



Good and Bad Practices In the Area of Communication, Coordination and Cultural considerations

Germany, Greece, Poland

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Introduction

One of the project aims of “3 x C – Coordination, Cooperation, Cultural context – tandem learning program of transnational cooperation for SMEs” project is to offer an educational and training program applying the tandem learning concept that will increase skills and competencies of *Small and Medium Enterprises (SMEs)* in the area of project-oriented international cooperation.

This report is a compilation of good and bad practices in the area of communication, coordination and cultural considerations in transnational projects. They were selected in order to address one of the objectives of the project third workpage, i.e. identification of innovative practices to be transferred.

Making transnational cooperation work can be a real challenge. There are many possible problem areas. Different cultural background, language barriers, different working styles are first to mention. Sharing good and bad practices provides with real opportunities for acquiring knowledge about what works and what not. Benchmarking against others help to save time and find solutions at the first attempt or improve future actions.

The presented here practices are based on in-depth-interviews, conducted by the project partners, with institutions that have already participated and/or coordinated transnational projects. Thirty one institutions from Germany, Greece and Poland shared their experiences and lessons learned in preparation, design and implementation of international projects. Institutions identified issues in their projects and considered their nature and cause, the stage of a project cycle when the problem occurred. They also shared their solution and identified prevention tools. More specifically the institutions answered the following questions:

- What was the nature of the problem?
- What were the causes of these problems?
- Did the problems result from irregularity during the project’s implementation or from imprecise planning of the project (at the stage prior to submitting an application)?
- How were or how could be the problems resolved?
- What and when (in which phase) should be done to prevent such problems?

The report is organized in two parts that demonstrate respectively the good and bad practices. In part three, annexes present in details the interviewees' answers.

1 Good practices

1.1 Poland

1.1.1 SMART – good practice to evaluate project’s objectives

SMART is a mnemonic (a memory and/or learning tool) used in project management at the project objective setting stage. It is also a way of evaluating the objectives or goals for an individual project¹. SMART is an acronym that is widely used indicating five key characteristics of the objectives to help ensure that effective objectives or goals are set. According to that the goals should be (although the meaning of the letters used sometimes varies)²:

- S Specific/Simple (well defined, clear to anyone that has a basic knowledge of the project)
- M Measurable (to know if the goal is obtainable and how far away completion is, to know when it has been achieved) - progress towards objectives often need to be to be monitored; it is also very useful to know when the work has been done and the objectives are completed
- A Agreed Upon/Achievable (agreed with all the stakeholders what the goals should be)/ (realistic goal)
- R Relevant (within the availability of resources, knowledge and time) - objectives should also add useful value within the context where they are being set
- T Time bound (enough time to achieve the goal, not too much time, which can affect project performance) - descriptions of objectives should also include timescales of what is required by when

For more information and practical exercises please visit:

1. <http://www.projectsmart.co.uk/smart-goals-objectives.html>
2. <http://www.projectsmart.co.uk/use-smart-objectives-to-focus-goals-plans-and-performance.html>
3. <http://www.ala.org/ala/mgrps/divs/acrl/about/sections/is/webarchive/smartobjectives/writingmeasurable.cfm>

¹ www.wikipedia.org

² Based on the information available on <http://changingminds.org> and <http://www.projectsmart.co.uk>

1.1.2 First meeting – good practice to start the project

In a vast majority of international projects, meetings with partners are indispensable. Mail, phone, fax communication, videoconferences, however very helpful, would never replace face to face interaction when partners have the possibility to get to know each other better, specify their expectations, present arguments and misgivings. It is widely emphasized that the first meeting is especially important for team spirit building and impacts on team members' further motivation. As the proverb says: "tell me how your project starts and I can tell you how it ends".

There can be specified three main aims of the first meeting, namely:

1. The partners evaluate their ability to work together,
2. The project limits are specified in order to avoid disappointments,
3. The partners move on from what was only an idea to a truly joint project³.

Achieving the above goals requires a detailed plan which describes what should be done to assure the success of the meeting. It is said that the effectiveness and thus the success of the first meeting is directly proportional to the effort put into planning and preparing it. The scope of these preparations should be wide and should not be focused only on the discussion between partners but should comprise the meeting in its widest sense, namely all the factors and circumstances which can have an impact on the first meeting's quality (accommodation, social activities, etc.).

The main aim of this text is to present good practices concerning these preparations. The text may be treated as a guide for participants of an international projects who want to organize such a meeting. Text is divided into three parts: organizational matters, managing a meeting and follow-up of a meeting.

A. ORGANISATIONAL MATTERS

A general remark when preparing the meeting: try to get as much information as possible about your visitors. As a proverb says: "the devil is in the details" and such a small oversight like not taking into consideration the dietary requirements of the team members could pose unexpected problems, influence the atmosphere badly, and finally weigh upon the success of the meeting.

1. Date

Planning of the first meeting usually starts from setting its date. There it is important to take into consideration the differences between countries concerning the holiday periods (differences between orthodox and catholic countries for example). Moreover, different dates of the national/public holidays such as an Independence Day must be taken into account.

³ A Guide to practical approaches- Transnational cooperation in Leader +, 2003, p. 3

It is also important to gather information from partners about their holiday plans, so as to find a date which will be acceptable for all partners. One general conclusion is that the date of the first meeting must be based on a wide consensus and should not be just imposed by the coordinator or organizer.

2. Place

It is recommended to organize the first meeting in the coordinator's country *so that he/she can control arrangements and establish a model for the future*⁴. Moreover, it enables the team members to familiarize themselves both with his institution, and its capacities and with the coordinator's country's culture which could have an impact on the style of work imposed by the coordinator. But it is not advisable to choose for a meeting location a place which is very distant from some partners' countries as they may have problems with arrival or excessive travel costs.

3. Accommodation

Having fixed the date of a meeting and the place, it is possible to choose a place to stay for guests. Invited persons must feel comfortable as this could influence their motivation to work. Placing guests in a hotel is the best solution. The hotel itself should be located as close as possible to the meeting place, or it should have good and fast connections (e.g. by tube) so as not to waste time for journeys. The quality of the hotel will depend on the type of a project, persons invited and budgetary limitations, but three star hotels are most popular and widely acceptable.

