# TRAINING COURSE ON CAPACITY BUILDING

## TRAIN THE TRAINERS MANUAL

**BE+
PROJECT**

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## THE IMPORTANCE OF A COMMON METHOD

The BE+ project has been testing the training activities explained below through two seminars attended by more than 30 teachers and headmasters from 4 different countries. A key element which has surfaced from the testing, and was highlighted by the participants, has been the importance of using a common method.

Project Cycle Management (PCM) can be a crucial planning tool in Erasmus projects, providing a structured framework for effective project planning helping delivering higher quality projects. This "train the trainer" manual will help schools in introducing this method in the framework of their international activities and projects. There are three main reasons why headmasters or teachers in charge of international activities should choose PCM as planning methods:

### EFFICIENT PLANNING
PCM allows for systematic planning and organization of project activities, ensuring that all necessary steps are considered and implemented in a logical sequence. It helps potential project teams to define clear objectives, identify relevant activities, allocate resources appropriately, and establish realistic implementation paths.

### HOLISTIC APPROACH
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### CLARITY AND CONSISTENCY

PCM helps in maintaining clarity and consistency throughout the project lifecycle. By helping partners in establishing shared methodological approach and clearly defining roles and responsibilities this method will ensure that all project partners are on the same page, reducing confusion and enhancing collaboration.

## OBJECTIVES OF THE MANUAL

The objective of the BE+ "train the trainer manual" is to support those who lead the capacity building process inside the school around international questions. The manual is designed to enhance the capability of their colleagues to plan and implement EU projects efficiently within the context of the Erasmus program.

## TOPICS ADDRESSED BY THE MODULES

The course will be addressing a set of topics through three modules pertaining project planning in general and the first three key phases of the project cycle. The topics of the modules are:

1. Introduction to the concept of project
2. Indicative Programming
3. Identification



## TIMEFRAME

The suggested timeframe should consider the following aspects:

1. The length of each module: each module can be carried out in a time frame which ranges between 4 to 6 hours. The main element to consider is the length of the group works which will have an impact on the overall length of the workshop.
2. The interval between modules: he time between the workshops should be excessively extended as this might lead to losing momentum and interest among the participants.

## TARGET PARTICIPANTS

The manual is primarily targeting headmasters and teachers working in the school with international questions. In turn, the participants in the workshops should be the staff of the school, primarily teachers and administrative/support staff. A faster and more effective process towards the development of an Erasmus project could be achieved if the participants would include representatives of schools from more countries. This could lead directly to the development and submission of a project proposal.

# EXPECTED LEARNING OUTCOMES

Thanks to this train the trainer manual on project cycle management, participants can expect to achieve the following learning outcomes:

- Acquire expertise for guiding and supporting colleagues in the capacity building process related to international projects.
- Gain a general understanding of the key phases of the project cycle, specifically in the context of EU projects within the Erasmus+ programme.
- Develop the basic knowledge and skills to effectively plan and implement EU projects in the participating schools.
- Enhance the trainer's ability to facilitate workshops and training sessions on project cycle management for other teachers and staff.
- Learn a practical method for conducting indicative programming and project identification.
- Understand the importance of effective project planning and how it contributes to successful project outcomes.

# PLANNING THE TRAINING MODULES

The planning of the modules should consider the following elements:
Location of the training activity, equipment and digital tools, preparation of the participants, organisation of the work during the workshop.

## LOCATION:

Choose a spacious venue that can comfortably accommodate all participants.
Ensure the venue has appropriate seating arrangements for groups of 6-8 participants and sufficient space for group activities and discussions.

## EQUIPMENT AND DIGITAL TOOLS:

Ensure access to necessary audio-visual equipment, such as projectors, screens, and speakers, for presentations and multimedia materials.
Verify that the venue has reliable internet connectivity for online resources and demonstrations.
Prepare additional tools and materials, such as a flipchart, markers, and handouts of the slides, to facilitate interactive learning.

## PREPARATION OF PARTICIPANTS:

Communicate the workshop objectives, agenda, and any pre-workshop assignments or readings well in advance to allow participants to come prepared.
Encourage participants to bring their laptops or tablets for interactive activities and accessing online resources.

## ORGANIZATION OF WORK DURING THE WORKSHOPS:

Allocate sufficient time for interactive groupwork, group discussions, and practical application of learned concepts (see suggested timing).
Don't get lost too much in theoretical explanations but focus on hands-on activities to deepen participants' understanding of project cycle management.

