1	Project 2
January		250,00 €								
05.01.2025	270,00 €	20,00 €		Donation			20,00 €			
07.01.2025	235,00 €		35,00 €	Project 1	Food				35,00 €	
08.01.2025	215,00 €		20,00 €	Project 2	Material					20,00 €
09.01.2025	198,00 €		17,00 €	Project 1	Travel costs				17,00 €	
10.01.2025	194,50 €		3,50 €	Project 2	Postal costs					3,50 €
10.01.2025	172,50 €		22,00 €	Project 2	Travel costs					22,00 €
End of the month project monitoring:							20,00 €	0,00 €	52,00 €	45,50 €

Here, you can find an example of bookkeeping with a cash book.

Depending on the amount involved, you may require a more formal invoice, complete with a stamp and/or the provider's signature.

Value Added Tax – VAT

It's essential to determine whether your organization is required to pay Value Added Tax (VAT). If so, for many services, VAT must be added to the base price. Typically, if you pay VAT, you'll need to present your financial records to your tax authority every three months. This can complicate budget calculations, as you'll have to include VAT on top of the initial cost.

- **Eligibility – How can your funding be spent?**

It's essential to assess eligibility – what types of funding can your organization accept? For example, if you are registered as a charity, what implications does this have for your spending practices? Generally, you can determine this by reviewing your organisation's statutes and the laws and regulations of the country in which you are registered.

Typically, funding can be allocated to meet the goals and objectives outlined in your contract with the funder. For Erasmus+, refer to the **Programme Guide** for specific rules and guidelines regarding the use of your project budget.

Additionally, it’s crucial to verify the spending rules for each category. For instance, are you permitted to purchase equipment or materials that will remain with the organization after the project concludes and can be utilised during the project? Can you compensate individuals working on the project, and if so, what are the payment methods? You must adhere to the regulations of both the country where you received the funding and the country where the personnel are engaged.

- **When can your funding be spent?**

Your project comes with an eligibility period during which the allocated funds can be spent. Any receipts or invoices dated outside this timeframe cannot be considered. Therefore, it’s essential to determine when your project commences, as that marks the beginning of eligible expenses, and when it concludes, by which all funds must be utilised. This makes budget monitoring crucial to ensure spending aligns with the specified timeframe.

Typically, projects have a defined duration, such as 12 months. The activity period might be just 7 days, during which you can incur expenses related to your project. Participants are allowed to purchase travel tickets once the project period begins. However, keep in mind that you cannot submit bills for materials or food dated after the project activity and claim them as project-related expenses.

- **What types of funding and income can you obtain?**

For example, if your organization relies solely on charity funding, you may need to maintain specific bookkeeping practices. However, if you start generating income through sales, this might not comply with charity regulations, requiring a different bookkeeping approach. Before accepting any form of funding or income, it's essential to review your organisation's statutes regarding spending, and thoroughly understand the laws and regulations in your country. It may be beneficial to seek guidance from a tax advisor initially or consult with others who run similar organisations to learn from their experiences.

- **Monitoring Your Budget**

It's important to note that budget monitoring differs from bookkeeping. While bookkeeping provides a clear overview of all your income and expenses, budget monitoring involves tracking the expenditures of individual projects. This includes keeping tabs on how much has been spent, in which category or cost centre, and when it occurred.

It’s also worth noting that bookkeeping and budget monitoring don’t have to be handled by the same individual. If you employ an external bookkeeper, someone within your organization should still be responsible for budget monitoring to ensure that spending aligns with your plans.

- **Who is responsible for creating the budget?**

Once the project is approved and funding is secured, a different individual within the organization is assigned to manage the project and allocate the funds. In this situation, both individuals must review the initial plans and proposals to devise a strategy for spending the money appropriately. Additionally, it may be beneficial to schedule several check-in meetings throughout the project's duration to assess spending progress, ensure proper invoice management, and evaluate overall project status.

