

survival kit

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**Managing Multilateral Projects
in the Lifelong Learning Programme**



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Survival Kit. Managing Multilateral Projects in the Lifelong Learning Programme

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Chapter 4: Getting the Project Started

The starting phase of a Multilateral Project is crucial for the further course of the project. That is why a whole chapter is dedicated to it. A project co-ordinator needs to make a number of decisions in the first few months of the project regarding the initial project plan, the project organisation and the allocation of roles and responsibilities. Furthermore the project's relationship to its environment needs to be analysed and system for management and communication set up. The starting phase culminates in the kick-off-meeting, when in many cases partners come together for the first time and need to agree on the cornerstones of the Multilateral Project.

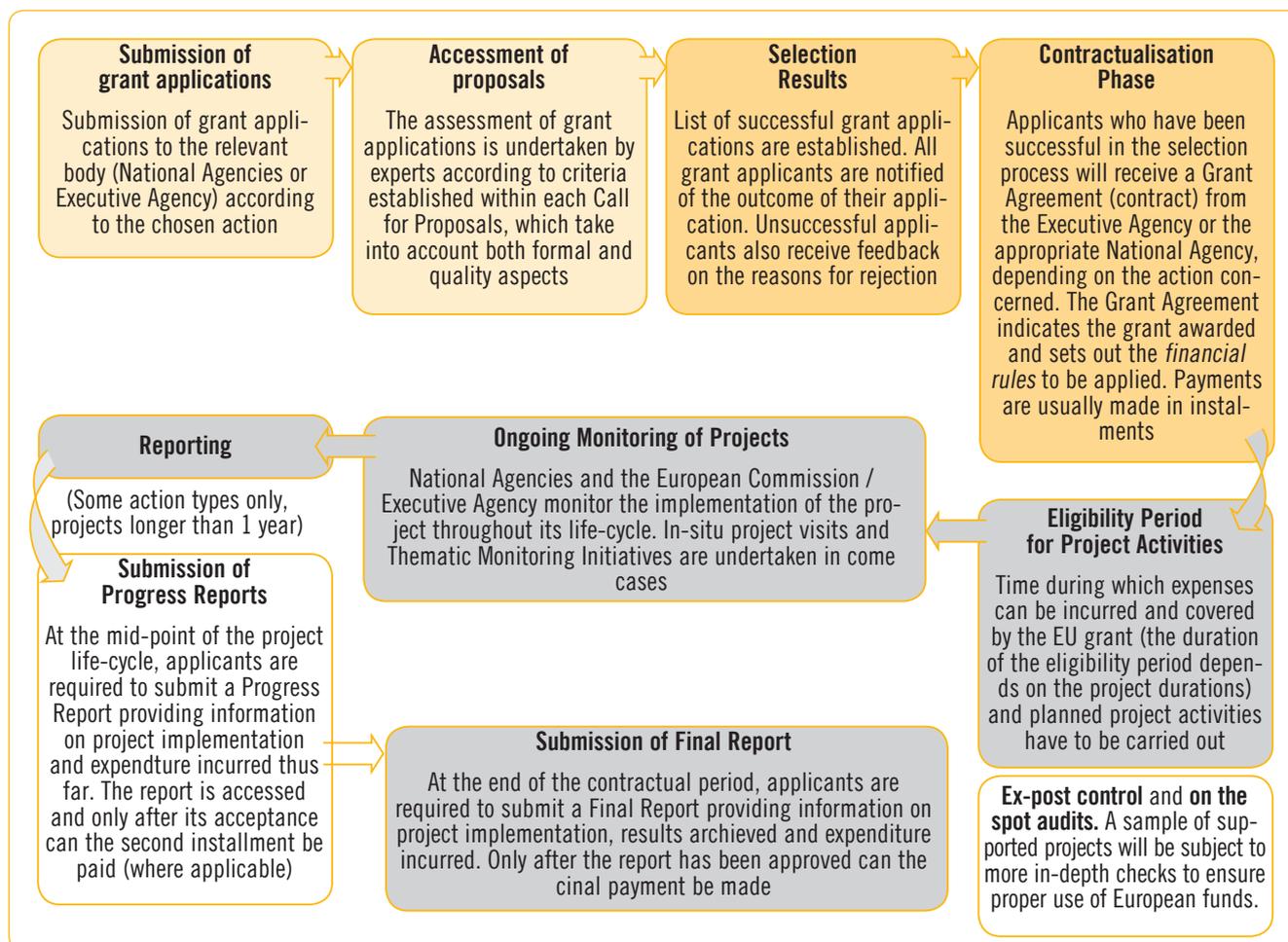
1. Tasks in the project start-up phase

Between the finalisation of the project plan, the completion of the project proposal and its submission to the funder there is a period of several months, as the upper row of the administrative cycle of Multilateral Projects in Box 1 illustrates.

Once the Multilateral Project is selected for funding the main task of the project co-ordinator is to get the project started. The starting phase is a crucial stage, as the arrangements made here determine the course of the whole project.

Projects require their own organisational format which is distinct from the organisation of the institutions involved. It is this

Box 1: Administrative cycle of Multilateral Projects in the Lifelong Learning Programme
(Lifelong Learning Programme (LLP): Guide 2009. Part 1: General Provisions, p. 14)



specific project organisation which needs to be built into the first phase of the project. Project organisation involves:

- A defined team in which each member has a clear role
- Organisational structures for communication, collaboration and decision-making
- The emergence of a project culture built on shared values, agreed rules and conduct
- A corporate design (project logo, presentation guidelines etc.)