Foster peer learning and collaboration by assigning group tasks and encourage knowledge-sharing among participants with a feed-back session before moving on to the next theme or step. Provide opportunities for reflection and Q&A sessions to address participants' questions and clarify concepts. By considering these planning tips, the training modules can create a dynamic and productive learning environment for 16- 20 teachers, enabling them to develop a set of basic skills and knowledge in project cycle management within the context of EU projects.

## TRAINING CONTENTS
### WHAT IS A PROJECT

An essential element from which to start and apply the common methodology of project cycle management is an understanding of what a project is.

*What is a project?*
*What distinguishes a project from other human activities?*
*Where does it all start from?*

Commonly, the word '**project**' is used to refer to innumerable activities that can be very different from each other, with a different degree of complexity:

- organising a holiday
- renovating a house
- writing a book
- organising a conference

All these activities are examples of projects that have to be 'managed' in order to achieve the desired results on time and on budget.

The **three key elements of the project** clearly emerge:

**OBJECTIVES:** the project is aimed at achieving an objective;

**TIME:** the project is to be carried out within a certain time period;

**RESOURCES:** the project is implemented through the use of predefined and allocated resources and at pre-determined costs.

### PROJECT CYCLE MANAGEMENT

Project Cycle Management (PCM) is a methodology for management activities and decision-making procedures used during the life cycle of a project (as defined by the European Commission). It encompasses a set of tools that, when applied, can ensure greater effectiveness of projects and programmes, understood as the ability to produce tangible and lasting benefits. Project cycle management capability involves the application of

knowledge, skills and techniques to successfully manage work and resources to achieve project objectives (and organisational goals) during the project lifecycle.
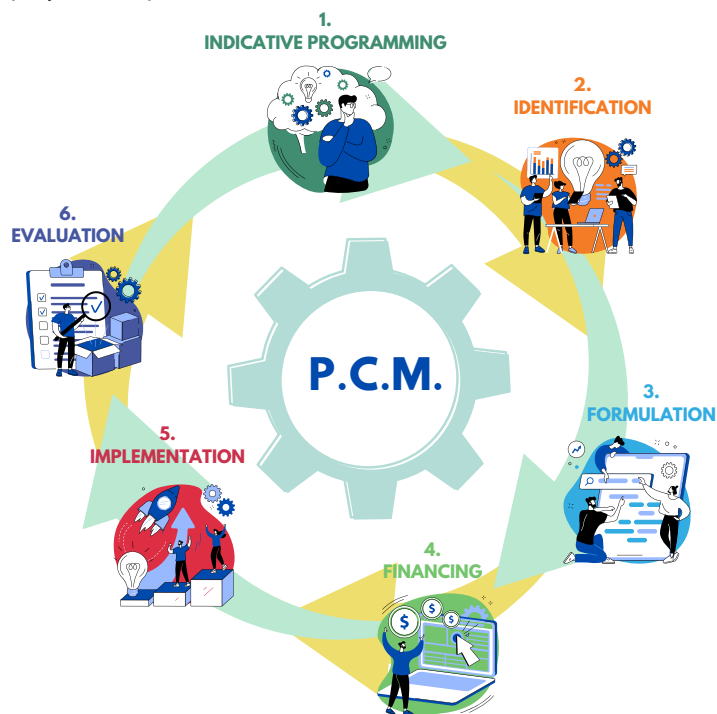


The PCM aims to promote the participation of key actors in programmes and projects, to share planning, so that higher quality and more incisive interventions are produced, which are capable of fostering sustainable development beyond the life of the project itself.

The project cycle introduced in the context of the training seminar has six different phases:

1. Indicative programming
2. Identification
3. Formulation
4. Financing
5. Implementation
6. Evaluation

# OPERATIONAL PROGRAMME

| 15 minutes |  | Welcome the participants. Introduce yourself and ask the participants to do the same and explain the objectives of the workshop. |
|---|---|---|
| 10 minutes Slides 3-12 |  | Introduce the concept of project by asking the participants to what they connect the word "project" in their work. List down on the board all the different elements they propose and discuss with them which are the three most important ones. Introduce the three project constraints "time-objectives-resources" |
| 25 minutes Slides 13-16 |  | Ask the participants to divide up in groups and provide them with the task. "You are a group of friends, and you have to plan your holidays together. Write down the phases of your holiday and the contents of each phase" |
| 5 minutes Slide 17-19 |  | Illustrate the 6 phases of PCM<br>• Indicative Programming<br>• Identification<br>• Formulation<br>• Financing<br>• Implementation<br>• Evaluation |

# PHASE 1 - INDICATIVE PROGRAMMING



**WHO WE ARE?**
**WHAT INTERESTS CAN WE SHARE?**
**WHO SHOULD BE INVOLVED?**

The purpose of this phase is primarily to identify and agree on the main objectives and priorities among the parties involved. This is done by understanding which aspects of a theme meet a common need for interchange (hence the common thematic framework).