The hotel must be booked well in advance. It is also advisable to check if any visitors are staying longer for personal reasons. A very good solution which could contribute positively to building team spirit is to place the group together in the same hotel. This will *maximize on informal networking possibilities and assist group dynamics*.⁵

As the EQUAL Transnationalguide emphasizes *ensure that all the visitors are informed in advance about all logistical arrangements and that there is a clear understanding about who pays which costs*.⁶

4. Meeting place

Make sure that the meeting place is located in an environment that allows work without being disturbed. Access to basic office facilities such as telephone, computer, fax, internet should be provided. Adequate space and a comfortable temperature in the meeting must be ensured. Moreover, the meeting place should be easily accessible from the hotel.

5. Language

It is obvious that partners' language skills can vary. It is important to avoid a situation where native speakers or persons with a very good command of a meeting's language will dominate the discussion whereas persons with lower skills will feel inhibited and reluctant to speak. Participants should avoid using complex language. Any ambiguities must be immediately clarified and common understanding should be frequently checked. If necessary dictionaries should be provided. Also there must be

⁴ A Survival Kit for European Project Management. Advice for Coordinators of Centralised Socrates Projects, 2001, p 39

⁵ A Survival Kit for European Project Management. Advice for Coordinators of Centralised Socrates Projects, 2001, p 41

⁶ EQUAL Guide on Transnational Co-operation 2004 - 2008, 2004, annex- p. 16

awareness that the same notions could have different meaning in different countries. The meeting's language must be chosen well before the meeting date by all members consent.

B. MANAGING A MEETING

1. Agenda

Besides planning the "meeting's environment" it is also crucial to plan carefully the meeting itself. It must be obvious for all team members what the meeting is for, what they will be talking about and what results are expected to be achieved. The only way to assure this is a well structured agenda.

The agenda should be created and accepted by all members of the group. The preparation of the agenda should be a shared process so that all members of a group have joint ownership of the meeting. According to the Survival Kit for European Project Management *the worst mistake the coordinator can make is to create the impression that the project is owned by the coordinating institution.*⁷ All members should feel that they have contributed and that their views are represented.

The agreed-upon agenda should be distributed among participants at least two weeks in advance before the meeting so as to leave them time to prepare for the meeting according to the agenda points (the same concerns all written materials which will be the subject of discussion during the meeting like IDI-scenarios, expert opinions etc.)

The agenda itself should not be overcrowded. It is important to set the priority for quality rather than quantity. The agenda must allow the right time for discussion and ensure each interested person the possibility to express his/her opinion. An exemplary plan of the agenda should include time for:

- a. Each participant's introduction (everyone must know the names and the status of everyone else taking part)⁸
- b. Short description what has already been done
- c. Pointing out what the meeting is for and what are the targets of the meeting
- d. Presentation of key issues
- e. Time for discussion after each issue
- f. Summary and agreement of what happens next

The agenda should be reviewed at the end of each meeting's day to check if all issues were mentioned and if anything requires further discussion.

2. Chairperson

The meeting must have its leader whose role is crucial in creating *the harmonious and productive working environment*⁹.

The chairperson must be nominated before the meeting and should be accepted by all partners.

⁷ A Survival Kit for European Project Management. Advice for Coordinators of Centralised Socrates Projects, 2001, p. 28

⁸ EQUAL Guide on Transnational Co-operation 2004 - 2008, 2004, p. 30

⁹ A Survival Kit for European Project Management. Advice for Coordinators of Centralised Socrates Projects, 2001, p. 39

He/she will be responsible for: checking if all the agenda points are fulfilled, ensuring that the members attention is focused on the agenda points, keeping the schedule by steering the discussion, imposing some kind of discipline on partners and controlling the meeting's time.

The chairperson must have appropriate interpersonal competences *and be sensitive to different cultural approaches and working practices*¹⁰ as on him falls the burden of creating a productive working environment, encouraging people to talk, stimulating the discussion, solving problems and misunderstandings, supporting less experienced team members and assuring that everyone feels valued.

3. Breaks/Social activities

- Breaks

Conducting a meeting ceaselessly for many hours is counterproductive. Peoples' motivation to work and ingenuity tends to decline after about 45- minute concentration on a particular issue. That is why breaking up discussion is desirable. It is recommendable to make short, about ten-minute breaks after each developed agenda point. During breaks persons should have the ability to stand up and straighten their limbs, use a toilet, drink or eat something, breath the fresh air. These, at first sight, small things are in fact of great importance for the quality of a discussion and thus the success of the whole meeting.

- Social events

Usually international meetings last for two or three days which is recognized as an optimal time. Apart from project discussions there is often plenty of time which can be devoted to informal activities during which partners could get to know each other better. These social events, which should be planned in advance include e.g. meals, city walks, nights out, visits to museums, galleries, organized team exercises.

The value of informal networking should not be underestimated and social events can provide relaxation, create a more friendly atmosphere, tighten the bonds between the team members, encourage the less experienced or more shy partners to make a contribution in a more informal situation. It is proven that it is very effective to build a team through social events - it is obvious that putting a group together in a room would not make them work together as a team.

Social events are also a great opportunity to know the partner's country's culture which can be very helpful if some misunderstandings or misinterpretations arise. Moreover, problems which arise during the formal discussion are often solved in a situation with a more informal atmosphere, where awkward issues can be easily discussed. A more relaxing environment helps to present arguments and reach a consensus and often the biggest decisions are taken during discussion when having a meal at the end of the day.

But it is important to find a balance between formal and informal time so as to avoid situations in which a project meeting turns into one social event.

4. Style of work

¹⁰ Ibid. p. 39

The overall success of the meeting depends also on a way in which it is conducted. Intense, uninterrupted discussion in plenary style becomes tiring making the participants bored, less productive and interested after a short time. It is advisable to vary the meeting by making presentations, using technical equipment, showing visualizations etc. It draws attention and helps to stimulate the members concentration. Moreover, making some issues or ideas more visible, rather just than talking about them facilitates the ability to recall what is said and creates opportunities to refer to what has been shown later in a discussion.

It is also important to include into the meeting's agenda not only time for discussion but also time for group or pair work. It enables people to know each other better, maintains concentration and helps to create new fresh ideas and solutions.