The main project management tasks to get the project started along the right lines include the following:

- Review and refinement of project plan
- Analysis of the project environment
- Definition of roles
- Creation of sub-groups (work package plan)
- Setting-up of a communication system
- Organisation of the kick-off meeting

A short, informal checklist of the most important steps to take in the start-up phase of a Multilateral Project – developed for Erasmus, but also valid for other actions – can be found at: http://eacea.ec.europa.eu/llp/erasmus/documents/guide_lines_for_llp_coordinators_project_start_up.pdf

2. Reviewing the project plan

One of the first things to do for a co-ordinator at the start of the project is to look again at the original project plan, which is now the basis of the Grant Agreement. In almost all projects the original plan needs to be reviewed, adapted and refined. This review may include the following aspects.

Project aims:

How operational were the project aims as originally formulated? Are they concrete enough to assess the level of achievement later on? Can they be measured or otherwise verified? Do the assumptions on which these aims were formulated (still) hold true?

Perhaps some of the project aims will have to be modified in the course of the project's implementation. But co-ordinators of Multilateral Projects in the Lifelong Learning Programme should be aware that modification of aims is possible only to a certain extent. The project was selected on the basis of the aims described in the project proposal. If adaptation is necessary, this may only mean clarification and refinement without altering the substance of the project.

Envisaged products:

Another refinement in planning will normally concern the project products. In the project proposal the educational products to be developed may have been described only in general terms and need now to be more detailed. Project managers should be aware that Multilateral Projects are strongly product-oriented. The range, nature, volume, or language versions of products must not be changed without prior consent of the funder.

To produce and discuss in detail at the kick-off meeting a revised list of deliverables (cf. Box 2) can be useful in ensuring that all partners have a complete and clear picture what has to be produced by the project, and when, how and by whom.

Project budget:

The budget of the overall project and the partners' share of it were fixed in the project proposal but the budget approved by the funder might well have been reduced. If this is the case the project has to re-do the whole scoping process with the reduced budget – or leave it altogether. A budget cut needs to be reflected in the internal budget allocation both between partners and between cost items. It is crucial for the development of trust in the partnership that such financial modifications are fairly shared and communicated with full transparency.

Allocation of tasks:

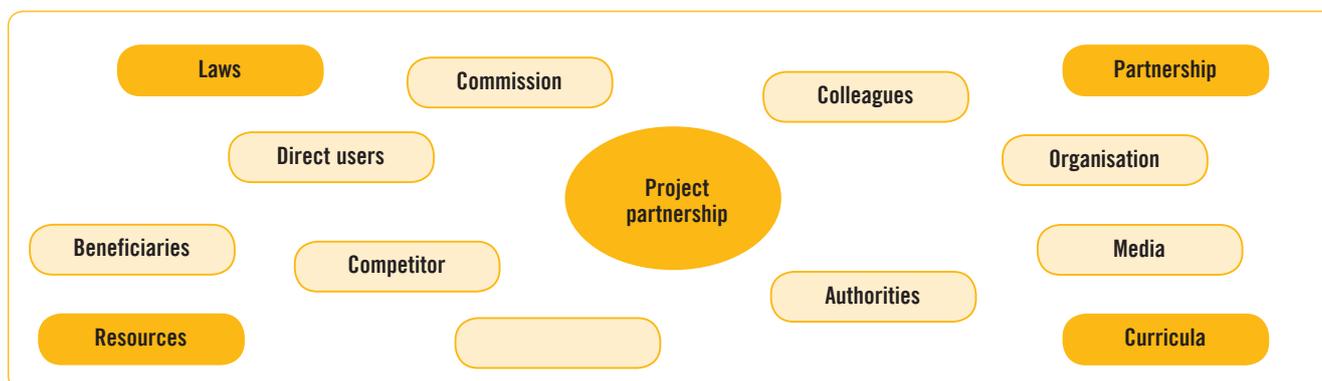
Very often tasks allocated to partners in the project proposal have to be revisited. Perhaps because of a budget cut as described above, or because the staff involved have changed or simply because the partners consented to a provisional division of tasks without thinking much about it. It is useful to go again through each work package as described in the proposal, discuss, confirm and if necessary re-allocate some tasks at the kick-off meeting. Project co-ordinators should show some flexibility here as task modifications can help partners to find their correct place in a project. This process therefore has an immense impact on motivation and the sense of ownership.

3. Analysing the project environment

A project manager might (and indeed should) have done an initial risk analysis in the pre-project phase (cf. *Chapter 3: Planning a Multilateral Project*), but few projects do a thorough analysis of the project environment before the project is

Box 2: List of deliverables

No.	Description of deliverable	WP leader	Contributors	Deadline
D1	Virtual platform for communication and learning Virtual platform to facilitate the preparatory and follow up phases of the test course and the Grundtvig training course, including a collection (links + comments) of ICT tools for networking and network management Language: EN Medium: Internet platform	Partner 1	Coordinator Partner 2 Partner 3 Partner 4	31.5.2010
D2	Course design A document for trainers which will contain the curriculum, the overall didactic approach and the methodologies to be applied in the course. It will cover all three phases. Preparatory phase, face-to-face-course and follow-up. Language: EN Medium: PDF document Volume: 30 pages	Partner 3	Coordinator Partner 1 Partner 2 Partner 4	31.3.2010 (Draft) 31.5.2010 (Final)
D3				
D4				
D5				

Box 3: First brainstorming of possible influencing factors

Box 4: Assessment of influencing factors

Influencing person / institution / factor	Type of potential influence	Character of influence ☺ ☹ ☹	Importance of the influence rated 1 – 5	Steps to be taken

selected for funding. If it has not been done before the starting phase now is the time to do it! The social as well as the factual environment needs to be analysed.