Furthermore, the purpose to provide a relevant and feasible programming framework in which specific projects can be identified and prepared.

In the planning phase, local contexts are analysed to identify problems, opportunities and impediments that might be encountered by working together.

A project may originate either from a defined partnership that through a needs analysis on a specific theme, identifies a shared need to work on, or from a project idea that is proposed to a number of possible partners interested in its development and then converted into a cooperation project.

| | | |
|---|---|---|
| **10 minutes** |  | Introduce the key questions underlying the Indicative Programming Phase<br>• Who we are<br>• What can we share |
| **30 minutes** |  | Connect to the work done in preparation through the BE+ self-assessment questionnaire and the strategy of the school (if present) explain the importance of having a clear understanding of the strengths and weaknesses.<br> The participants shall divide up in groups and from the discussion should emerge a description of the school. |
| **10 minutes explanation of the concept of Common Thematic Framework<br>+<br>Exercise<br>At least 45 minutes** |  | The next step is to explain the importance of identifying common elements with other schools interesting in working on a common theme.<br>The next step is to ask the participants to divide in thematic groups and draft a common thematic framework on the basis of the themes they want to work on (organisational aspects, didactics, other themes). If your participants come from various schools, it's advisable to mix them in such a way that each group has representation from multiple organisations. |
| **5 minutes** | | The session is closed by illustrating the key aspects addressed during the day. |
| **5 minutes** | | Carry out the online evaluation |

## EVALUATION OF THE LEARNING ACTIVITY

The evaluation of the first phase can be carried out through a set of questions aimed at assessing the basic understanding of the key principles addressed during the session.

### 1-WHAT ARE THE THREE PROJECT CONSTRAINTS

| | |
|---|---|
| A) Objectives-Indicators-Results | |
| B) Time-Objectives-Resources | ✘ |
| C) Time-Activity-Results | |
| | |

### 2-WHAT IS THE PURPOSE OF PROJECT CYCLE MANAGEMENT (PCM)?

| | |
|---|---|
| A) It helps us do the right thing at the right time in the project life cycle | ✘ |
| B) We need it to calculate travel costs | |
| C) We need it to measure the length of the project cycle | |
| | |

### 3-THE PCM WAS BORN

| | |
|---|---|
| A) In the field of international cooperation and more precisely by the USAID agency | ✘ |
| B) In the academic field and more precisely at the University of Vienna | |
| C) In the field of international cooperation and more precisely by the Australiaid agency | |
| | |

### 4-HOW MANY PHASES ARE THERE IN THE PCM

| | |
|---|---|
| A) 3 | |
| B) 10 | |
| C) 6 | ✘ |

### 5-WHAT IS THE FIRST STAGE OF PCM?

| | |
|---|---|
| A) Evaluation | |
| B) Financing | |
| C) Indicative programming | ✘ |
| | |

### 6-WHAT ARE THE THREE FOUNDING ELEMENTS OF THE FIRST PHASE

| | |
|---|---|
| A) Who we are - What we can share | ✘ |
| B) Who we are - What we do | |
| C) Who we are - What we measure | |
| | |

### 7-WHAT IS THE COMMON THEMATIC FRAMEWORK?

| | |
|---|---|
| A) It's a painting | |
| B) It is the sum of the quantitative indicators | |
| C) It is the representation of the shared context of the partnership at the beginning of the design process | ✘ |
| | |

### 8-WHAT IS A STAKEHOLDER?

| | |
|---|---|
| A) It's an organisation I know | |
| B) It is an organisation that has an interest in relation to the topic of my project | ✘ |
| C) It is an organisation that is a partner of my project | |

**PLANNING**

This workshop is a crucial moment in the whole project design process and requires careful planning in particular in relation to the timing of the moments of work in group. It is important that the trainer oversees the work done in each group and that each group shares after the exercise the work done with the rest of the participants.