C. FOLLOW-UP OF A MEETING

Each meeting should be summarized and the agenda must be checked to see if all the issues were mentioned. It is also advisable to nominate a person who would take notes during the meeting, and if appropriate who would record essential points on a flipchart, which could form the basis for a written summary. This summary should highlight what was done during the meeting, what were the main decisions, what has been agreed and what has to be done next. This meeting report should be distributed among the meeting's participants with one or the latest two weeks of the meeting, so as they still have the meeting in memory and can send their remarks to the report. The report should be accepted by all members because it finalizes some stage of a project and everybody should have the same vision of what has been done and what are the future tasks.

Summary

All above mentioned issues indicate that preparation of the first meeting is not a simple matter and in fact is complex and time-consuming. It is necessary to be aware that even very small things at the first sight unimportant, may weigh on the overall success of the meeting and as a consequence the success of the whole project. The first meeting has the biggest impact on the future work and that it is worth putting as much effort as possible into preparing it so as to minimize any unforeseen problems. If the meeting will be successful, a good working atmosphere will be created, targets will be clarified, problems solved and work shared, there are great chances that the entire project will end on time achieving expected results.

Bibliography:

1. EQUAL Guide on Transnational Co-operation, Brussels, 2004
2. A Guide to practical approaches. Transnational Co-operation in LEADER +, LRDP Ltd London, 2003
3. A Survival Kit for European Project Management Advice for Coordinators of Centralised Socrates Projects 2nd edition: For projects of selection round 1-3-2001 and later, 2001

1.1.3 Checking out question for evaluating partners' potential - good practice at partners' selection stage

The goal of the checking questions is to assess the potential partner's capacity to join the project. The questions were put into two groups: assessing administrative and organizational as well as merit capacity of the institutions:

Administrative and organizational capacity of the partner:

Legal form of the institution and location – in order to find out the financing model or financial requirement as well as to find out if the institution is eligible for funding

1. What is a legal status of the institutions?
2. Is it private or public institution
3. Is it small and medium company?
4. Where is the company located?

Size of the institution – in order to know the institutional capacity of the institution

5. What is the size of the institution in terms of employment?
6. What was the financial revenues of the institution last year?
7. Does the institution has subsidiaries or branches in other ?

Financial standing of the institution

8. Does the institution recorded in the national debt register?
9. Does the institution have the financial problems?
10. What were the financial results of the institution during last years?

Technical and organizational experience in realization of transnational projects

11. Has the institution already participated in the international projects?
12. How many projects has the institution participated/completed?
13. Did the institution accomplish the international projects successfully?
14. What was the average budget of the projects?
15. Did the institution act as a technical coordinator in the project?
16. Was the institution responsible for budgeting of the international projects?
17. Who is going to be in charge of the project (from the administrative and organizational point of view)?
18. Who was a coordinator/partner of the institution in the international projects? – *in that case we are looking for the names of the institutions in order to check or confirm the references of the former partners of the institutions in the projects*

Merit quality of the partner:

Key competences of the institution

1. What are the main fields of the institution's activity?
2. What are the main merit competences of the institution?
3. What is the merit potential of the institution?
4. Who is the main client of the institution?
5. Who is going to be a member of the project team (participate in the project)?
6. How many national and international project have the institution finalized during last years?

Merit experience in a realization of international projects

7. How many international projects have the institution participated in (what type of the projects) during last three years? Who was a coordinator of these projects?



8. How many international projects have the institution coordinated (what type of the projects)? Who was a partner in these projects?
9. Are there any tangible results from the project's realization (reports, papers, books, websites, etc.)? If so could we get some of the papers?
10. Does the institution have any references of the accomplished projects? – *in order to check or confirm the quality of the potential partner's project involvement*

The quality of the research team eventually dedicated to the project

11. Who is going to be in charge of the project at the institution's level (from the merit point of view)?
12. What is the experience of the key research team members – CVs with emphasize on project experience?

Potential source of information about the partner:

1. The web site of the institution
2. Googling – checking the experience of the partner
3. Informal channels of information

1.1.4 E-mail – most popular way of communication in the projects

E-mail is the form of the electronic communication and is called the electronic letter. Important is so that the e-mail would to be written the professional and "mature" language.

E-mail can be approached in different ways depending on your purpose:

1. Decide if it's to be formal style, semi-formal business style or a more informal personal style. In general e-mails trend to be less formal than a letter and are often used for brief communication.
2. Use the tools of e-mail formats and well-constructed information to your advantage.

The formal style is similar to a official (or business) letter.

The semi-formal style is similar to a official (or business) letter but less formal and shorter. A likely ending Best wishes rather Yours sincerely. This style is best used for e-mails to people who you do not know well (or outside your company). The emphasis is on the efficient provision or exchange of information.

The informal style is suitable for e-mails to people whom you know well (or within your company). The greeting is often *Hi*, *Hello* or even *How are you?* The style is much closer to spoken than normal written language.

The rules of effective writing of e-mail:

- Clearly state the purpose of communication in the subject line (e.g. new project + title + action needed + deadline).
- Write e-mail with purpose and make that purpose known in the first paragraph.
- Clearly write down the action or decision to be taken and by who and give a clear deadline.
- Never use a metaphor, simile or other figure of speech which you are used to seeing in print.
- Never use a long word when a short one will do.
- If it is possible to cut a word out, always cut it out.
- Never use the passive where you can use the active.
- Be sure to include a meaningful subject line; this helps clarify what your message is about and may also help the recipient prioritize reading your e-mail.

- Use standard spelling, punctuation, and capitalization.
- Write clear, short paragraphs and be direct and to the point; professionals and academics alike see their e-mail accounts as business. Do not write unnecessarily long e-mails or otherwise waste the recipient's time.
- Use the ! (importance: high) only when you immediately wish an answer the same day.
- Be friendly and cordial, but do not try to joke around.
- Avoid unnecessarily large file sizes in attachments.
- Make sure you clearly address the right person in the management (cc the others only when necessary).