Firstly the potential social and factual factors should be collected in a brainstorming exercise.

In a second step these factors can be weighed and the most important ones selected for more detailed analysis. For the most important influences measures to make the most of positive factors and risk-reducing action for the negative factors should be devised.

Another possible and somewhat shorter alternative to this process is a SWOT analysis.

Box 5: SWOT analysis

S (strengths are internal)	W (weaknesses are internal)
O (opportunities are external)	T (threats are external)

4. Defining project roles

In most Multilateral Projects the author of the successful project proposal is identical with the project co-ordinator. But this may not be the obvious solution in all cases. Writing a project proposal is something quite different from managing a project.

In formal terms, the project co-ordinator needs to be appointed by the legal representative of the contracting organisation. In some larger institution this is a formal process of appointment which takes some time and needs preparation. To have a job profile of the co-ordinator ready can be useful. The competences to look for in a project co-ordinator have been described in *Chapter 2: Project Co-ordination: Management and Leadership*.

It is good practice, as many experienced project co-ordinators will confirm, to share the co-ordination tasks in a small management team rather than allotting multiple functions to one person. Project co-ordination in a narrow sense includes:

- Managing and leading the project team
- Steering the product development
- Monitoring and controlling
- Financial management
- Promoting the project in the (educational) public

These multiple functions can rarely be found in any one person. Moreover, to share co-ordination tasks has the advantages of:

- Substitution in times of absence
- Making use of the specific know-how in an institution
- Alleviating stress by spreading responsibility

It is important however, even if the work of co-ordination is shared by a team, that one main co-ordinator is designated who acts as the figure head and spokesperson for the project.

Project co-ordination is a vital role in a project, but of course not the only one. There are several types of roles team members can play in a project:

■ Roles with regard to the project organisation:

Coordinator, administrator/controller, assistant, quality manager/evaluator, steering committee member, work package leader, work package contributor

■ Roles with regard to the project tasks:

Content developer, teacher/trainer, researcher, ICT support, promoter/disseminator, graphic designer

■ Roles with regard to personalities:

Entrepreneur, Networker, Visionary, Critic, 'Labourer'

■ Roles with regard to team functions

Meredith Belbin

(http://www.belbin.com/content/page/1971/Belbin_Team_Role_Descriptions.pdf) describes nine team roles, which are evident in successful teams. These roles can be taken up or dropped and one person can play different roles in different situations. These team roles are:

- **The chairperson/co-ordinator** ensures that the team members' efforts and strengths are put to good use
- **The shaper** makes the team look at where it is going – its objectives and priorities – and tries to keep the team activity focused
- **The company worker/implementer** turns the ideas and plans into practical tasks that people can actually get done
- **The completer/finisher** checks the details ensuring nothing is overlooked and no mistakes are made, also keeps an eye on time, deadlines and accuracy
- **The innovator/planter** suggests new ideas and creative solutions, identifies new opportunities and sees problems as opportunities
- **The monitor/evaluator** evaluates ideas objectively to see if they are realistic and profitable. Can interpret and evaluate complex issues
- **The resource investigator** keeps the team in touch with what is happening outside the team. Learns about ideas, information, developments in the outside world
- **The team worker** encourages others, helps others out and is sensitive to people's needs and feelings
- **The specialist** has specialist knowledge or experience to contribute to the team

The art of good project management is to be aware of the different role dimensions and to take them into consideration when putting project teams or sub-teams together. European projects are not hierarchical undertakings. In fact, the extent to which a co-ordinator can steer by command is extremely limited in such virtual and dispersed teams. Projects live or die by the motivation of their team members. So independent of one's preferred management style it is indispensable to let people have a say and allow them find their right position in a project. All project members should get a chance to find the place where they feel

most comfortable and can bring in to the maximum extent their specific know-how, working styles and personalities.

Moreover, unlike in-house projects where the project leader can select the members of the project team, in most Multilateral Projects the partner institutions will simply appoint the person(s) they deem most appropriate. And this person may be somebody completely different from the person the co-ordinator was in contact with in the application phase.

Ideally a project team will combine four different types of competences:

- Expertise in the subject area
- Social competence
- Project management skills
- Decision-making authority
- User competence with regard to ICT

Expertise in the subject area: The project team as a whole needs to have the necessary professional expertise and knowledge of the field concerned as well as the methodological and technical skills required.

Social competence: The ability to work independently and in teams is crucial.

Project management skills: Not only the co-ordinator should be a good project manager, also the partners should also have basic project management skills.

Decision-making authority: It is extremely helpful to have people from the partner institutions in the project team who have decision making powers that can be used (for example) in project meetings. If this is not the case delays of the project's work may take place while decisions are made elsewhere.

ICT user competence: A reasonable understanding and positive attitude towards ICT- based communication and co-operation tools is necessary, as a large part of the work will be done virtually. It is difficult (but still not rare) to do a project with people who refuse to use anything but email.

Roles and responsibilities of the main team members should be discussed at the start of the project and at the end of the discussion written up in a role description sheet (Box 6).

Box 6: Defining roles and responsibilities

Team member	Role(s) in the project	Main Responsibilities

5. Organising the work into sub-groups

Due to reasons of effectiveness and efficiency it does not make much sense if all aspects of the Multilateral Project are done by the entire project team. Partners have different strengths, expertise and interests, and this should be reflected in the organisation of the work programme.