**TRAINING CONTENTS OF THE MODULE**

The session focuses on the identification phase and on the seven steps guiding the groups through the project design process. By adhering to the outlined steps, you'll begin the day with a set of challenges related to a specific theme and conclude with a strategic plan to address them effectively. This plan will encompass objectives, anticipated outcomes, and activities.

# PHASE 2 - IDENTIFICATION



## WHAT NEED IS TO BE TACKLED?
## WHAT OBJECTIVES AND STRATEGY?
## WHO WILL BE THE ACTORS?

In this phase, the main elements of the joint project are defined and the actions to be undertaken are further analysed.

This is done through consultations with all the relevant actors (stakeholders) in the school and in its local context that could benefit from the project and its achievements.

At this stage, the project planning process is based on the Logical Framework Approach (LFA or Results Based Management - RBM), which originated in the development cooperation sector in the 1960s and has been adopted by the European Commission, in a different form depending on the areas of intervention, since the early 1990s.

In short, it is a system that allows the actors in the process to identify and analyse the relevant issues and problems and to define the objectives and activities that need to be carried out to solve the identified problems.

## STEP 1  CONSIDER ALL THE PROBLEMS SPINNING AROUND THE THEME
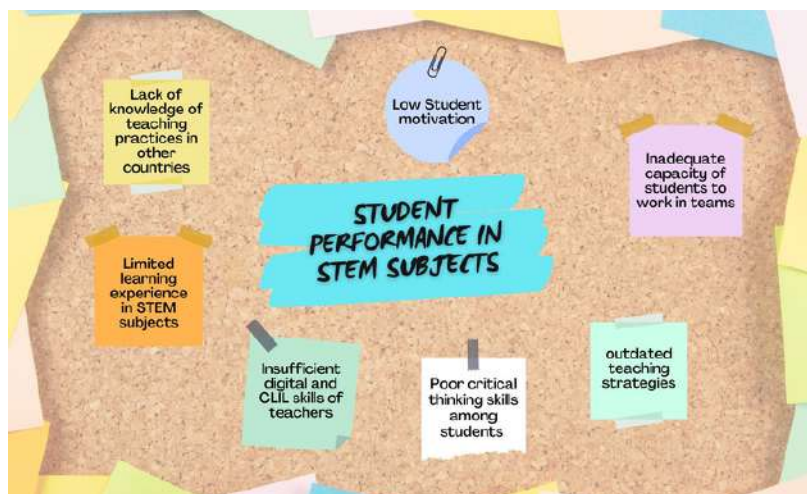


The problems identified at this stage must be

- real, i.e. based on concrete facts and not on ideas or opinions,
- objective, i.e. based on certain and demonstrable facts,
- expressed in negative terms, i.e. representing current negative conditions and not solutions,
- clear, i.e. understandable by all,
- specific, i.e. referring to precise aspects or elements.

## STEP 2  FOCUS ON THE MOST RELEVANT PROBLEM TO BE TACKLED

After having identified all the problems that exist in a given situation, one focuses on the main one to be addressed.
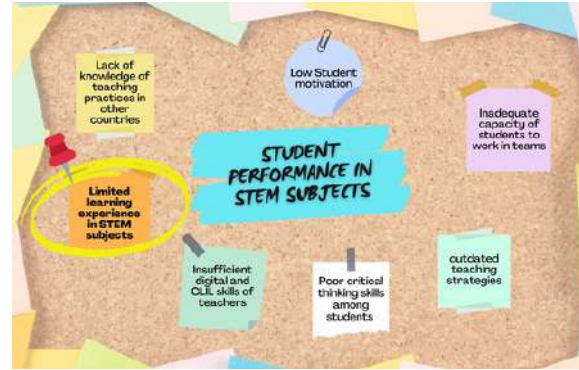


## STEP 3  ANALYSE CAUSES AND EFFECTS
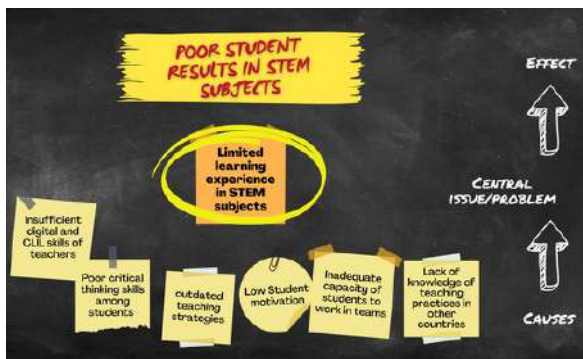


The tree of problems is a depiction of reality with all its negative elements. To construct it, one chooses a problem to start with, and then identifies causes (located at the lower level) and effects (located at the upper level) of the first problem.