The elements of the e-mail:

1. Subject
 - The highest 5-6 words
 - Application of the cause of writing e-mail in the measure in detail
2. Salutation, End and signature
 - If it is formal style and when we know the addressee: Salutation – Dear Mr. / Mrs. [name of addressee]; End – Yours sincerely
 - If it is formal style and when we do not know the addressee: Salutation – Dear Sir / Madam / Sir or Madam; End – Yours faithfully
 - If it is semi-formal style: Salutation – Dear [name of addressee], End – Best Wishes
 - If it is informal style: Salutation – Hi, Hello [name of addressee]; End – Regards
 - Signature should have not more than 5 lines
 - In signature we can put: our name, e-mail address, telephone number, web site address etc.
3. Proper content
 - Introduction: the application of the reason / the aim of e-mail
 - Discussion: exact description of the matter which is the reason / the aim of the e-mail, the application of all details
 - Closing: the expression of the readiness of answer on possible questions, information about the desire of the obtainment of the answer [e.g. I look forward to hearing from you soon]

1.1.5 Memo – way of communication facilitating carrying out the projects

A memo is a short, to the point communication conveying your thoughts, reactions or opinion on something. Memos are usually for internal communication. A memo can call people to action or broadcast a bit of timely news, e.g. from companies meetings. With memo writing, shorter is better.

Memos can be approached in different ways depending on your purpose:

1. Decide if it is to be persuasive or informative. A persuasive memo engages the reader's interest before issuing a directive, where as an informative memo outlines the facts and then requests the reader's actions.
2. The tone may be formal or neutral (not informal).
3. Memo should have not more than one page of information. If it is a complex topic extending into multiple pages, still keep the language as direct as possible, add headings or bullets to guide the reader and conclude with a summary paragraph of key points.
4. Effective business communication improves workflow and relationships. You may use the tools of memo formats and well-constructed information to your advantage.

The segments of meeting memo should be allocated in the following manner:

1. Header:
 - To who memo is addressed (To), who should reach message (CC), who prepared memo (From), the date of preparing memo (Date) and the title / subject of meeting to which memo relates (Subject)
 - header should make up 1/8 of memo
2. Opening, Context:
 - when meeting was, who participated in meeting, subject and touched matters (briefly)
 - this segment should make up 1/4 of memo
3. Discussion Segment, Summary:
 - widened description of touched matters, presented opinions, short relation from the discussion, meeting summary
 - discussion segment and summary should make up 1/2 of memo
4. Closing Segment, Necessary Attachments:
 - meeting recapitulation, settlements and recommendations resulting from meeting (e.g. information about the next meeting, who, when and what should do)

- refer to attachments in memo and add a notation about what is attached below
- this segment should make up 1/8 of memo

It is put the template of meeting memo below:

Memo

To: (readers' names and job titles)
CC: (any people you are copying the memo to)
From: (your name and job title)
Date: (complete and current date)
Subject: (what the memo is about, meeting subject)

Opening, context
 (e.g.: On April 20, 2009, the staff met with representatives of EC to discuss Release No. 44-55521, "Forecasts for Central and Eastern Europe." Those present on behalf of EC included J. Douglas, Macroeconomic Department Director... Those present generally discussed preliminary questions and comments of current GDP forecasts)

Discussion Segment, Summary.....

Closing Segment, Necessary Attachments.....

The rules of effective writing of memos:

- Clearly state the purpose of communication in the subject line.
- Write memos with purpose and make that purpose known in the first paragraph.
- Keep language professional, simple and polite.
- Use short sentences.
- Use bullets if a lot of information is conveyed.
- Points should be arranged in logical order.
- Proofread before sending.

- Address the memo to the person(s) who will take action on the subject, and CC those who need to know about the action.
- Attach additional information: don't place it in the body of the memo if possible.
- Memo writing, shorter is better.

1.1.6 Project human resources management

Project human resource management is multi-faceted. It is the ability to lead, direct, and orchestrate the project team, the customers, project partners, contributors, and any other stakeholders to achieve the desired results for the project purpose. Project managers cannot, and must not, do everything. They must rely on the project team to complete the project work.

Have you ever worked on a project where the project manager wanted to do the work? Or the project manager assigned the mundane tasks to the project team and did the most important activities himself? Or the project manager completed the activities with the highest exposure? Not good. Project managers must delegate activities.

Project human resource management relies on the general management skills:

- Leading
- Communicating
- Negotiating
- Problem solving
- Influencing

Project managers must find ways to motivate the project team to complete the work. There is a tendency, in many projects, for the project team to be very excited about the project at the start and then the excitement wanes as the project moves toward completion. The project manager must coach and mentor to develop the project team to ensure the excitement, willingness, and dedication to the project work continues.

Throughout the project the project manager will have to address project team retention, labor relations, performance appraisals, and, depending on the nature of the project work, health and safety issues. As most projects are new and temporary, so too are the relationships between the project team members and the project manager.

As the project progresses, the number of stakeholders in the project may change. The project manager and the project team will need to be aware of the coming flux of stakeholders and how this change may affect the dynamics of the project team and the project work. An approach to project human resources may work well in one phase of the project but not in another due to the stakeholders that have become involved.

Project human resource management may not be completely in the hands of the project manager. The performing organization's HR department may have control over the majority of the assignment and recruitment of the project team, but the project manager will need some knowledge as to the responsibility, power, and autonomy in order to comply with the organization's policies.

Identifying the Staffing Requirements

Every project needs people to complete the work. Staffing requirements are the identified roles needed on a project to complete the assigned work. For example, a project to install a new telephone system throughout a campus would require a menagerie of workers with varying skill sets: hardware and software gurus, telephony experts, electricians, installers, and others. The identified staff would be pulled from the resource pool. Any skills gaps would need to be addressed through staff acquisition, additional training, or procurement.

Creating the Role and Responsibility Assignments

There are slick definitions for roles and responsibility:

- **Role** Who does what
- **Responsibility** Who decides what

The assignment of the roles and responsibilities determines what actions the project manager, project team member, or individual contributor will have in the project. Roles and responsibilities generally support the project scope since this is the required work for the project.

An excellent tool that the project manager should create is the Responsibility Assignment Matrix (RAM). A RAM can be high-level—for example, mapping project groups to the high-level components of a WBS, such as architecture, network, or software creation. A RAM can also be detailed specific to the activities within the project work.

Creating a Staffing Management Plan

The staffing management plan details how project team members will be brought onto the project and excused from the project. This subsidiary plan documents the process the project manager is expected to complete to bring new project team members aboard based on the conditions of the project.