Sub-groups can be formed according to tasks (work packages) or thematic aspects (interest groups). In some projects it may even make sense for practical reasons to form some sub-groups according to geographical vicinity (less travel time and costs). Other projects will have the division between a steering group at European level, and attached national teams which develop or test content.

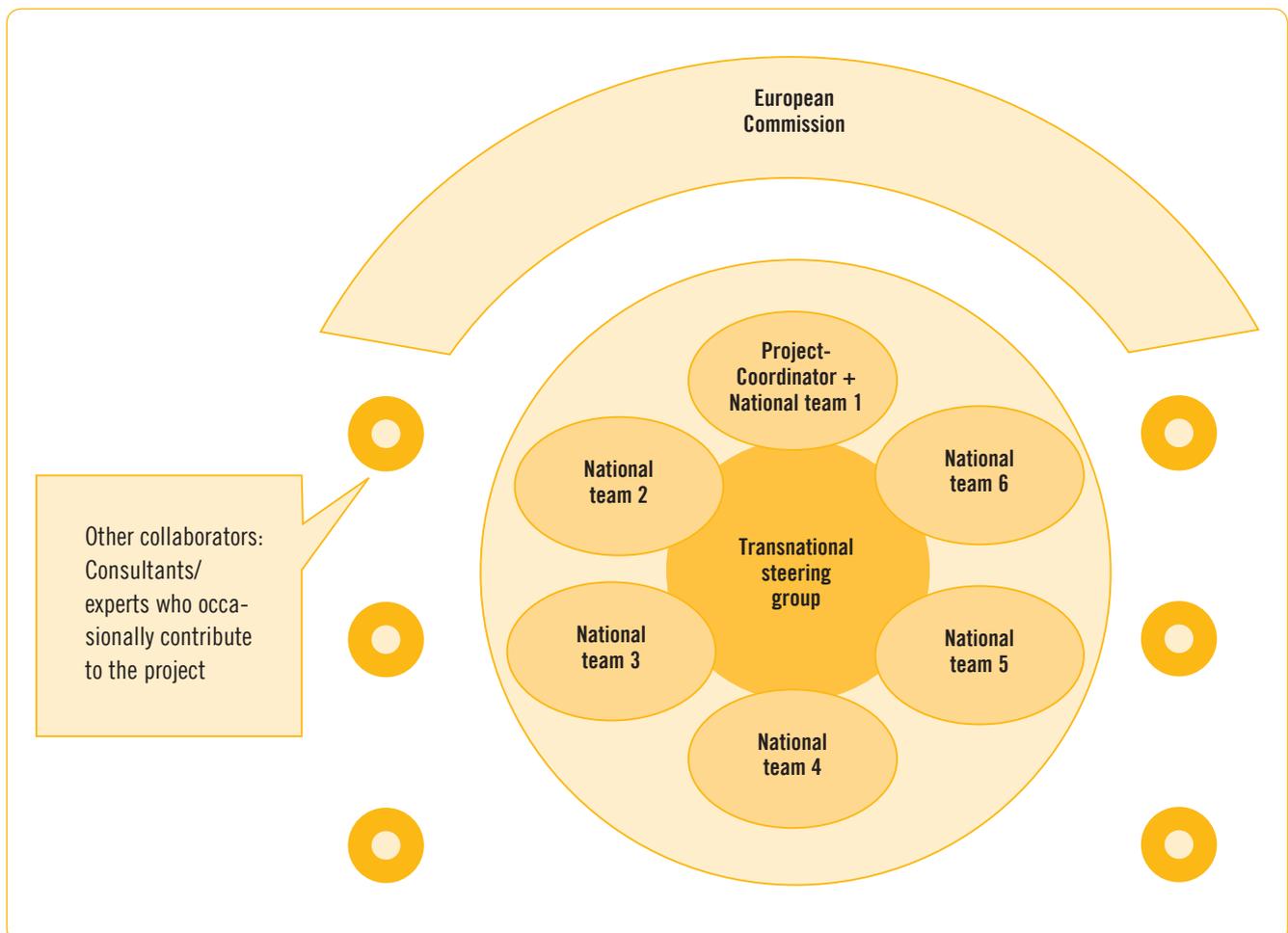
Box 8 shows the complexity of relationships in a large Multilateral Project, and their interaction with the social envi-

ronment of the project. It also illustrates the need for a well established and effective communication and information system which supports the whole process and ensures that the co-ordinator (or co-ordinating team) can receive all information.

