COOL
COLLABORATION II

GUIDE

SIMPLIFIED DIGITAL PROJECT MANAGEMENT AND COLLABORATION PROCEDURES

Project:

Cool Collaboration II

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TABLE OF CONTENTS

ABOUT THE PROJECT

Cool Collaboration II is a Cooperation Partnership in the field of youth, co-funded by the Erasmus+ Programme of the European Union. Its aim is to strengthen cooperation between youth organisations and support the digital transformation of youth work.

The project focuses on three main goals:

- to raise the digital skills of youth workers to above basic level,
- to configure and integrate Microsoft 365 and Dynamics 365 into daily youth work, and
- to develop simplified digital project management procedures that young people can use to organise and run activities themselves.

By digitalising youth work and creating accessible tools, the project increases efficiency, quality, and innovation, while also giving young people the chance to build confidence, competences, and active citizenship.

WELCOME TO THE COOL COLLABORATION GUIDE

This guide was created to help young people, youth organisations and NGOs organise Erasmus+ activities in a clear and structured way by using digital tools and simplified procedures. It focuses on the full lifecycle of an activity - from the first preparations until the follow-up afterwards.

Organising an Erasmus+ activity can feel overwhelming at first, with many details and deadlines to consider. With the right structure and tools, the process becomes much easier and more transparent. This guide offers a practical step-by-step roadmap to manage activities, while also helping young people and youth workers develop their digital competences.

This guide reflects the ideas, approach, processes and tools we developed and use. It presents a simplified model designed to support the organisation of activities. The guide does not represent the only possible approach. Depending on the context, specific steps may be adapted, omitted, or restructured. Everyone is encouraged to adjust the procedures according to their needs, resources, and participants, while maintaining the guiding principles of digitalisation, transparency, and inclusion on which this model is based.

HOW TO USE THIS GUIDE

This guide follows the lifecycle of organising an Erasmus+ activity. Each chapter explains what needs to be done in a given phase and how digital tools can support the process. Templates and checklists are included to save time and make sure nothing is forgotten.

LIFECYCLE OF THE ACTIVITY

In this guide, we divide an activity into six phases. Our structure expands the official phases into smaller, practical steps that provide more guidance and support. Our six suggested phases are:

1. Plan – needs analysis, idea creation, early arrangements
2. Participants – selecting and confirming the group
3. Prepare – practical arrangements and coordination
4. Pending mobility – last confirmations before departure
5. Mobility – running the mobility itself
6. Follow-up – evaluation and dissemination after the mobility, final report

The next chapters take you through each stage of an activity, from the first idea to the final follow-up. For every step, you will see what needs to be done, why it matters, and how digital tools can make the work lighter and more transparent.

PLANNING

The planning phase starts several months before the mobility and should be completed at least two months before it begins. It lays the foundation for everything that follows. This is the period when partners agree on the main concept, divide responsibilities, and begin practical preparations. Careful planning helps avoid last-minute problems and ensures that all organisations and young people know what to expect.

KEY STEPS IN THE PLANNING PHASE

1. Prepare the activity idea and summary
Start with a needs analysis: what challenges or interests do the young people have, and how can this activity address them? Write a short summary that includes the topic, objectives, and expected outcomes. Store everything on SharePoint so it is accessible to all partners and can be updated in real time to support cooperation.

Not sure where to begin? Use the first part of our Reporting template from the *Cool Collaboration II Resource Package.*

2. Divide tasks between partners
Every activity should be a shared responsibility. At the start, agree on who does what: logistics, programme design, participant recruitment, finances, communication, etc. Use Microsoft Planner to assign deadlines and responsibilities so that all partners see the progress of each task. This makes the process transparent and fair.

Need help getting started? Download our Tasklist template from *Cool Collaboration II Resource Package.*

3. Set the time of the mobility
Choose dates that work for all partners. Consider national holidays, school breaks, exam periods, and local events that may affect availability or costs. Prices for accommodation and transport may also vary depending on the season. Confirming dates early allows everyone to book travel and accommodation at a reasonable price.