- **Combining Funding**

Is it possible to combine funding from various sources to enhance your project's potential? Many funders view co-financing favourably, and it can sometimes be a prerequisite for obtaining funding. This means you may need to secure contributions from multiple sources. If you lack a second funding source, consider providing an "in-kind" contribution, which involves allocating existing organisational resources, such as employee work time, to the project budget. This approach allows you to utilise resources that the organization already possesses without requiring additional funding specifically for employee costs related to this project.

However, it's crucial to evaluate the eligibility criteria for each funding source, as they will have different regulations and reporting requirements. Keeping track of these details is essential.

FINANCES IN ERASMUS+ PROJECT

When you initially planned and applied for your project, you created a budget. Was your entire budget approved? If not, where were the reductions made? The contract will clearly outline the total amount of your approved budget, while Annex 1 will detail your project budget. To understand the specifics, refer back to your application and compare it with the approved budget.

Upon project approval, you first receive the approval notice, followed by the contract. This contract outlines all the agreements related to the project and is legally binding. Once both parties have signed the contract, the fund provider has a specified timeframe to transfer the funds. Typically, for most projects, you receive 80% of the total funding upon contract signing, known as pre-financing. You can begin spending on the project activities once the project period starts, regardless of whether the pre-financing has been deposited into your account.

After completing the project, you must submit an evaluation to the fund provider, which includes a final report with a written assessment and a financial overview, along with supporting documents. The timeline for submitting this evaluation is specified in your contract. The fund provider will then have a period to review your evaluation and may request additional information if needed. Once your project evaluation is approved, the fund provider has a designated timeframe to transfer the remaining 20% of the project funds, known as the final payment. If your project is incomplete or if some expenses are deemed ineligible, you may receive a lower amount.

Typically, transferring large sums between budget categories is not permitted. This restriction is usually outlined in the Programme guide and your contract. If you're uncertain, it's best to consult your fund provider before making any changes to an approved budget. Some National Agencies may allow transfers between specific budget categories, but you would need their approval, preferably in written form.

FINANCES IN ERASMUS+ PROJECT

In an Erasmus+ project, many expenses are covered by lump sum budgets. This means that the funding provider does not require a detailed account of how you allocated your project funds; that responsibility lies with you.

However, if you undergo an audit or desk check, you must be prepared to present all receipts and invoices, demonstrating that the money was utilised in accordance with both the funding provider's rules and your national laws and regulations.

To verify that the project took place, you will need to submit documentation during the evaluation phase, such as a signed participant list, an activity timetable, and a Declaration of Honour signed by a legal representative of your organization.

Wishing you the best of luck! Don’t let the finance and bookkeeping aspects of projects intimidate you.

USEFUL LINKS:

Programme Guide Erasmus+ 2025, version 1:
- https://erasmus-plus.ec.europa.eu/document/erasmus-programme-guide-2025-version-1

Currency conversion Erasmus+:
- https://commission.europa.eu/funding-tenders/procedures-guidelines-tenders/information-contractors-and-beneficiaries/exchange-rate-inforeuro_en

Other currency convertors:

- https://bankenverband.de/service/waehrungsrechner/
- https://www.oanda.com/currency-converter/en/?from=MKD&to=EUR&amount=1

Distance calculator Erasmus+:
- https://erasmus-plus.ec.europa.eu/resources-and-tools/distance-calculator

IMPACT

UNDERSTANDING IMPACT

It refers to the beneficial changes and lasting impacts that emerge from project activities, as well as the efforts of individuals, organizations, NGOs, or communities aimed at development, enhancement, or improvement. It involves assessing how these changes contribute to broader societal goals.

WHY DO WE NEED IT ?

Impact measurement plays a crucial role in pinpointing successful strategies and areas that require enhancement. It offers tangible proof of how these initiatives are transforming the lives of young people while contributing to wider societal objectives. Additionally, it underscores the significance and effectiveness of these efforts.

WHERE CAN WE MEASURE IT?