For example, a project may require an application developer in the third phase of the project. The project manager may have to complete a job description of what the application developer will be responsible for, how their time will be used, and how long the role is needed on the project. HR or other functional managers may have to approve the request.

A Responsibility Assignment Matrix can map work to project team members.

| WBS Component | Resource 1 | Resource 2 | Resource 3 | Resource 4 | Resource 5 | Resource 6 |
|---------------|------------|------------|------------|------------|------------|------------|
| | | | | | | |

| | | | | | | |
|---------------|----|---|---|---|---|---|
| Architectural | RS | | R | | A | |
| Foundation | A | R | I | | | |
| Framing | S | | A | | I | |
| Electrical | S | | | R | | A |
| Interior | S | A | | | I | R |

A = Accountable

R = Responsible

I = Informed

S = Sign off

Resource histograms illustrate demand for labor

Management may also want to see a resource histogram, so they may plan employees' time and activities accordingly. Management may elect to hold off on the launch of a project based on the requirement for resources and the conflict with business cycles or other projects with higher priorities within the organization.

Each performing organization will likely have policies and procedures that should be documented, and followed, to bring resources onto the project team. In addition, the organization may have similar ways to excuse project team members from a project once their contribution has been completed.

The staffing management plan should

- Detail how project team members are brought onto and released from the project
- Account for employees' time on the project
- Use employees as needed, and when needed
- Remove or reduce worries about employment by communicating the expected need for resources

Creating an Organizational Chart

An organizational chart can help the project manager and the project teams identify the reporting relationships among the project team, management, and other key stakeholders. The following figure is an example of an organizational chart, or org chart. The org chart can help the project manager identify what communication protocols are used in a large project. Org charts can also identify the relationship of team members and contributors in a smaller project.

An organizational breakdown structure (OBS) is also an organizational chart. This tool, however, identifies the organizational units or departments and what work packages they are responsible for within the project.

Managing Staff Acquisitions

Have you ever managed a project where the resources you want on the project are not available? Or have you managed a project where the resources you've been assigned aren't the best resources to complete the project work? Staff acquisition is the process of getting the needed resources on the project team to complete the project work. Staff acquisition focuses on working within the policies and procedures of the performing organization to obtain the needed resources to complete the project work. Negotiation, communication, and political savvy are key to getting the desired resources on the project team.

Referring to the Staffing Management Plan

The project manager will rely on the staffing management plan as an input to acquiring project team members. The staffing management plan details how project team members will be brought onto the project and excused from the project as conditions within the project demand. The staffing management plan is a subsidiary plan that documents the staffing requirements of the project.

Examining the Staffing Pool

In some organizations the project manager has little or no say on the project team assignments. No fun. In other organizations, project managers have the ability to recruit, or at least influence, the project team assignments. The project manager should ask questions about:

- **Experience** What is the experience of the project team member? Have they done similar work in the past—and have they done it well?
- **Interest level** Are the project team members interested in working on this project?
- **Characteristics** How will this individual team member work with other project team members?
- **Availability** Will the project team members desired for the project be available? Project managers should confer with functional managers on the availability of the potential team member.
- **Knowledge** What is the competency and proficiency of the available project team members?

Recruiting Project Team Members

The project manager has to follow the rules of the organizations involved in the project. For example, an organization may forbid a project manager from approaching a worker directly to discuss their

availability and desire to work on a project. The project manager may instead have to speak with the employee's functional manager to obtain the resource.

Acquiring the Needed Staff

A project needs a project team. Let me restate that. A project needs a *good, qualified, competent* project team. Their competency, experience, and availability will directly influence the success of the project. Armed with this notion, the project manager may rely on a few different tools and techniques to obtain the needed project team resources.

Negotiating for Resources

Most projects require the project manager to negotiate for resources. The project manager will likely have to negotiate with functional managers to obtain the needed resources to complete the project work. The functional managers and the project manager may struggle over an employee's time due to demands in ongoing operations, other projects, and effective utilization of resources. In other instances, functional managers may want to assign under-utilized resources on projects to account for their employee's time.

Project managers may also have to negotiate with other project managers to share needed resources among projects. Scheduling the needed resources between the project teams will need to be coordinated so both projects may complete successfully. An organization's politics certainly come into play with staff acquisitions. Functional managers may want project managers to carry extra resources on the project in exchange for key personnel, added deliverables to the project, or other "favors" for the manager.

Working with Preassigned Staff

Project team members are often preassigned to a project for a number of reasons:

- Availability of the individual
- Promised as part of a competitive contract
- Required as part of the project charter of an internal project
- Opportunity for the staff member to complete on-the-job training

Whatever the reasoning behind the assignment of the staff to the project, the project manager should evaluate the project team for skills gaps, availability to complete the project work, and expectations of the project team members. The project manager must address any discrepancies between the requirements of the project work and the project team's ability to complete the work.

Procuring Staff

In some instances, the project manager may have no alternative but to procure the project team or individuals to complete the project work.. In regard to project team procurement, reasons why the project manager can use this alternative include, but are not limited to, the following:

- The performing organization lacks the internal resources with the needed skills to complete

the project work.

- The work is more cost effective to procure.
- The project team members are present within the organization, but they are not available to the current project.
- The project team members are present within the organization, but they cannot complete the needed work due to other project assignments

Assembling the Project Team

Congratulations! The project team has been recruited or assigned to the project. With the project team assembled, the project manager can continue planning, assigning activities, and managing the project progression. Project team members can be assigned to the project on a full- or part-time basis depending on the project conditions. Once the project team is built, a project team directory should be assembled. The project team directory should include

- The project team members' names
- Phone numbers
- E-mail addresses
- Mailing addresses if non-collocated
- Contact information for key stakeholders
- Any other relevant contact information for each team member, such as photos, web addresses, and so on.

Developing the Project Team

Throughout the project, the project manager will have to work to develop the project team. The project manager may have to develop the ability of the individual team members so that they can complete their assignments. The project manager will also have to work to develop the project team as a whole so the team can work together to complete the project.

In matrix organizations, the project team members are accountable to the project manager and their functional managers. The development of the project team can prove challenging since the project team members may feel pulled between multiple bosses. The project manager must strive to involve and develop the project team members as individuals completing project work—and as team members completing the project objectives together.

