



PROJECT MANAGEMENT

GUIDEBOOK



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1. Executive Summary

The **Management Guidebook** is a guide that outlines the specific management structures, operational and functional project management throughout the project lifespan. The contents of the Management Guidebook will focus on:

- Decision-making strategies
 - i) project bodies and actors and their roles;
 - ii) decision-making procedures.

- Contingency Plan
 - i) assessing the project partners needs;
 - ii) assessing contingencies impact;
 - iii) evaluation and monitoring procedures and tools;
 - iv) notification procedures planning.

- Mechanisms for resolving problems within the partnership
 - i) identification of possible scenarios;
 - ii) management structures for problems resolution in the partnership;
 - iii) procedures detailed implementation.

- Communication procedures
 - i) internal communication between project partners;
 - ii) external communication;

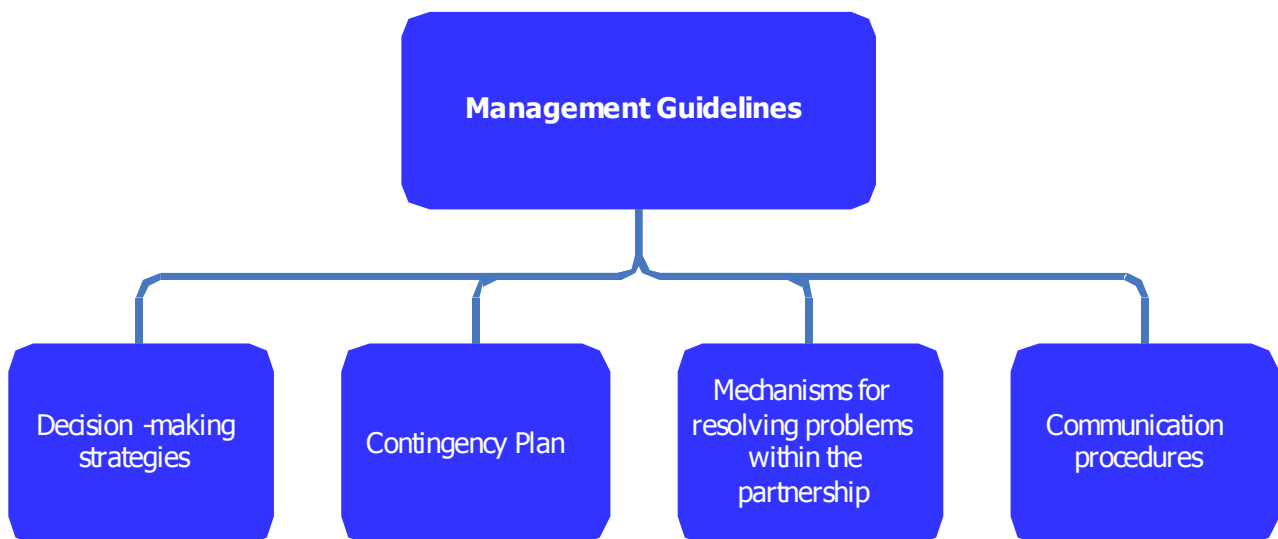


Fig. 1 – Management Guidebook structure

2. Acronym Table

EU Structure	Acronym
European Commission	<i>EC</i>
Education, Audiovisual and Culture Executive Agency	<i>EACEA</i>
Roles	Acronym
Project Manager	<i>PM</i>
Administrative	<i>ADM</i>
Communication Manager	<i>CM</i>
Communication Officer	<i>CO</i>
Quality Manager	<i>QM</i>
Project Structure	Acronym
Lead Applicant	<i>LA or TIA</i>
Local Coordinator	<i>LC</i>
Project Management Board	<i>PMB</i>
Communication Team	<i>CT</i>
Work Package	<i>WP</i>
Work Package Leader	<i>WPL</i>
Project Partners	<i>PPs</i>

3. Management structure and decision-making strategies

This chapter will first present the project management structure, its main actors and their roles and then the decision making approach and procedures to be followed by each project actor.

The overall project management structure is presented in the fig. 2 below.