## STEP 4  TRANSFORM THE PROBLEM INTO OBJECTIVE AND THE CAUSES INTO RESULTS (TREE OF THE RESULTS)

By reframing the problems into achievable goals, the positive aspects are presented.
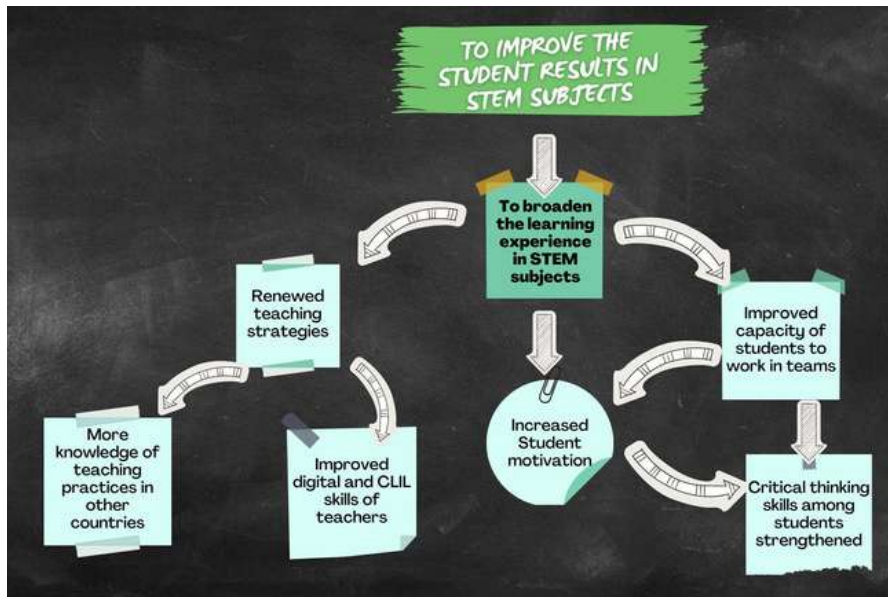


## STEP 5 — LET'S START DEFINING OUR STRATEGY

At this point, it is unlikely that the project will be able to intervene in all the areas on the problem/objective tree due to lack of means or human resources or lack of expertise. It is necessary at this point to define the true dimension the project will have and the intervention strategy.
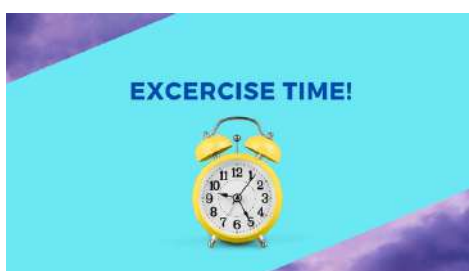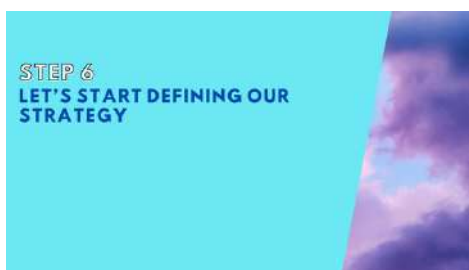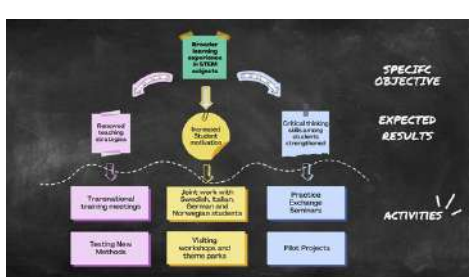
## STEP 6 — DEFINE WHICH ACTIVITIES ARE NEEDED TO ACHIEVE THE RESULTS.

In the last phase, the specific activities that can be implemented and that will produce the expected results will be defined.

The last aspect to be considered in the identification phase is to link the project idea with the right funding opportunity.