Preparing to Develop the Project Team

The project manager will rely on several pieces of information to prepare for team development:

- **Staff assignments** The assignments of the project team members define the skills of the project team members, their need for development, and their ability to complete the project work as individuals, and as part of the collective team.
- **Project plan** The project plan defines the expectations of the project team, how the team will operate, and how the team will be expected to communicate, function, and perform.
- **Staffing management plan** Recall that the staffing management plan details how project team members will be brought onto the project and excused from the project.
- **Performance reports** As the project team completes work, performance reports will reflect on the quality, timeliness, and success of the project team.
- **External Feedback** When things are not well with project team members, stakeholders are often happy to tell the project manager. In some instances, the project manager must query stakeholders and organizational interfaces on the performance of the project team members.

Leading Project Team Development

Due to the temporary and short-term nature of projects it can be tough for a group of strangers to come together, form relationships, and immediately create a successful project. Team development is the guidance, direction, and leadership the project manager offers to influence a project team.

The project managers are the power on the project team. While there may be some resistance of the project team to cooperate with the project manager, complete assigned duties, or participate as requested, the project team should realize the project manager is the project authority. There are five types of powers the project manager yields

- **Expert** The authority of the project manager comes from experience with the technology the project focuses on.
- **Reward** The project manager has the authority to reward the project team.
- **Formal** The project manager has been assigned by senior management and is in charge of the project. Also known as positional power.
- **Coercive** The project manager has the authority to discipline the project team members. This is also known as “penalty power.” When the team is afraid of the project manager, it’s coercive.
- **Referent** The project team personally knows the project manager. Referent can also mean the project manager refers to the person who assigned him the position—for example, “The CEO assigned me to this position so we’ll do it this way.” This power can also mean the project team wants to work on the project or with the project manager due to the high priority and impact of the project.

Creating Team-Building Activities

Team-building activities are approaches to develop the team through facilitated events. Events can

include

- Team involvement during planning processes
- Defining rules for handling team disagreements
- Off-site activities
- Quick team-involvement activities
- Activities to improve interpersonal skills and form relationships

Dealing with Team Disagreements

In most projects, there will be instances when the project team, management, and other stakeholders disagree on the progress, decisions, and proposed solutions within the project. It's essential for the project manager to keep calm, lead, and direct the parties to a sensible solution that's best for the project. Here are seven reasons for conflict: schedules, priorities, resources, technical beliefs, administrative policies and procedures, project costs and finally personalities.

So what's a project manager to do with all the potential for strife in a project? There are five different approaches to conflict resolution:

- **Problem solving** This approach confronts the problem head-on and is the preferred method of conflict resolution. You may see this approach as "confronting" rather than problem solving. Problem solving calls for additional research to find the best solution for the problem, and should be a win-win solution. It should be used if there is time to work through and resolve the issue. It also serves to build relationships and trust.
- **Forcing** The person with the power makes the decision. The decision made may not be the best decision for the project, but it's fast. As expected, this autocratic approach does little for team development and is a win-lose solution. Used when the stakes are high and time is of the essence, or if relationships are not important.
- **Compromising** This approach requires that both parties give up something. The decision made is a blend of both sides of the argument. Because neither party really wins, it is considered a lose-lose solution. The project manager can use this approach when the relationships are equal and no one can truly "win." This approach can also be used to avoid a fight.
- **Smoothing** "smooths" out the conflict by minimizing the perceived size of the problem. It is a temporary solution but can calm team relations and boisterous discussions. Smoothing may be acceptable when time is of the essence or any of the proposed solutions will not currently settle the problem. This can be considered a lose-lose situation since no one really wins in the long-term. The project manager can use smoothing to emphasize areas of agreement between disagreeing stakeholders and thus minimize areas of conflict. It's used to maintain relationships, and when the issue is not critical.
- **Withdrawal** This is the worst conflict resolution approach since one side of the argument walks away from the problem, usually in disgust. The conflict is not resolved and it is

considered a yield-lose solution. The approach can be used, however, as a cooling off period, or when the issue is not critical.

Relying on General Management Skills

A chunk of project management relies on general management skills. Specifically, the project manager relies on:

- **Leading** is the art of establishing direction, aligning people, and motivating the project team to complete the project work.
- **Communicating** Good project managers are good communicators. Remember, half of communicating is listening.
- **Negotiating** Project managers will likely negotiate for scope, cost, terms, assignment, and resources.
- **Problem solving** Project managers must have the ability to confront and solve problems.
- **Influence** Project managers use their influence to get things done.

Rewarding the Project Team

A reward and recognition system encourages, emphasizes, and promotes good performance and behavior by the project team. The reward and recognition system should be a formal, achievable approach for the project team to perform and be rewarded for their outstanding performance.

The relationship between the requirements for the reward and the power to achieve should not be limited. In other words, if the project manager is rewarded for completing a project by a given date, she needs the autonomy to schedule resources and make decisions so the goal is achievable.

The project team should be rewarded for good work and not for bad. For example, a project team should not be rewarded for completing a crucial assignment on schedule if the work is unacceptable because of quality issues. Finally, the culture where the project is taking place should also be considered. It may be inappropriate to reward individual team members over an entire group, or vice versa. The project manager should be aware of the cultural differences and operate within the customs and practices of the environment to reward the project team without causing offense.

Examining the Results of Team Development

Team development is an ongoing process. Optimum team performance doesn't happen on the first day of the project, but hopefully it does so well before the final day of the project. The primary goal of team development is to improve project team performance. Improvements can include

- **Individuals** Improvements to individual skill sets may allow the individual to complete their



assigned work better, faster, or with more confidence.

- **Team** Improvements to the project team may allow the team to perform with a focus on technical requirements, project work, and working together (in harmony) to complete the project work.
- **Individuals and team** Improvements to either team members or the project team as a whole may lead to the better good of the project by finding better ways of completing the project work. Another result of team development is the input to performance reviews of the project team members. Hopefully, all goes well and the project manager can report successful, willing, and cooperative team members. Honesty is paramount in reporting the performance of project team members.