4. Draft the timetable
Before booking the venue, prepare a first draft of the timetable. This helps identify what kind of rooms and equipment will be needed. Sessions should include team building, thematic workshops, cultural exchange, reflection, and evaluation. Store the document on SharePoint in a shared folder so all partners can contribute and follow changes. Excel is a practical tool to structure the timetable clearly.

Want a shortcut? Get the Timetable template from the *Cool Collaboration II Resource Package.*

5. Book accommodation
With the timetable in mind, choose a venue that matches the mobility needs. Consider accessibility, space for sessions, and safe surroundings for young people. Use the CRM system to store contact details of venues and partners, and to track all related communication. Keeping everything logged ensures transparency and that all partners can follow progress.

6. Prepare a draft travel plan

Start planning travel together with partners and group leaders. Coordinated travel ensures safety, especially for minors, and helps groups support each other while travelling. Drafting the plan early also prevents overspending and allows time to look for sustainable travel options. Use the CRM system to keep track of travel details, which will be important in the next phase to keep everything accessible and organised.

7. Create and publish the infopack

Once the main details are confirmed, prepare an infopack with practical information (location, dates, travel arrangements, learning objectives, selection criteria, etc.). Share it publicly on several social media platforms and all partners' websites to ensure transparent access and support diversity in the participant group. You can use Canva for the layout, just make sure to follow Erasmus+ visibility requirements. A consistent visual identity helps recognition and promotion.

For clear design and promotion, check the official Erasmus+ visual guidelines.

SUGGESTED DIGITAL TOOLS FOR PLANNING

- Microsoft Planner – assign and track tasks with deadlines, integrated into Teams
- Microsoft Teams – communication and coordination across partners
- SharePoint – store and co-edit the activity idea, summary, timetable and infopack
- CRM system (PowerApps) – keep records of partners, venues and communication history
- Canva & social media platforms – design and promote the infopack in a professional and consistent way

By the end of this stage, partners should have agreed on the division of tasks, confirmed the dates, booked the accommodation, drafted the timetable and travel plan, and published the infopack. With these elements in place, the foundation of the activity is set, and the focus can move to selecting and confirming participants.

PARTICIPANTS

This phase usually begins two months before the mobility and ends around one month before it. By this point, the basic framework is in place, and the focus shifts to confirming who will take part. A careful and transparent selection process ensures that the activity reaches its target group, respects Erasmus+ values of inclusion, and prepares a balanced team of participants and group leaders.

KEY STEPS IN PARTICIPANTS PHASE

1. Select group leaders

Group leaders play an important role in supporting participants before, during and after the mobility. They should be experienced, responsible, and able to communicate in English. Involving partners in this decision ensures the right people are chosen. Clear criteria helps maintain fairness.

2. Select the participants

The participant selection must follow the Erasmus+ principles of fairness, transparency, and inclusion. When selecting participants, make sure to consider:

- **Eligibility**: age range, residency, and fit with the target group defined in the accreditation or project, and avoid double funding.
- **Needs and relevance:** participants should express how the activity connects to their own needs and interests, and how it can support their personal and learning goals.
- **Motivation and contribution**: participants should be able to show genuine interest in the topic and explain how they would benefit from and add value to the activity.
- **Balance**: aim for gender balance, cultural diversity, and a mix of first-time and more experienced participants to create a richer group dynamic and peer-to-peer learning opportunities.
- **Inclusion**: young people with fewer opportunities should have equal access and the necessary support to take part.

All applicants' data should be stored in the CRM system in line with GDPR and national data protection laws. Update statuses directly in the system (e.g. "review," "selected," "confirmed," "waitlisted," etc.). This way everyone can work in real time, avoid duplication, and ensure a transparent record of the selection process.

3. Finalise the travel plan

Update the travel plan drafted in the previous phase with the confirmed participants and group leaders. Link each application record to the corresponding travel details in the CRM system so it is visible who is travelling where. Preparing the travel details in the CRM at this stage will also simplify later reporting. This step ensures that routes, times, and connections are realistic and safe. It also allows partners to coordinate group travel where possible.

4. Collect parental consent (if minors participate)

If the activity involves underaged participants, consent forms must be collected in advance. These forms are essential for legal compliance and for ensuring parents or guardians are fully informed about the mobility. Signed forms should be stored digitally in a secure place, like SharePoint.