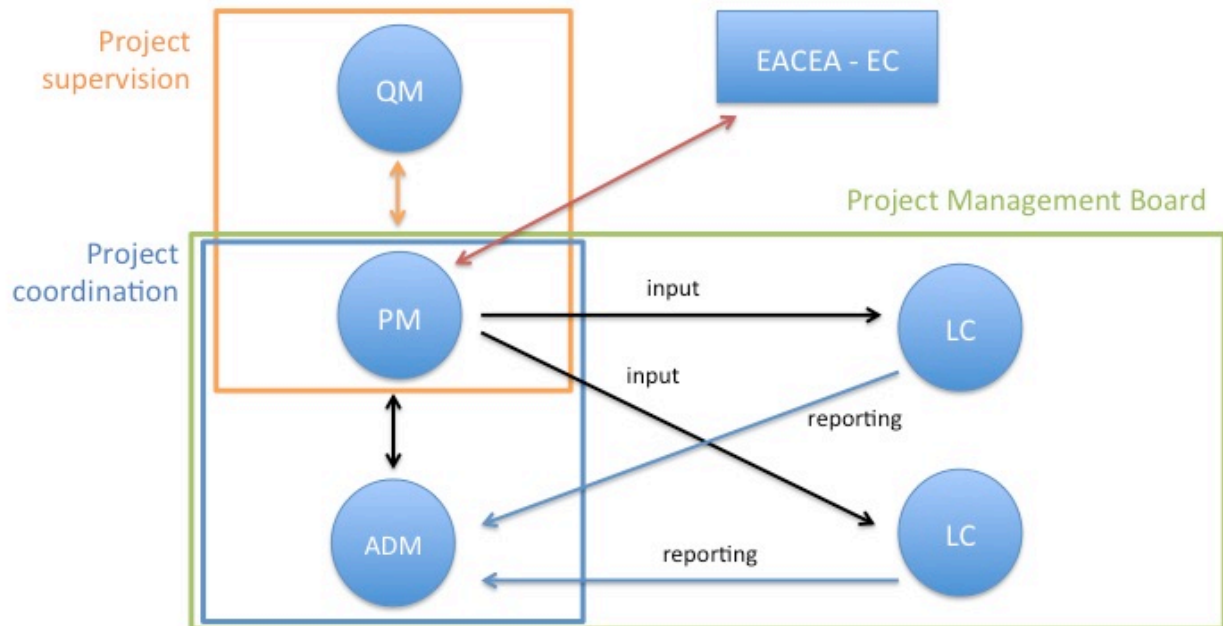


Fig. 2 – Project Management Structure

It is possible to identify 2 main decisions level (project and activities) and for each level one or more specific actor is responsible.

3.1 Project bodies and actors and their roles

3.1.1 Project bodies

Project bodies, as defined by the application and during the first phase of project development, are:

- Project supervision
- Project coordination
- Project Management Board

The **Project Supervision** is composed by a Quality Manager (QM) and the Project Manager (PM) responsible for coordinating, monitoring and evaluating the activities.

The **Project Coordination** is composed by the Project Manager and the Administrative (ADM) appointed among the Lead Applicant staff with the main responsibility to give inputs to partners, gather financial information by partners and draft the Progress Reports and keep communication and exchange of information with EACEA. At local level, Local Coordinators will collect and forward the necessary documents and submit them to the PM and ADM. The PM will assist in timely collection of all necessary data and documents and keep in line with the foreseen project timeline of activities.

The **Project Management Board (PMB)** is composed by the Project Manager and Local Coordinators (appointed one for each partner). These figures will be responsible for the activities done at local level with the final scope to keep the project on track during the whole implementation. In order to be more specific and share responsibility, for each WP one WP Responsible has been selected and sometimes supported by another partner:

WP1 Project Management: TIA FORMAZIONE INTERNAZIONALE

WP2 Communication: ILABOUR and EU DIASPORA COUNCIL

WP3 Building local events and youth participation: IED

WP4 BUILDING INTERNATIONAL AWARENESS: EU DIASPORA COUNCIL and TIA FORMAZIONE

WP5 Dissemination. EUNI PARTNERS and INTERNATIONAL LABOUR ASSOCIATION

WP6 Follow-up: ACD LA HOYA

3.1.2 Roles

Each of the bodies presented above has a specific and defined role in order to avoid overlapping in the decision making process and according to the principle of “vertical subsidiarity”. So the decision should take place at the lower possible level, according with the basic principle presented in the fig. 2 above. A more detailed description of the decision making process is provided in the paragraph 3.2 below.