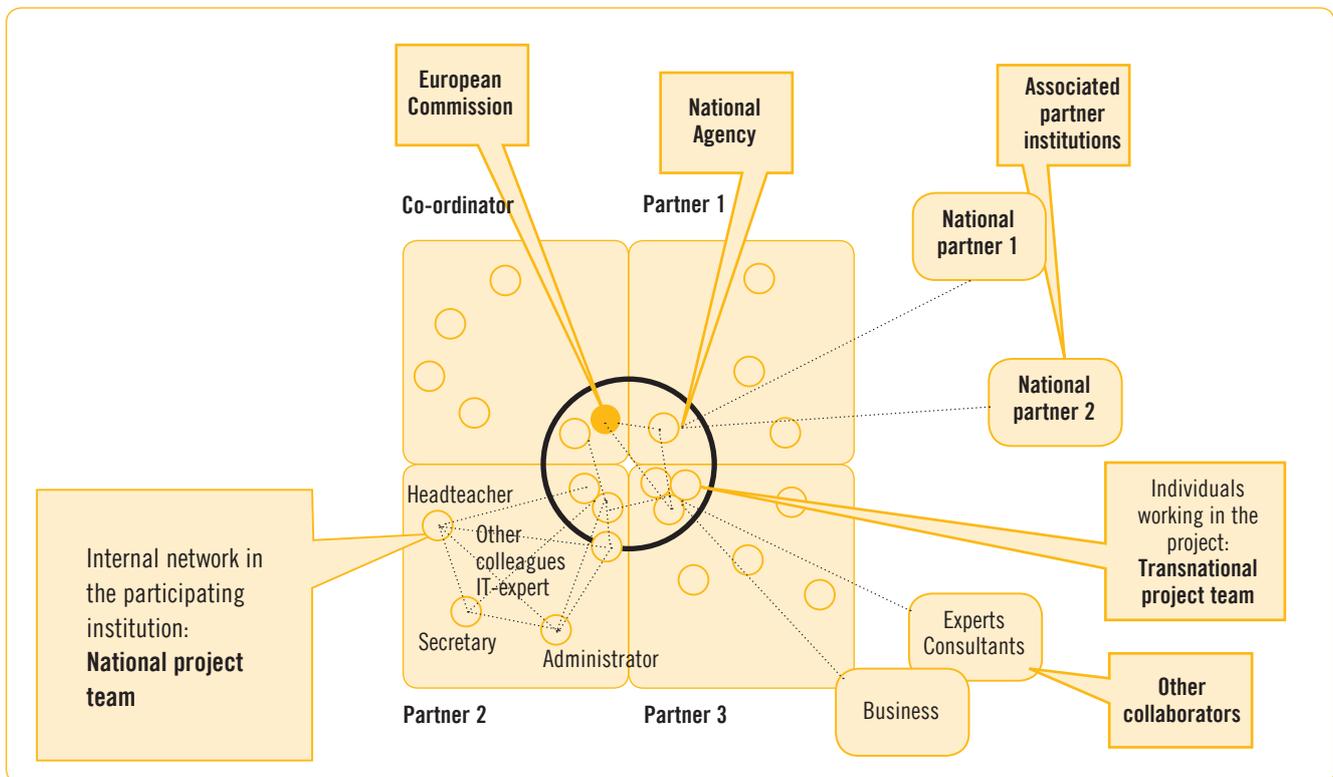
It is not always easy to staff thematic sub-groups or work package groups in a project, even though tasks and responsibilities have already been allocated at the application stage. This was many months ago, and the project co-ordinator cannot take for granted that the project partners remember what they are supposed to do, or have even read the project proposal carefully enough to appreciate what they formally consented to do in the project. This is why the definitive task allocation should be discussed in detail and, in many cases, modified at the kick-off meeting. This makes each team member aware of what is expected from them and avoids misunderstandings.

In larger Multilateral Projects, it is usual to use thematic or functional groups with national sub-groups feeding in (Box 8).

Box 7: Possible structure of a Multilateral Project (1)



Box 8: Possible structure of a Multilateral Project (2)



This task allocation should be done on the basis of the work packages as described in the project proposal. A tool which may be useful to establish clarity about tasks is a work package form which describes in some detail the most important aspects of each work package (Box 9).

These work package forms should not be filled in by the project co-ordinator but by the work package leader and, if possible, the work package team together. This is not only a more participative approach, it also provides the project co-ordinator with a clear idea of the way the project team members interpret the other planning documents. Moreover, when asking work package groups to organise themselves the co-ordinator sends a message to the partnership: Partners are invited to bring in their ideas, but also to take over responsibility for their work.

6. Setting up the management system and procedures

The two essential elements of a management system of a Multilateral Project are the project co-ordination (team) and

the European steering group. The latter consists of one or two representatives of each partner institution, is mainly responsible for co-ordination, monitoring and evaluation, and further planning. Each national team has (at least) one representative in the steering group. For this the group normally meets two to three times a year. An internal evaluator or quality manager should also be part of the management system.

An optional element of a management system can be the establishment of an advisory board, this can also create added value in some projects. Such a board can give feedback, make recommendations, and play a role in dissemination.

Another task is the definition of the decision-making process:

- What does the coordinator decide?
- What does the steering group decide?
- By majority or consensus?

It is not always clear if the members of the steering group have decision-making authority and can decide things in one of their meetings. Sometimes they have to report back to their home institutions first. It is a common reality in European projects

Box 9: Work Package Planning Form

Title work package:		Work package leader:		
Duration:		Work package team:		
Aims and objectives				
>				
>				
>				
Results / deliverables				
>				
>				
>				
Relation to other work packages				
>				
>				
>				
Costs				
Staff	Travel	Equipment	Subcontracting	Other
Tasks and responsibilities				
Task	Responsible	Deadline	Comment	
1.				
Task	Responsible	Deadline	Comment	
2.				
Task	Responsible	Deadline	Comment	
3.				
Task	Responsible	Deadline	Comment	
4.				

that the team members have very different status, ranging from post-graduate students to directors of large educational institutions.

To introduce and agree on a conflict resolution process is advisable. Clear prior regulations of *What happens if...?* are much better and often more adequate than trying to decide on a course of action when the conflict arises (cf. *Chapter 6:*

Effective Collaboration). In some large project and networks the appointment of a project ombudsman has also proved useful.