5. Order T-shirts or visibility materials

T-shirts and other visibility items (bags, badges, notebooks) are not just souvenirs, but also a way to build team spirit and promote the Erasmus+ identity.

6. Prepare the timetable in detail

With participants confirmed, you can adapt the draft timetable to their needs. Make sure it reflects the learning objectives, addresses the competences set out in Youthpass, and includes group building, intercultural elements, and time for daily reflection.

SUGGESTED DIGITAL TOOLS FOR THIS PHASE

- Microsoft Teams – for ongoing partner communication
- SharePoint – for storing parent consent forms, and other documents securily
- CRM system (PowerApps) – for registering participants, linking them with travel records, and tracking selection statuses
- Canva – for designing visibility materials

By the end of this stage, all group leaders and participants should be selected in a fair and transparent way, travel arrangements updated in the CRM, and all necessary documents (applications, parental consents, visibility materials) securely stored. With participants confirmed, the focus can now move to preparing the logistics and ensuring everyone is ready for the mobility.

PREPARATION

About a month before the mobility, the preparation phase starts and continues until two weeks before departure. The aim here is to turn plans into reality: booking tickets, arranging insurance, setting up communication, and preparing participants for the journey. Careful preparation ensures a smooth start and helps participants feel safe, informed, and ready.

KEY STEPS IN THE PREPARATION PHASE

1. Buy travel tickets

We recommend that organisers buy the tickets directly for participants. This reduces the financial burden on young people, especially those with fewer opportunities, as they do not have to spend money in advance to join the mobility. It also makes it easier to keep track of all necessary documents and ensures that everyone is supported. Booking should be done in cooperation with partners and group leaders to meet everyone's needs. All travel documents and invoices must be uploaded to SharePoint and registered in the CRM system so they can be used later for reporting and reimbursements if relevant.

2. Arrange insurance

All participants must have valid insurance for the whole mobility. Erasmus+ requires that insurance covers medical care, accidents, and liability. Collect proof of insurance from each participant and store it in SharePoint so that all partners can check and confirm coverage before departure.

3. Set up communication channels

To keep everyone connected, create clear communication channels for the group. Microsoft Teams can be used for coordination among partners and group leaders, while WhatsApp, Messenger, or Discord can be set up for participants. Create national threads in local languages to avoid language barriers and make sure everyone is well prepared and informed.

4. Organise preparatory meetings

Pre-departure meetings help prepare participants for the mobility. They provide space to explain the programme, travel arrangements, and practical rules, and to answer questions. These meetings can be held online or in person by national group. It is also the right moment to introduce intercultural learning and Youthpass, ensuring participants understand the learning objectives and outcomes.

5. Prepare materials and equipment

Review the final timetable and make a detailed list of all materials needed for the sessions (flipcharts, markers, name tags, laptops, projectors, extension cables, etc.). Divide responsibilities among partners for preparing and bringing materials and record these tasks in Microsoft Planner so everyone can see who is responsible. This ensures that nothing important is forgotten and avoids duplication.

6. Collect special needs information

If participants require specific support (dietary needs, accessibility, medical conditions), collect this information early. This allows you to adapt logistics and ensure the mobility is inclusive. Such information can also be gathered through the participant application form. Store sensitive data securely in the CRM system and make it accessible only to those who need it.

SUGGESTED DIGITAL TOOLS FOR THIS PHASE

- Microsoft Teams – for communication with partners and group leaders
- SharePoint – for storing tickets, invoices, and insurance documents
- CRM system (PowerApps) – for tracking travel details, participant insurance, and special needs information
- Microsoft Planner – for distributing responsibility for preparing materials and tasks
- Communication apps (WhatsApp, Discord, Messenger) – for direct contact with participants

By the end of this stage, travel should be booked, participants insured, communication channels active, and all materials ready. With participants confident and informed, the activity can move into the Pending phase, which focuses on final confirmations before departure.

PENDING MOBILITY

This phase starts about two weeks before departure and lasts until the group leaves for the mobility. Its purpose is to carry out all final checks, confirm details with partners and participants, and ensure that everything is in place. Clear communication and careful follow-up during this phase help avoid stress and last-minute surprises.