The core function of the **Project Coordination** are:

- decide about the strategy, at project level, on technical, communication, administrative and financial issues;
- decide on project changes required to achieve the final objectives;
- to secure a smooth cooperation among Project Participants.

Function of the **PMB** is to provide mutual support and operative products for the efficient management of the project activities and overall implementation:

- decide about methodology and operative framework;
- support the implementation of project activities in terms of time-schedule, coordination of WP leaders and granting the complementarities of the outputs of different WPs.

The Project Supervision body, has no decision power. Its function is to verify, monitor and certify the quality of the project starting from the value indicators, providing to the Project Coordination

and PMB updated information to solve bottleneck and manage risks that may affect the achievement of project objectives.

3.2 Decision-making procedures

The principle of vertical subsidiarity applies to the decision making procedure.

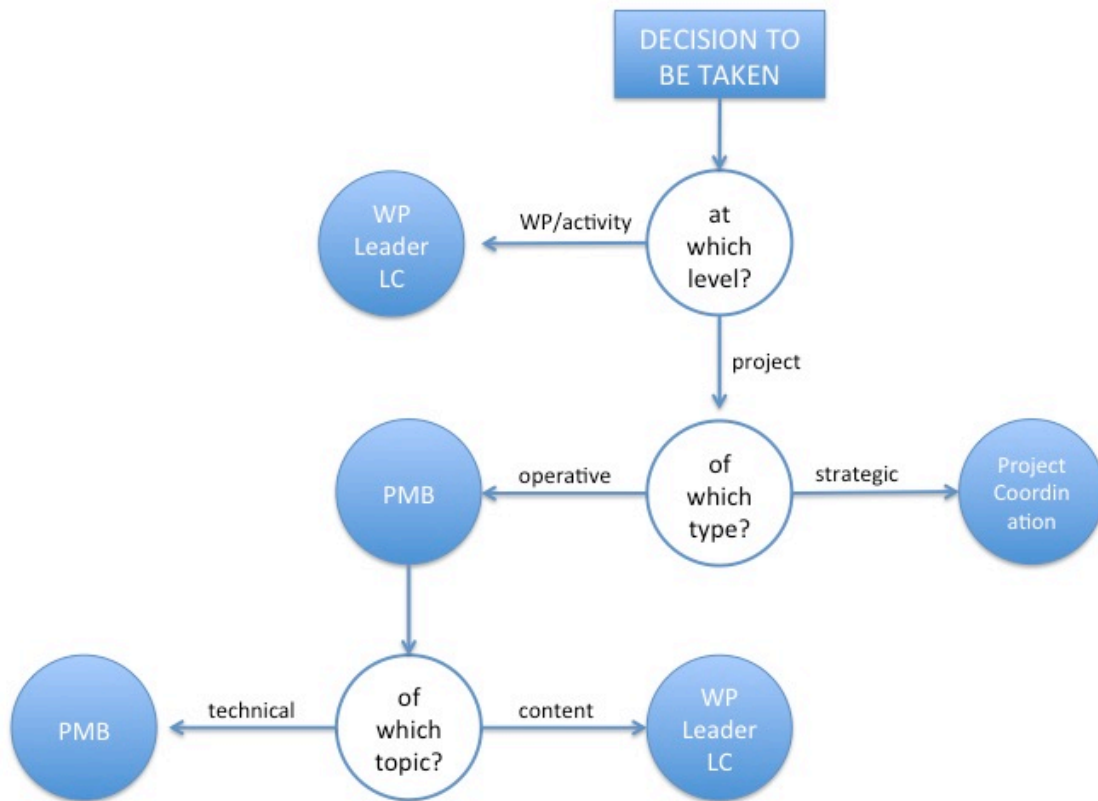


Fig. 3 – Decision Making structure

The principle of vertical subsidiarity implies that each decision should be taken by the body which is the closest to the target of such decision. For this reason if a decision is related with an activity or a single WP, the decision body will be the relevant WP Responsible or Local Coordinator. In case the decision involves more than one WP or could have an impact on the overall project implementation, the question to be answer is whether the decision is strategic for project implementation or it is a mere operative decision. The LA has the sole responsibility for deciding it. In case the decision to be taken is considered to be **strategic**, the Project Coordination should be involved in the decision process. Generally the LA will propose itself a decision or will ask the most involved partner to formulate a proposal. The PMB is then ask to comment on that proposal and to possibly reach a common decision agreed by all partners (consensus).