7. Establishing a communication system

Crucial for the success of a Multilateral Project is successful communication. Project communication has two levels:

Box 10: Example of an advisory board

In one Grundtvig project on validation of competences, for instance, the advisory board consisted of different stakeholders who had a strategic interest in the project topic. There were representatives from:

- Management of the co-ordinating institution
- The ministry of education
- One of the national umbrella organisations for adult education
- The National Agency
- A local university
- A thematically related project

The board met twice a year. In these sessions the co-ordinator gave a detailed account of the activities, achievements and challenges of the past months. After thorough discussions feedback and concrete recommendations were given by the members of the board. Their implementation was the subject of discussion at the next meeting.

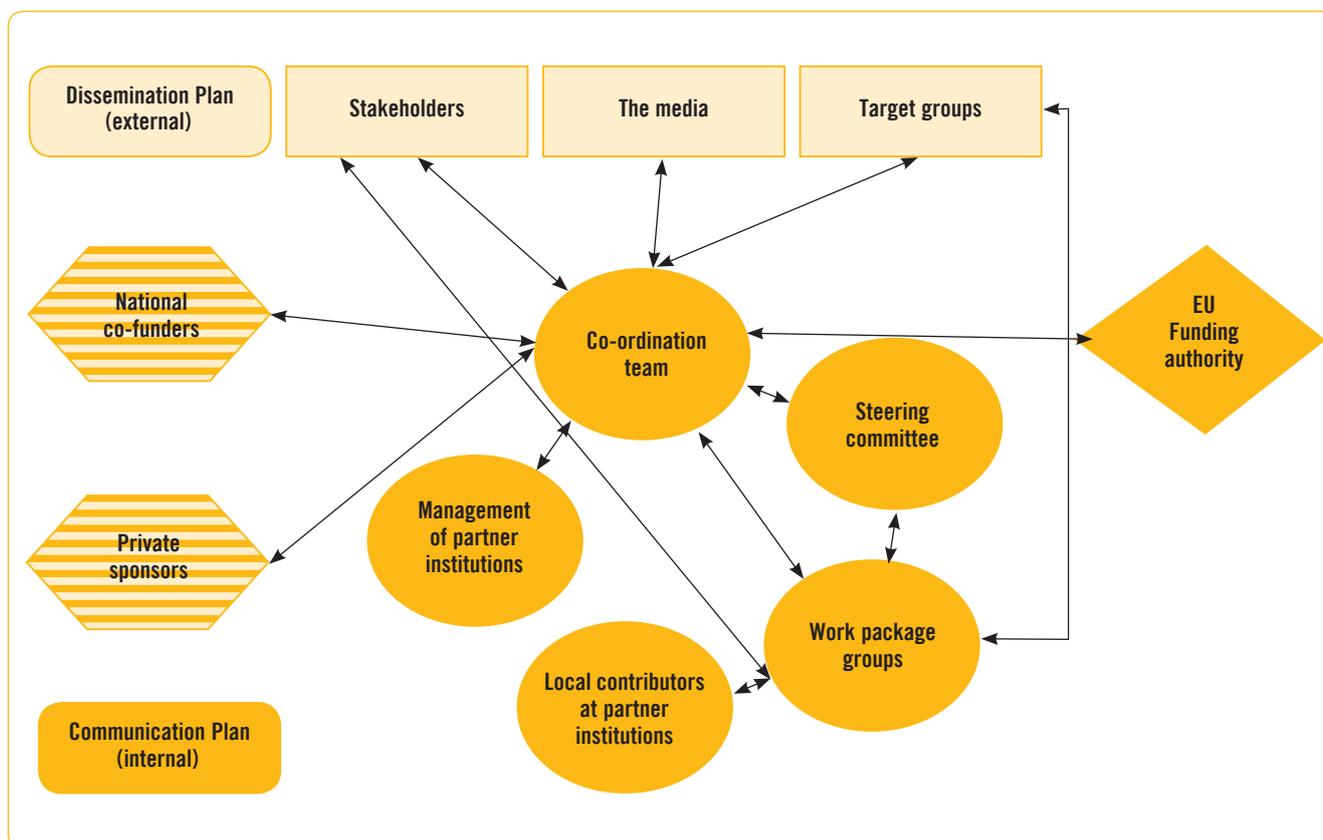
- Internal: communication between the different project actors
- External: communication with target groups, other stakeholders, and the media

External dissemination is dealt with elsewhere in this publication (cf. *Chapter 10: Dissemination and Exploitation of Results*), but is included in the diagram in Box 11 to give a complete picture of the potential communication relations in a project.

At the start of the project communication should be systematically planned.

To do so, six questions with regard to internal project communication should be carefully considered:

1. **Why communicate?** Communication is not an end in itself, but needs a clear **communication purpose**. What is the value of the communication activity in the context of the overall project? E.g. information, request for support, feedback etc.
2. **To whom?** Who exactly are the **addressees** of a communication activity? Different recipients need different communica-

Box 11: Communication relations in a project

Box 12: Internal Communication Plan

WHY? Purpose of communication	TO WHOM? Recipient of communication	WHAT? Content of communication	HOW? Media of communication	WHEN? Timing and frequency of communication	BY WHOM? Responsibility of communication

tion strategies and styles. E.g. co-ordination team, steering group, management of partner institutions etc.