KEY STEPS IN THE PENDING MOBILITY PHASE

1. Reconfirm accommodation and venue
Double-check all bookings with the venue and accommodation. Confirm room allocations, meal plans, and technical equipment. Make sure special needs and dietary requirements are communicated clearly. Keep confirmation emails and contracts logged in the CRM system so all partners can access them.

2. Finalise participant data
Ensure that all participant data in the CRM system is complete and accurate. This data will also be needed later for reporting, so keeping it updated now ensures everything is ready after the mobility.

3. Share final information with participants
Send a final information package that includes travel details, meeting points, emergency contacts, a short checklist of what to bring.

4. Hold final partner check-in
Organise an online meeting with partners and group leaders to go over last details: travel, programme, responsibilities, and risk management. This ensures that everyone is on the same page and know how to react if problems arise.

SUGGESTED DIGITAL TOOLS FOR THIS PHASE

- CRM system (PowerApps) – log communication with venues, record final participant data, and track confirmations.
- SharePoint – store contracts, invoices, information packages, and checklists in one shared place.
- Microsoft Teams – hold the final partner check-in meeting.
- Canva – design and format the final information package for participants.

By the end of this phase, all bookings should be reconfirmed, participant data updated, final information shared, and partners aligned. With everything double-checked, the group is ready to travel and the mobility can begin smoothly.

MOBILITY

This phase covers the implementation of the mobility itself, from the moment participants arrive at the venue until they return home. This is when all the preparation pays off: the timetable is put into practice, participants engage in non-formal learning, and the group experiences intercultural exchange. Careful implementation ensures safety, inclusion, and meaningful learning for everyone involved.

KEY STEPS IN THE MOBILITY PHASE

1. Welcome and orientation

The first day sets the tone for the whole mobility. Present the venue, daily timetable, house rules, and emergency procedures. Use icebreakers and team-building to create a safe and welcoming atmosphere that helps participants settle in quickly.

2. Documentation

During the mobility participants must sign the official participants' declaration, which serves as the attendance record. If they travel sustainably (train, bus, carpool), collect a green travel declaration to confirm eligibility for extra funding. Gather consent forms for photos/videos where relevant. Scan and upload all signed documents to SharePoint so they are securely stored and accessible to partners.

3. Import the activity into the Beneficiary Module

Use the participant data prepared earlier to update the Beneficiary Module with accurate information (participants, travel details, etc.). Complete this before the end of the mobility to ensure reporting is ready on time.

4. Deliver the programme

Facilitators run sessions according to the timetable while staying flexible to group needs. Combine a variety of non-formal methods such as workshops, outdoor activities, reflection groups, and intercultural evenings. Link each session clearly to the agreed learning objectives.

5. Ensure wellbeing and safeguarding

Group leaders should check in daily with their teams, and organisers must provide safe channels to report concerns. Pay attention to dietary needs, accessibility, and mental health. Record any incidents in the CRM system to ensure transparency.

6. Monitor learning with Youthpass

Introduce Youthpass at the start and explain the eight key competences. Encourage daily reflections through groups, journals, or digital tools. On the final day, distribute the first two pages of the Youthpass and support participants in drafting their learning outcomes.

7. Communication and visibility

Share updates, group photos, and short videos on social media for promotion. At the end, create a group photo and final video. Always follow Erasmus+ visual guidelines and collect consent before publishing any material.

8. Evaluations

Gather daily feedback through short surveys or reflection groups. Hold a mid-term evaluation to address issues during the mobility, and a final evaluation on the last day (e.g. via Microsoft Forms). Save results in SharePoint in Excel and PDF formats for reporting.

9. Dissemination and action plans

In the final days, work with participants to draft dissemination and action plans using official templates. Plans should outline how results will be shared, the tools to be used (social media, school visits, community events), and who is responsible.