4. Contingency Plan

4.1 Assessing the project implementers needs

With project implementers we mean all project partners with a specific role in implementing project activities. Their needs are assessed according with the 3 key factor for project implementation:

- Objectives
- Time
- Budget

According with each key factor, three indicators can be identified:

Objectives	<ol style="list-style-type: none"> 1. Definition 2. Achievability 3. Commitment
Time	<ol style="list-style-type: none"> 1. Scheduling of activities 2. Identification of critical points 3. Possible scenarios and identification of solutions
Budget	<ol style="list-style-type: none"> 1. Budget consistency with project activities 2. Budget needs and critical issues 3. Possible scenarios and budget modification/solutions

The process of assessing project implementers needs is continuous during the whole project duration. Once done at the beginning of the project, ad hoc tools remains at disposal of the partners. In case of a new need arising, each implementer is responsible to highlight such need to the PM who is in charge of collecting the requests.

4.2 Assessing contingencies impact

To assess the impact of the contingency plan and to identify the potential solutions, the scheme below will be adopted. Once the contingency arisen, the first evaluation will be on which of the following issues such contingency will mainly impact:

- Budget
- Partnership
- Activities

Thus do not mean that one issue exclude the other and the specific contingency strategy could imply to work parallel on different issues. However it is always important to prioritize the reaction, focusing firstly on the issue for which a deeper impact is expected.

To allow a clearer description of the impact assessment, the contingency plan has been divided according with the three issues mentioned above. The letters B for Budget, P for Partnership and A for Action are inserted in the figure to show the connection between the different paths. The solutions are identified in green if they are acceptable and in red if they can cause serious problems to the overall project.

Once identified the potential impact and the possible solutions, the PM develops and implements the contingency plan, consulting the PMB in case of contingency with a deep impact on the whole project.



Fig. 4 – Contingency Plan / Activities

If it is expected that the contingency will impact on project activities, the first question is which potential effect could it have on activities development. This question has 2 main answers:

- The contingency will cause a delay in the implementation of activities;
- It can prevent the partners to achieve the expected objectives (or results or output).

In the first case a rescheduling of activities could be necessary. If the rescheduling is not possible, it will be necessary that some of the partners less involved in the activities provide some support

in order to speed up the implementation and reach the expected results in the due time. If also this option is not feasible because, for example, the activities have to be implemented in a specific country where there is only one partner able to perform it, it could be necessary to redefine the objectives (or results or output) of the activity. According with the relevance of the activity itself, this last solution could be feasible or not but in both cases it is not the preferable solution.

The second case is that the potential effect of the contingency is the non-achievement of objectives. In this case it is crucial to identify any missing resource that could cause this negative effect. If the missing resource is “time” it goes back to the above explained situation, if it is “money” it enters the budget section (B) of the plan where some solutions can be identified. If none of these two resources is missing, that implies that the objective or expected results are unrealistic and need to be changed.