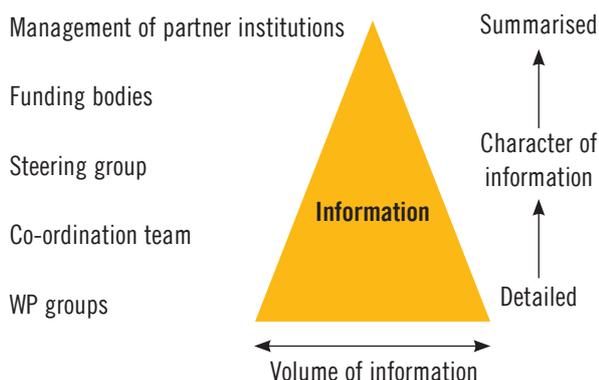
- What?** Project communication should not mean forwarding a bulk of information to everybody, but a **selection** of information according to the communication purpose and information needs of the addressees. E.g. Results of a meeting, draft products, invitation to event etc.
- How?** What are the most suitable communication **methods** for specific communications? Is face-to-face or virtual communication appropriate? Which **tools** are most suitable (cf. *Chapter 8: ICT Tools for European Project Work*)? E.g. face-to-face meetings, Skype conference, e-newsletter, minutes, etc.
- When?** How often and with what frequency should be communications be sent? E.g. after each transnational meeting, quarterly, at project milestones, etc.

- By whom?** Who has the **responsibility** to make sure that planned communication activities are implemented? E.g. project co-ordinator, work package leader, etc.

A communication plan with answers to these questions helps to keep track. It should be discussed and agreed at the kick-off meeting.

One frequent phenomenon seen in many Multilateral Projects is that too much and insufficiently filtered and prepared information is distributed. Such an overkill of information may arise from the good intention to spread knowledge liberally and be transparent. Yet it can endanger the project's success, as it tends to de-motivate project actors.

As a rough guideline the pyramid of information needs should be considered.

Box 13: Information needs in a project**8. Organising the kick-off meeting**

The importance of the kick-off meeting for the further development of the project cannot be over-rated. It is of vital importance to all that follows in a project. Consequently, it should be planned with extreme care.

The kick-off meeting has multiple functions. It serves to:

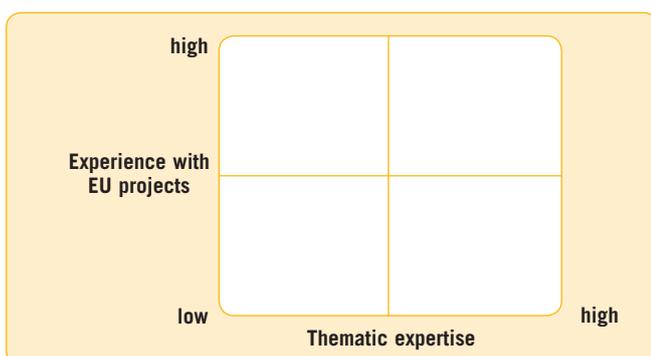
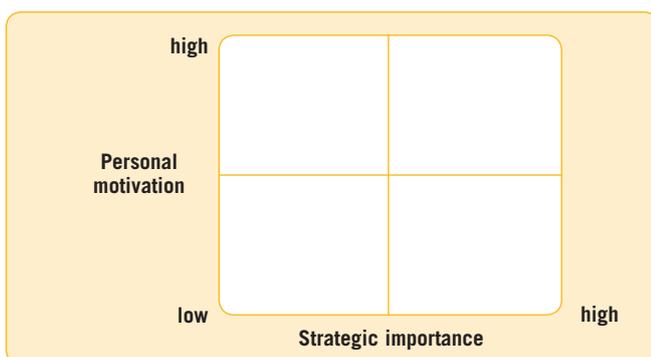
- Get to know each other as people, professionals, and institutions
- Provide full information about all aspects of the project
- Create transparency and build trust in the partnership

- Evoke identification with the project and a sense of ownership
- Be the first step in the team-building process
- Confirm roles and tasks
- Create clarity about financial and administrative regulations
- Plan the first project phase in detail

This is quite a lot to do in a meeting which should not be longer than two or possibly three days (bearing in mind the other commitments of the partners). A balance needs to be found between warming up and team-building, thematic discussion, confirmation of planning issues and information about financial and contractual issues. Examples of the agendas of kick-off meetings can be found at www.european-project-management.eu

A good start to a kick-off meeting has proved to be two mapping exercises which allow participants to get to know each other's personal and institutional backgrounds with regard to the project. Participants are asked to position a sticky dot on two diagrams on flip charts about motivation and interests with regard to EU projects and the topic at stake. Afterwards they explain their choice. Thus quite easily, and much more interestingly

Box 14: Mapping exercise: partners' backgrounds



than by formal PowerPoint assisted presentations of the partner institutions, a vivid picture of what partners expect from and can bring into the project will be gained (Box 14).

This warm-up exercise can be followed by a SWOT analysis of the project, a methodology which has been introduced as a risk analysis tool earlier in this publication (cf. *Chapter 3: Planning a Multilateral Project*). Good Practice with regard to kick-off meetings (according to experienced co-ordinators of Multilateral Projects) is also to:

Involve other partners in the programme of the kick-off meeting:

It is potentially very boring to listen to the same person for two days! Leaders of work packages should be invited to present the part of the project they are to be responsible for and facilitate discussion in the respective workshop.

Provide comprehensive project documentation:

Some project managers produce a project manual for the kick-off meeting. It contains all relevant contractual documents, planning documents, forms and templates to be used in the project.

Apply a variety of meeting formats:

Working in a plenary session for the whole meeting can become exhausting and unproductive. In an educational project it could be expected that different formats and activities will be applied – but this is still the exception rather than the rule!