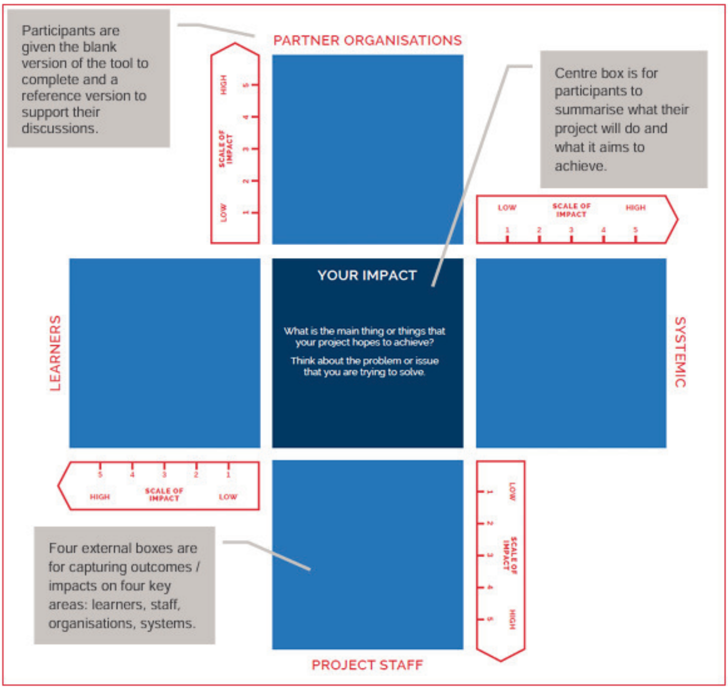
Impact measurement should focus on several key areas:

-Individual Impact
-Organizational Impact
-Community and Societal Impact
-Inclusion and Diversity
-Learning Outcomes
-Project Quality and Implementation
-Long-term Effects

IMPACT+ TOOL

The Impact+ Tool is designed to assist project organizers in considering the potential impact of their project, determining how to measure that impact, and identifying methods for data collection to provide evidence. Measuring impact is not only crucial for assessing your project's success but is often a requirement set by funders.

This tool serves as a foundation for discussions about impact, ultimately leading to the development of an impact assessment plan. Keep in mind that effective impact assessment and evaluation require time and dedication. Following the Impact+ Exercise, it will be necessary to review and refine your impact plans, as well as to design and implement your data collection strategies.



The Impact+ tool is utilized through four distinct steps.

Step 1:

- Begin by discussing the core aims and activities of the project. The group should outline their project and strive to include a brief statement of their goal and intended impacts in the central box.
- This statement should explicitly convey what the project seeks to accomplish, namely, the overall change or impact it aims to create. This will serve as a guiding reference throughout the workshop.

Step 2:

- Move on to discussing the anticipated changes (outcomes and impacts). Participants should share the changes they expect to result from the project, jotting their ideas on sticky notes and placing them in the corresponding side boxes.
- There is no limit to the number of notes that can be added to each box, but participants should be realistic in their suggestions.
- The anticipated changes will likely include a combination of 'outcomes' (short-to-medium term changes) and impacts (long-term changes). At this point, it's not crucial to differentiate clearly between 'outcomes' and 'impacts.'

Step 3:

- Next, discuss the importance of the impact scale. The group should review the notes in each side box, aiming to assess how critical these notes are to achieving the overall intended aim in the central box.
- The purpose of this step is to help the project identify where they can have the greatest impact, guiding them in determining where to allocate their energy and resources. Not all side boxes should receive a rating of five out of five.

Step 4:

- Finally, rate the outcomes and impacts. This step is optional; if only a few notes were generated in step 2, you may choose to skip it. However, if there are numerous notes, this step can help participants filter out those that are least significant to their project.
- While rating each note, participants should consider how relevant the outcome or impact is to the aims stated in the central box and the strength of its connection to their project activities.

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GNU INTERNATIONAL APS

Loesje BULGARIA