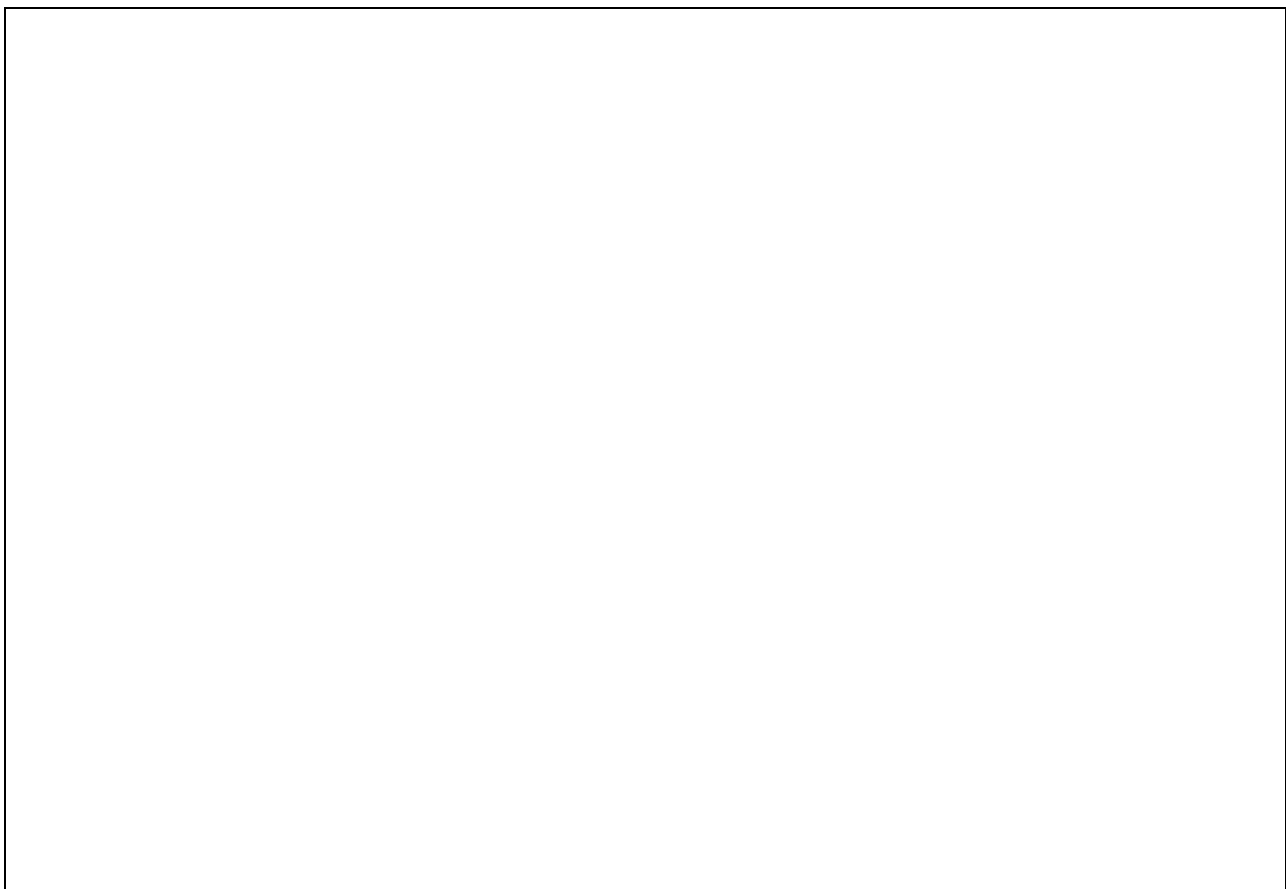


Fig. 5 – Contingency Plan / Budget

So, if the problem is related with “money”, i.e. budget issues, there are only 3 possibility:

1. The budget allocated for the specific WP or Budget line is not in line with expected activities;
2. The partner is not able to spend the allocated budget (under-spending);
3. The partner is spending too much for the activities implementation so it lacks economic resources.

The first problem can be solved quite easily, through the re-allocation of budget across WPs or budget lines according with partner needs. For this procedure partners should refer to the ADM in charge of the financial management.

The second problem is slightly more complex as it implies the analysis of the causes of the under-spending. Cases are two: or the budget is over-estimated so that the foreseen activities can be implemented without needing the whole budget foreseen, or, as it is most probably the case, the partner is facing any liquidity problem that prevent it from advancing the payment and wait for ERDF reimbursement. In this second case individual financial solutions should be considered, both with market financial instruments (bank loans) or with other instruments to be identified.

The most critical situation is if the lack of budget, i.e. the over-spending. In this case there are 3 possible solutions:

- a. The partner is able to find other economic resources to be spent for project implementation;
- b. If solution a. is not viable, the partner can ask the support of other project partners to implement the foreseen activities reducing its spending;
- c. If nor solution a. nor b. are viable, the unique remaining option is to redefine the objectives (or results or products) of the activity itself.



Fig. 6 – Contingency Plan / Partnership

The deeper impact a contingency can have is on the project partnership both because project partners are the main resource of the project itself and because procedures and solution can be many but some of them are definitively not recommended.

The first necessary step is to understand how the contingency can impact on the partnership. There are 3 main potential effects: the rising of conflicts between two or more partners, the withdrawal of one partner and the lack of commitment/effort of one partner.

The first case has only one possible solution, that is to identify a super-partes negotiator to mediate the conflict and find a solution. As the result of the negotiation process cannot be predict, partners should do whatever they can to try to avoid any conflict.