### OPERATIONAL PROGRAMME

| | | |
|---|---|---|
| **8 minutes** | THE IDENTIFICATION PHASE SERVES THE NEED<br>1 To focus on the central problem to be tackled<br>2 To relate and analyze the different causes of the problem(s)<br>3 To design a coherent need-driven strategy | Introduce the key elements at the basis of the phase by illustrating the three aspects. |
| **10 minutes** | STEP 1 CONSIDER ALL THE PROBLEMS SPINNING AROUND THE THEME | Depending on the time you have at disposal you can introduce each step individually or present them together. For example Step 1 and Step 2 can be presented together. |

| | | |
|---|---|---|
| **30-45 minutes** |  EXCERCISE TIME! | Ask the participants to continue the work in the same groups there were created for the previous phase. Here the objective is to start reflecting on the problems spinning around the theme and identify the main one. TIP! The common thematic framework the groups worked on in the previous session should help in identifying the problem. |
| **10 minutes** |  STEP 3 ANALYZE CAUSES & EFFECTS | Present Step 3 and Step 4. Here the objective is to explain how to build the tree of problems after analysing causes and effects. |
| **45-60 minutes** |  EXCERCISE TIME! | Resume the group work and ask them to build the tree of problems. TIP: Ensure that the participants have enough time to discuss and agree on a common tree of problem as this is a key moment in the whole process. |
| **10-15 minutes** |  STEP 6 LET'S START DEFINING OUR STRATEGY | Present Step 5 and Step 6. Here the objective is to explain how to build the tree of objectives and defining the strategies for achieving the project objectives. |
| **30-45 minutes** |  EXCERCISE TIME! | Resume the group work and ask them to build the tree of results and following that to identify possible strategies in terms prioritized of expected results and objectives. |
| **5-10 minutes** |  | As a final step you should introduce the theme of the identification of the activities. Explain the importance of defining/choosing the right activities in order to achieve the expected outcome. |

| 30-45 minutes |  | Resume the group work and ask the participants to identify at least 1-2 activities for each expected result. |
|---|---|---|
| 15-20 minutes |  | Introduce the logical framework by explaining the four columns<br>• Strategy<br>• Indicators<br>• Sources of verification<br>• Assumptions |
| 30-45 minutes |  | Resume Group work and ask the participants to identify at least one indicator for the activities and one for each expected result. Following that ask them to identify the sources of verification. |
| 5 minutes | | The session is closed by illustrating the key aspects addressed during the day. |
| 5 minutes | | Carry out the online evaluation |

## EVALUATION OF THE LEARNING ACTIVITY

| 1-THE IDENTIFICATION PHASE HELPS US TO | |
|---|---|
| A)  Analyse a problem and define a strategy | ✘ |
| B) Carry out the ex-post evaluation of the project | |
| C) Complete the application form | |

| 2-THE TREE OF PROBLEMS IS A USEFUL TOOL | |
|---|---|
| A) To define the budget in detail | |
| B) To analyse the causes and effects of the main problem to be addressed | ✘ |
| C) To divide the roles in the project | |

| 3-IN THE TREE OF OBJECTIVES | |
|---|---|
| A) The problem is transformed into an objective and the causes into results | ✘ |
| B) The causes are transformed into an objective and the problem into effects | |
| C) The causes are transformed into an objective and the activities into effects | |

| 4-IN THE FRAMEWORK OF THE PROJECT, THE GENERAL OBJECTIVE REPRESENTS | |
|---|---|
| A) The final expected result of the project | |
| B) What the project contributes to achieve after the achievement of its specific objective(s) | ✘ |
| C) Objectives of collective interest | |

| 5-THE PROJECT STRATEGY INCLUDES | |
|---|---|
| A) General Objective, Specific Objective and Expected Results and Activities | ✗ |
| B) Budget, expected results, partners, activities | |
| C) Needs, general objective, specific objective, causes | |

| 6-THE INDICATORS ARE | |
|---|---|
| A) Metrics that signal the progress of a project in a specific area | ✗ |
| B) The description of the main problem to be addressed | |
| C) The content of the project activities | |

| 7-WHAT ARE THE FOUR ELEMENTS (COLUMNS) THAT MAKE UP THE LOGICAL FRAMEWORK? | |
|---|---|
| A) Strategy, Indicators, Needs, Parts of the form | |
| B) Activities, Partners, Indicators and assumptions | |
| C) Strategy, Indicators, Sources and assumptions | ✗ |

## CONCLUSIONS

Train the Trainer Manual PCM" offers a valuable planning resource for those responsible for international activities in schools, particularly within the context of Erasmus projects. This manual will guide project teams through the initial phases of the project cycle, incorporating essential planning principles. By doing so, PCM contributes to the success and impact of Erasmus projects, ultimately strengthening schools' ability to act internationally while promoting school development and excellence in education.

# BE+ BE+ PROJECT
## BUILDING CAPACITY FOR ERASMUS+ IN SCHOOL EDUCATION

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