SUGGESTED DIGITAL TOOLS FOR THIS PHASE

- Microsoft Teams and SharePoint – for coordination and storing signed documents, evaluations, and dissemination plans
- CRM system (PowerApps) – for recording incidents and updating participant information
- Microsoft Forms – for mid-term and final evaluations
- Padlet or Jamboard – for participant reflections and interactive sessions
- Canva and Clipchamp – for visibility materials and final video production

By the end of this stage, all documentation must be collected and stored in SharePoint, participants should have completed their Youthpass reflections, evaluations must be finalised, and dissemination plans agreed. With the programme successfully delivered, the focus can now shift to the follow-up phase to ensure the mobility has a lasting impact.

FOLLOW-UP

The follow-up phase begins once participants return home. Its purpose is to wrap up the activity in a transparent way, make results accessible, and ensure the impact goes beyond the mobility itself.

KEY STEPS IN THE FOLLOW-UP PHASE

1. Collect reports from partners

Ask each partner to provide a short written report on their group's experience, outcomes, and recommendations. Make sure all related participants complete the official Erasmus+ participant report. Store everything securely on SharePoint so it is centralised and accessible.

2. Finalise Youthpass certificates

Support participants in completing their Youthpass learning outcomes. Generate the certificates through the Youthpass portal and make them available to the learners.

3. Process outputs

Collect and organise the results of the mobility (presentations, workshops, videos, learning materials). Save them in SharePoint and, where appropriate, make them publicly available. Archive all multimedia and documentation created during the mobility so that there is a complete record in the CRM system and Sharepoint.

4. Disseminate results

Put into action the dissemination plans developed during the mobility. Share photos, videos, and stories on social media, publish articles on internal and external channels, and organise presentations in schools or local communities.

5. Evaluate the impact

Review the evaluations from participants, partners, and group leaders. Analyse what worked well and what could be improved, and record these lessons for future projects.

6. Support ongoing engagement

Keep participants connected after the mobility. Share information about volunteering, future projects, or local opportunities so they can stay involved. This ensures the impact continues beyond the activity itself.

7. Archive records in the CRM system

Update all participant statuses to "completed" (or equivalent), log dissemination activities, and close the project flow in the CRM. This guarantees that all information is properly stored and finalised.

8. Prepare the final report

Collect and log all necessary data and information in the CRM (such as dissemination reports and impact) and draft the report in line with Erasmus+ requirements. For accredited projects, ensure that all information is collected, organised, and stored so it is ready when the report is due.

SUGGESTED DIGITAL TOOLS FOR THIS PHASE

- SharePoint – for storing reports, outputs, evaluations, and multimedia
- Youthpass portal – for issuing final certificates
- Microsoft Teams – to coordinate with partners on reports and follow-up
- Canva and social media platforms – for dissemination materials
- CRM system (PowerApps) – for updating statuses, logging dissemination, and archiving data

By the end of this stage, partner and participant reports should be collected, Youthpasses finalised, outputs saved and shared, dissemination activities carried out, evaluations analysed, and all records archived in the CRM and SharePoint, and if relevant final report is written. With this, the activity cycle is complete, and the impact is secured for the future.

COOL COLLABORATION II RESOURCE PACKAGE

To support the use of this guide, we have prepared the Cool Collaboration II Resource Package. It contains ready-to-use templates that make organising mobilities easier, more transparent, and consistent across partners.

The package contains:

- **Tasklist template** – to use in Microsoft Planner and assign responsibilities, set deadlines, and track progress among partners.

- **Reporting template** - to plan the activity idea, collect dissemination reports, monitor changes, and note down any issues that occur during the mobility.

- **Timetable template** - to design and share the programme structure, including sessions, logistics, and daily schedules.

- **KA1 Activity process template** – to use with Desktop version of Microsoft Planner containing all the tasks, relative deadlines and dependencies between tasks.

- **Dissemination Template –** for young participants to plan their own dissemination activities

The Resource Package can be downloaded from here.

All templates are editable and can be adapted to your needs.

LEARN MORE

For more details and official references, see:

- Cool Collaboration II Webpage

- E29 Digital Tools – Youtube Tutorial Collection

- How to build a Model Driven Power Apps

- Erasmus+ Programme Guide

- Youthpass Platform

- Erasmus+ Visual Identity and Branding Rules

- SALTO Youth Toolbox for Training and Youth Work

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