1.1.7 Intercultural Competences¹¹

Operating on a field of international business (whether it is a cooperation within one multinational corporation or several small/medium companies working together on a project) could be a challenging task for a manager. Especially when partners have different approaches to solving problems. When put in different words, the greater the mosaic of cultures the greater the challenge for all parts of the mechanism to work smoothly. However, if that pressure is being reduced and all components are working on their place, what could be achieved is a unique colourful environment of creativeness and task orientation. In the case of multinational projects, the Manager's task is not only to optimize the process but also to reduce the intercultural pressure within the group. To achieve that, the first step is to be aware of the challenges. This section will focus on the cultural context of the projects, and more specifically European Projects.

The Cultural Awareness

The Cultural Awareness, and generally the ability to work within multicultural teams is based on the perception, the individual builds upon cultural experiences and knowledge. And here, during the process of learning the same individual usually processes the information by comparing new facts with those that are already existing in his or her cognitive memory. In this manner, *"Perception is the basic process underlying the experience and sorting out and valuing of all that happens and how it is interpreted. Therefore it is of utmost importance to train one's own perception because this is an important stepping stone towards intercultural competence"* (Intertool 2009). As the process itself is cognitive the information is being filtered by past experience. Thus, perception could be described as an active process of observation and filtration of the surrounding environment. In other words when two individuals look at the same object, the results of the observation could be slightly different, because of their past experience connected to the observed phenomena. Ergo, the emotions involved could be dissimilar for each of the spectators. Taking that into account, perception is also a selective process of the already known impressions, in the particular situation.

Awareness of that fact becomes significant especially in the spectrum of communication. That is, because a person from another cultural background could have other values, norms or ways of expressing opinions. In that case, Project Managers have to be prepared for the situation where project members react in an 'unsuspected' way. Further, there might be situations where partners feel at loss, frustrated, amused or even angry. A good practice might be to remember that what we tend to see as appropriate behaviour could rise a negative feeling amongst others. It is because, *"we are not all neutral or objective in our judgment about the behaviour of others."* (Intertool 2009, p. 2)

Stereotyping

Another issue that the Project Manager has to be aware of is Stereotyping. Its concept could be described as *"a generalized and sustainable perception of groups and nationalities, countries and*

¹¹ Based on the materials provided by INTERTOOL project, 2009

their individual members." (Intertool 2009) The perception is usually not based on direct experience, nor the real life impressions, but rather based on the sayings or jokes about others. Stereotypes could have strong connotations and they could concern selective groups eg. blonds, women, men or students.

Bringing up closer what stereotypes really are, the concept could be pictured as follows:

"A group of people meet at the National Geographic Society in London and decide that, for the next meeting, everybody had to present a treatise on the elephant. They all return the following year and present their volumes. The German has a 700-page dissertation: Beschreibung des männlichen Elephantes in Ost-Africa. 1. Teil. (description of the male elephant of East Africa, Part I). The Englishman has a small, sober, black leather-bound book entitled "Elephants I have shot". The American has an 8-page booklet in colour, "How to make bigger and better elephants", while the Frenchman has a small tastefully presented book on L'amour des elephants ('The love life of elephants'). The Pole presents a book called 'The elephant and its relation to the Polish Problem', while Sweede has a grayish book called Elefanter och hur man titulearar dem ('Elephants and how to address them'). The Dane presents a book of recipes: Elefant på 100 måder ('100 ways to cook an elephant'), while the Norwegian has a book entitled Norge og vi nordmænd ('Norway and we Norwegians')." Source: dialogin Intercultural academy, Author: Richard Hill (Intertool 2009)

Stereotypes in Multicultural Teams

Stereotypes in Multicultural Teams could have a significant impact on the group and consequently on the project itself. *"When a European project team gathers for the first time for the <<kick -off>> meeting, the stereotyped image of the <other> is bounced to be a companion. It will work both ways – in the expectations towards <the other> as well as in the <self-perception>. Will the Italian be punctual? I am sure they expected me as a German to be well organized and structured."* (Intertool 2009) Knowing that, it is up to Project Manager to maintain the balance within the group, for the work to proceed smoothly. The relevant question will be: How to do it? Well, one of the helpful techniques is to **control** (to some point) the **emotional environment**. To do it, the first, and probably the most important thing is to observe first and rather not to act. *"There should not be a frustrated overreaction, but patience needs to be exercised."* (Intertool 2009) In the same time, all of the situations are different and need the individual approach. What might be also at assistance is a **precise observation**. *"Taking into regard that we all tend to judge very quickly based on our own cultural filters, experiences and knowledge it is important for us to concentrate on what we can really observe and separate analytically, the pure observation from interpretation and judgment. To do this we can ask ourselves the following questions:*

Observation: What can I really see, what is the behavior action.

Interpretation: How do I explain the behavior, which reason do I find for it. Why does this happen.

Judgment (?): How do I judge this behavior, do I find it negative of positive, what do I feel about it?" (Intertool 2009)

Also, what might be in use is so called **Reflection Exercise**. Basically, when I ask myself individually the questions like: What I did, What the other did... than Explanation of my behavior, How the others might see my behavior from their perspective, what is my personal explanation of the behavior of others, and possible explanation of the others behavior by others. Being aware of how we judge



other participants in the group might be an important step in building the tolerance, and bounds in the spectrum of multicultural communication.

Categorizing and stereotyping is an inseparable steps for most of the people, this is how we are trying to understand the world, the surrounding new environment. However it is important how we manage the emotions connected to the process of gaining this awareness.

Team building is often perceived as the most important part of the project, and colloquially speaking, that's right! We are (in most of the cases) working with our partners on the same project for as least several months. That is why the team have to be built in a way to achieve potential synergy within all the participants of the project.

"Tools that have been proposed (Nancy Adler 2002) are amongst others:

Focus on task-related selections when assigning team member roles. Try to avoid selecting roles based on gender or culture; rather, select roles based on a team member's abilities.

Do not minimize differences in culture or background. Rather, encourage understanding and respect the diversity within the team. Strive towards creating mutual respect between team members.

Acknowledge each member's contributions and accomplishments. Ensure the team remains aware of the project's deliverable.

Establish a vision for the project that transcends team member differences. Work towards equalizing each team member's influence within the group process by minimizing dominance by any one member or group.

Positive feedback and encouragement should be given; do not dwell on failures and celebrate success.

Finally, defining a culture the group can call its own is often a good way to encourage teamwork.