Dedicate enough time on contractual issues without overdoing it:

The contract with the funder, reporting and financial eligibility regulations, the provisions of the partner agreement and all its annexes should be present and discussed in detail. It is crucial that everybody understands the formal framework of the project. But at the same time the project co-ordinator must take care not to put people off with administrative matters. In any case it is not a good idea to start a kick-off meeting with contracts and finances.

Ask explicitly for agreement on important issues:

When the terms of the partner agreement, reporting requirements, budget allocation and payment methods and the revised work

plan with roles and tasks of each partner have been sufficiently discussed, partners should be asked for their agreement. The co-ordinator should at this stage give partners time for second thoughts (perhaps one week after the meeting). If nobody disagrees after this time these cornerstones of the project are considered to be officially accepted and an integral part of the partner agreement. The meeting minutes should confirm this agreement.

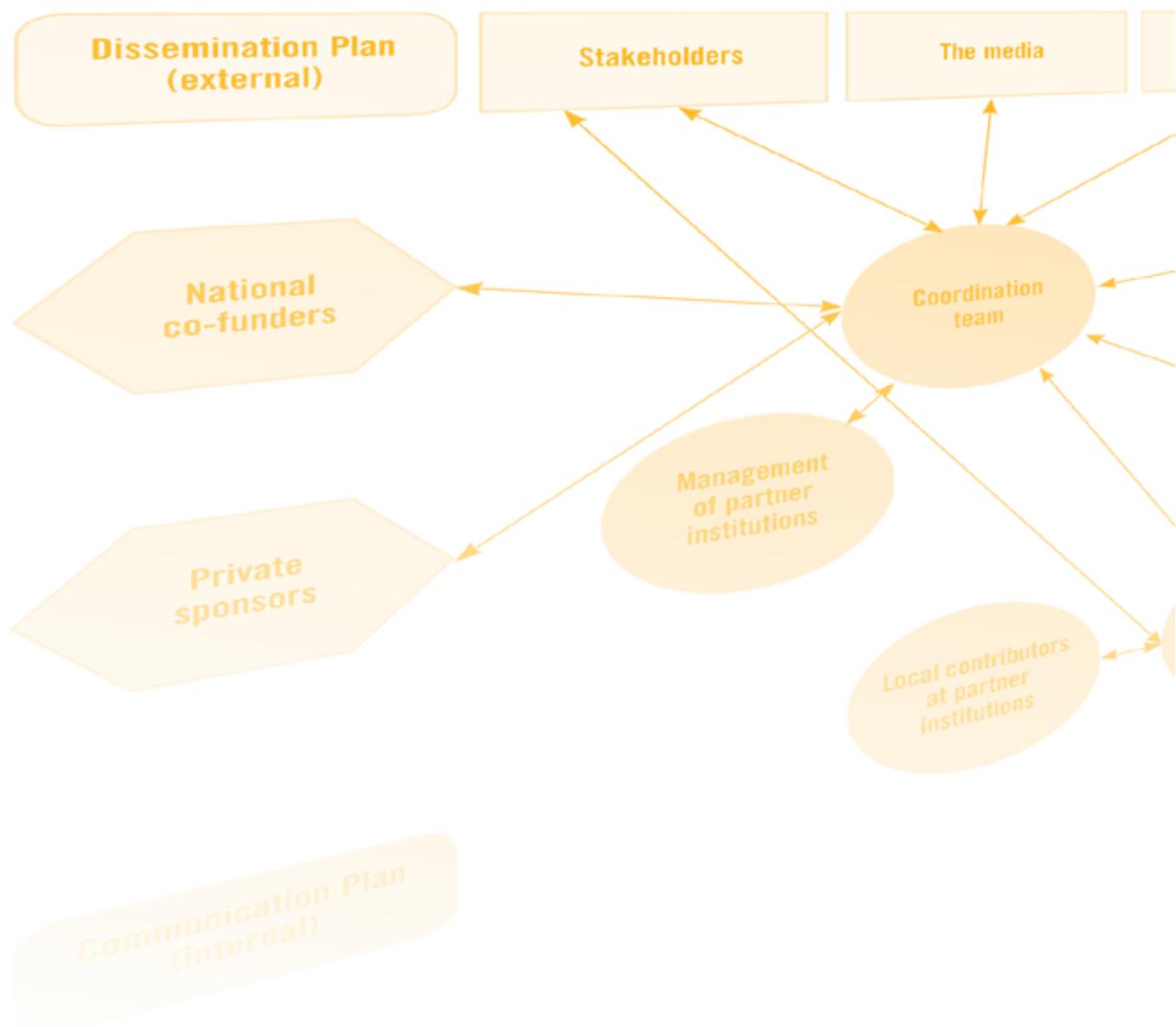
Make people laugh and have a good time:

Finally a European project should be a positive contrast to daily routine. Good meals and inspiring social activities help to evoke

a positive spirit in the partnership which can be a great asset in the future.

Apart from these specifics for the kick-off meeting the basic rules of good meeting management should of course be applied (cf. *Chapter 6: Effective Collaboration*).

All templates shown and described in this chapter can be downloaded at the *Survival Kit* website www.european-project-management.eu



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Multilateral Projects are a specific type of European co-operation in the EU's Lifelong Learning Programme. Several institutions from different countries work together to jointly develop or transfer, test and disseminate innovative education products. The *Survival Kit* supports co-ordinators in the complex task of managing these projects.