The decision of one partner to withdraw should be considered as a very risky situation. In fact the withdrawal of one partner has always a deep impact on project implementation and on the possibility of reaching expected results and objectives. For this reason the preferable solution is to provide the partner with any necessary support to try to avoid its withdrawal. If the withdrawal is not avoidable, the LA should consider the possibility of finding a new partner to substitute the withdrawing one. If the consortium approves the selected new partner, then the amendment procedure to formalize the change in the partnership will start, otherwise, if the substitution is not possible, the LA will ask an amendment formalizing the withdrawal but with no substitutes. To be always kept in mind that this last option seems to be almost not acceptable by EACEA in case the withdrawing partner is the only partner from that countries as the project cannot “loose” any country.

Last possible effect of a contingency impacting on the partnership is that one of the partner decide to act as a “free rider”, thus meaning a low commitment to project objectives and a reduction of effort that do not allow the partner to comply with its task. In this case the LA and the PMB will explore the possibility of supporting or even forcing the partner in complying with its contractual and project obligation. In case this attempt won’t succeed the LA could refuse to accept the costs claimed by that partner as it has not implement the expected activities. If this occur it is clear that such a partner could not stay any more in the project so the path goes back to the identification of a potential substitute and the consequent amendment procedure.

5. Mechanism for resolving problems within the partnership

This action includes all the activities used to identify, first, and resolve, then, any strategic and operative problem linked with the project activities implementation and management.

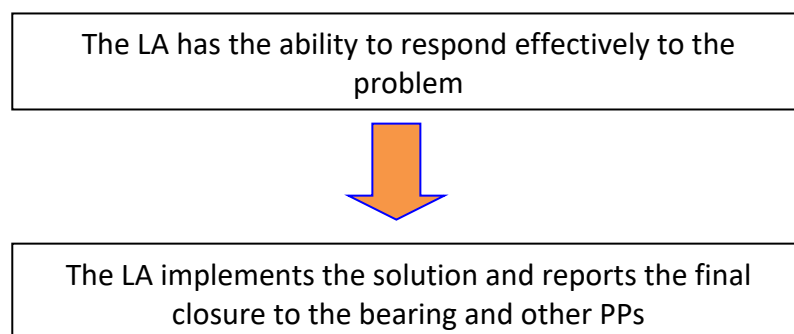
During the entire project lifespan, each PP has the responsibility to report to the LA all the detected problems that could affect the right project activities implementation. The LA will communicate the problem to the entire project partnership and immediately the problem resolution procedure starts with the Project Coordination and PMB support depending to the problem nature. **During the development of the project, it is absolutely mandatory to inform of any difficulties or doubts to the Lead Applicant, without deciding by themselves in force of the co-beneficiary agreement.**

In the next paragraphs the possible scenarios that could occur, the management structure for problem resolution within the partnership and the procedure detailed implementation are explained.

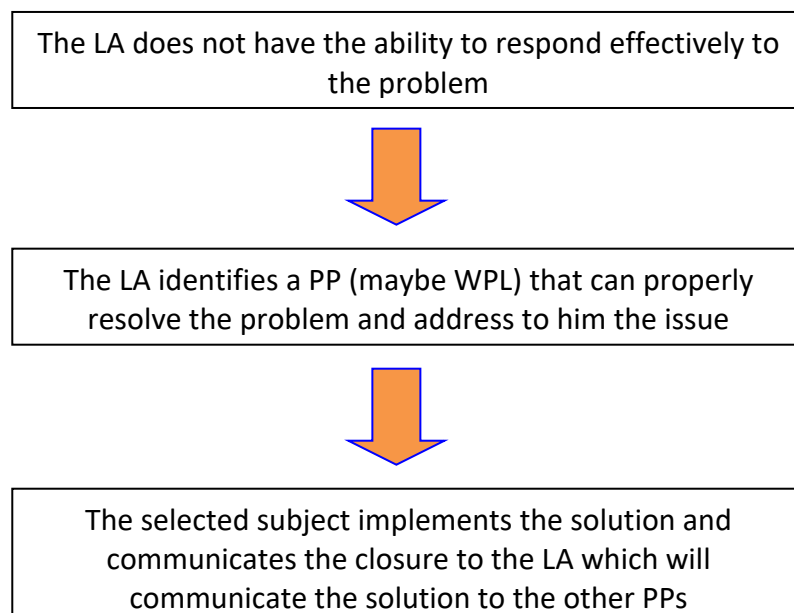
5.1 Identification of three possible scenarios

Once the LA has received the problem reporting, three resolution scenarios are possible:

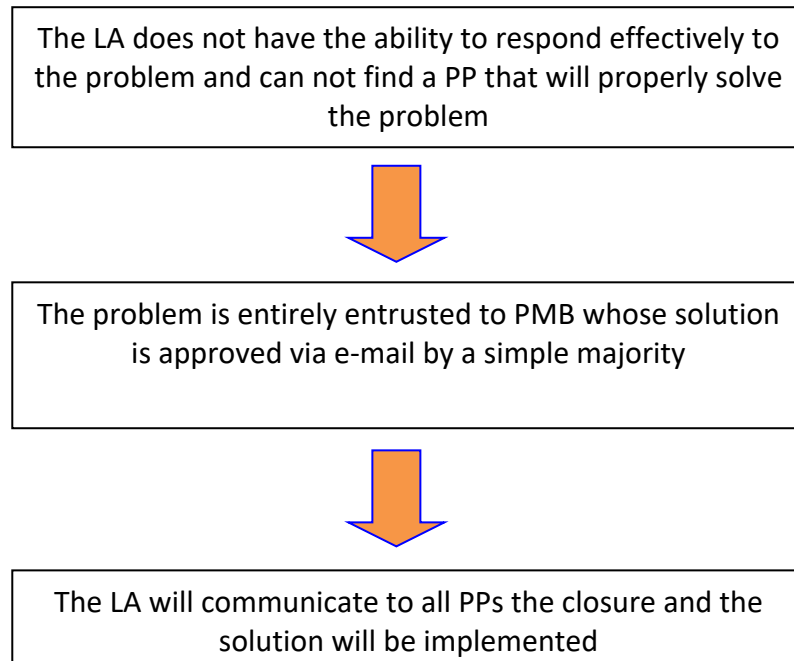
Scenario 1:



Scenario 2:



Scenario3:



5.2 Management structures for problems resolution in the partnership

It is possible to distinguish two different level of problem resolution within the project:

- i) Strategy problems (problems affecting the whole project implementation);
- ii) All other specific operative problems.

In the first case the responsible body within the project partnership is the LA that can ask for advise to the PMB or the Quality Manager.

In the second case all the questions have to be submitted to the PMB. For problems related to technical issues the responsible body within the partnership is the LA with the project coordination support. For questions related with content issues the responsible body is the WPL of the specific WP who will always and promptly inform the LA.

The management structure for problems resolution (fig. 8 below) follows the same scheme as the decision-making procedure.

5.3 Procedures detailed implementation

As for the decision making procedure, the principle of vertical subsidiarity is applied:

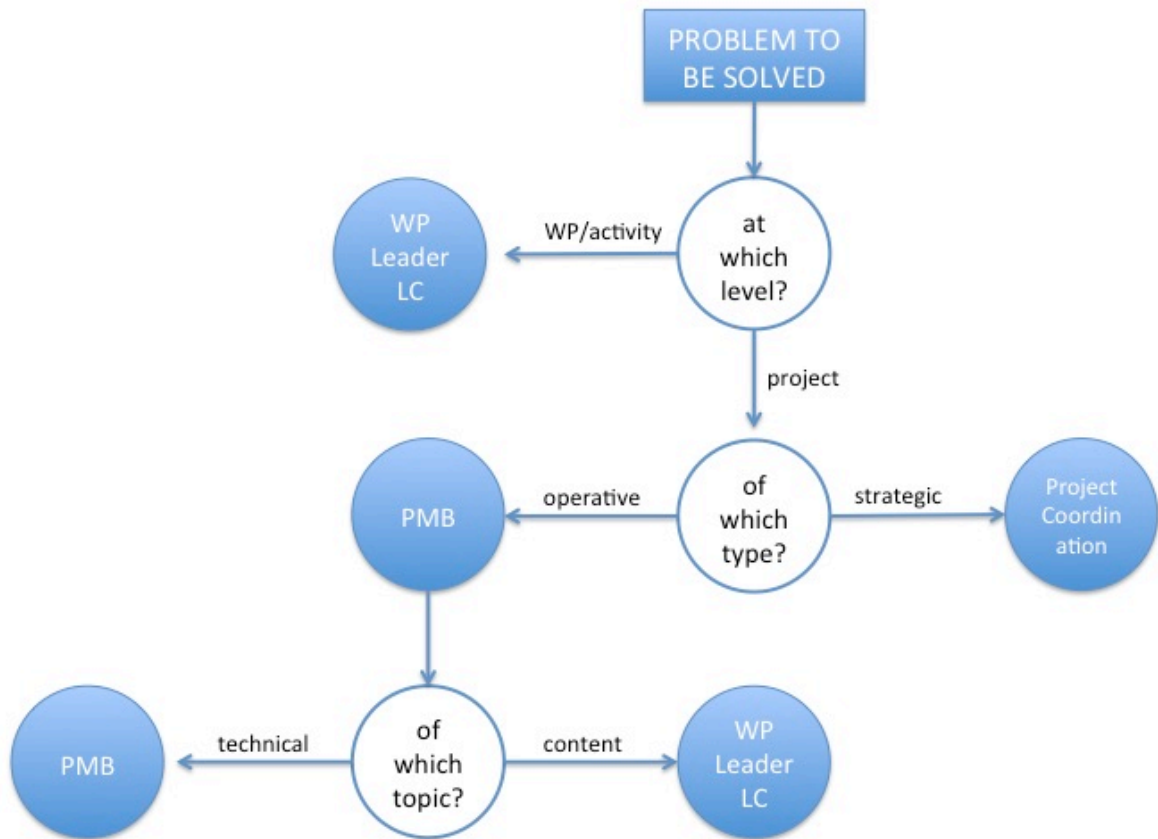


Fig. 7 – Problem solving procedures

The same procedure described for the decision making structure applies also to the problem solving procedure.

6. Communication procedures

In the project first phase, communication main objective is to raise awareness and generate interest amongst the different target audiences and activate the primary groups. In the second phase the most important objective is to inform audiences about results of the campaign in order to highlight the role of EU and demonstrate the benefits achieved.

The communication addresses the following targets:

- i) **Primary target:** 18-30 young people (second generation youth with non-EU migration background) of the participating countries that will be involved during the local meetings, International Workshop, debates, follow-up and networking activities.;
- ii) **Primary stakeholders (indirect beneficiaries):** Universities, Local Institutions, Cultural and Voluntary Associations, Third Sector representatives, Movements, Unions, Think-Tanks, etc.;
- iii) **Other:** General public and media.

For complete information about the Communication tools and procedures see the RAYSE Communication Plan.

6.1 Internal communication between project partners

Internal communication has major part in all the activities to ensure smooth co-operation and knowledge transfer between PPs (e-mailing, internet calls, project events). It includes also dissemination of EACEA communications, thematic seminars, etc. among all PPs and the communication between PPs and the External Expert in charge of the quality evaluation.

6.1.1 Principles of implementation

A Communication Manager (CM) will be appointed within the responsible partner assuring constant relations with each Communication Officer (CO) appointed for each partner. CM and Cos will constitute the Communication Team (CT) at project level. A specific Communication Plan will be preliminary discussed by the consortium during the kick-off meeting and approved by the CT and PM, permitting to define communication objectives in a clearly, detailed and measurable way. Generally all communication should be copied to the ITS and specifically to FOSCA BARBATO if they are via e-mail (f.barbato.tiaformazione@gmail.com)

6.1.2 Internal communication tools

- Communication Plan;
- Communication Strategy;
- Normal ICT tools (e-mail, skype, telephone, fax);
- Physical meetings.

6.2 External communication

All PPs take part in Communication and Dissemination of RAYSE project. The partners responsible for external communication (WP2) are INTERNATIONAL LABOUR ASSOCIATION and EU DIASPORA COUNCIL.

6.2.1 External communication tools

- visual identity and message architecture,
- creative templates for partners own use,
- local/regional events for the target groups,
- international workshop, -media elements,
- press releases (printed, electronic and online media); newsletter,
- RAYSE blog,
- information materials about the project,
- leaflets in national languages, brochure in English,
- banner.

6.2.2 Objectives of external communication

- Forwarding messages to the target groups of the project by which the reputation of social enterprises, that take an important role in the labour and social integration of the disadvantaged people is growing;
- Reaches that the attention and the interest of the target group be more intensive for these participants;
- Makes target groups become committed to these economies, and they help the participants of the enterprises to stay successful on the market;
- It shall review the achievements of social economies and enterprises for a wider audience.