Establishing team goals and using team-building exercises are two examples of encouraging relationships to develop within the team. This can allow members to grow together and function more cohesively." (Intertool 2009)

In the context of cultural dimensions, introduced by Geert Hofstede in "Cultures and Organizations: Software of mind". The multicultural team could be seen by the several spectrums.

In one of the training materials from Intertool Project the issue had been presented using following points:

1. Focus on group belonging vs. focus on individuality

International project teams need to find a balance between the interests of the group and the interests of the individuals. Team members used to cultural standards with a strong focus on individuality will clearly state their opinion and demand their individual space which they see as a prerequisite for a good performance of the whole group. Team members from cultures with a group focus will tend to hold back individual opinions if they think they are not appropriate for achieving success as a team.

Also questions of loyalty towards one own's organization as opposed to seeking the best solution to achieve the goals of the project can create tensions.

2. Meaning of formal rules vs. meaning of context related strategies

On one hand international projects need reliable rules and commitments. On the other hand projects with many and diverse partners need to be flexible enough to adapt to changing situations and

working conditions. According to cultural standards some team members might value rather firm rules and assignments whereas others tend to see this as blocking and preventing the process. Also there can be different perceptions of what 'a good team member' should be like. This could be reliability and responsibility but also creativity and being more spontaneous. The project manager needs to take a decision how clearly tasks and responsibilities need to be allocated or whether the focus should be more on the continuing coordination of working processes. Also he/she needs to decide how far to cater to the individual needs of project partners and how much flexibility will be allowed with regard to the goals and project activities.

3. Hierarchy and authority vs participation and autonomy

This cultural standard has an effect in situations where decisions have to be taken and there is a controversy between the perspective of the project manager and project partners. Team members used to being involved in decision making processes will not have too many problems with criticising the project coordinators decisions. A specific difficulty lies in the fact that the project manager does not have any formal power. Some project partners might also favour a senior person or someone in a higher hierarchical position. For others the competencies in the field and social skills in leading the project might be more important.

4. Competition and assertiveness vs responsibility and care taking

When representatives of these contradictory cultural standards work together in a project team, tensions can arise around questions of how long discussions should be, who has the final say, how modest should the issues under discussion be treated. For one person being an assertive and charismatic leader is seen as positive, and for another being a good moderator is the preferred leadership style.

6. Monochrone vs. polychrone time orientation

A range of diverse opinions can exist in a multicultural project team concerning the structure and time management of a project. This concerns the adherence to work plans, time agendas and deadlines, but also concerning the organizations of meetings. Whereas some team members perceive strict time management and clear work plans for a prerequisite of successful project management, for others being spontaneous and flexible has priority. The project manager is confronted in a very concrete form with this constant dilemma. He/She has to decide whether priority will be given to the strict adherence to organization and time planning or whether he/she will preferably adapt to the working conditions of the project partners.

7. Implicit vs. explicit communication

Tensions can arise concerning the 'right amount' and 'style' of communication. Some people prefer a very direct communication style where it is important to get to the point in an efficient and effective manner. This is one of the field where a lot of research has been conducted demonstrating and highlighting different cultural standards, especially with regard to voicing negative aspects or conflictual issues.

The project manager will have to moderate between these differing attitudes. He could either identify some communication standards, which could be used as rules by the group, or he/she will have to 'translate' between the different standards to secure a good working atmosphere.



8. Conflict vs. harmony orientation

In all projects there are conflictual issues and decision to be taken. Cultural standards differ around how this can be done. In harmony oriented cultures it is very important that nobody should 'lose his face'. So conflicts will not be treated openly and direct critique is also not supported. Other team members will perceive the direct an open treatment of conflicts as important for an efficient team work and a motor for team development. They judge uncleared conflicts to endanger cooperation in general. They also see feed-back and criticism as a source for learning

9. Task orientation vs, relationship orientation

There are also clear cultural standards concerning a focus on task orientation as opposed to focussing on relationships. This is known from research and experience that for some people it is important first of all to build a good relationship before starting the 'business' talk, whereas for others concentrating on the task has the foremost priority. In their perspective for example project meetings should have the goal of coordination and decision making, so they should be held as short and efficient as possible. (Intertool 2009)

Communication

Communication is often pictured to be one of the most important aspects when it comes to good multinational teams functioning. The issue is often hardly identifiable; however it takes a significant part in the project process. "Communication is a dynamic process influenced by culture. The thoughts, ideas and emotions of one person are sent through signals (words, tones, voice, body and facial expressions) to another person, who reacts to them on different levels. Messages can only be understood in a correct way, if sender and receiver have the possibility to decode them in a common social context. Shared background knowledge is a precognition for well functioning communication." (Intertool 2009) Knowing that, it might be a good practice to use **communication models** to increase the accuracy of the message. In this work I will present the 4 EAR communication model developed by Friedemann Schultz von Thun.

According to the model, the message is exchanged in four levels:

CONTENT – What I am informing about.

SELF DISCLOSURE – What do I reveal about myself, what should I do, feel, think based on the message.

THE RELATIONSHIP – How do I think about you.

AN APPEL – What do I want to achieve / get from you.

Self disclosure:

What kind of person
is he?

Relationship:

How does he talk to
me? Who does he think I am?



Content:

What are the facts?

Appeal:

What does he want me to
think of do, how does he
want me to feel?

Source: Intertool 2009 also available at: Arbeit mit Modellen (http://www.fachdidaktik-einecke.de/7_Unterrichtsmethoden/arbeit_mit_modellen_neu.htm)

Virtual communication

The medium, for instance email, or videoconferencing has often its own cultural (cyber) implications. That could be associated with mental models, expectations or practices. *“Cyberculture is not neutral-free, but reflects the values of its (original) developers and is thus a carrier of the culture that prevails in that particular community.”* (Intertool 2009) Put in the other words, it might have its own formality, flexibility or interaction styles eg. greetings or use of apology, and what is probably the most important: the expectations of the time of response. Moreover, on the online environment, the so called ‘cultural gaps’ could be observed. The differences between junior and senior members of the project, experience, gender and perception of time have a huge impact on the way we communicate virtually. And so, many communication technologies lack elements inherent to face-to-face communication (context perception, dynamism, and parallel visual channel).

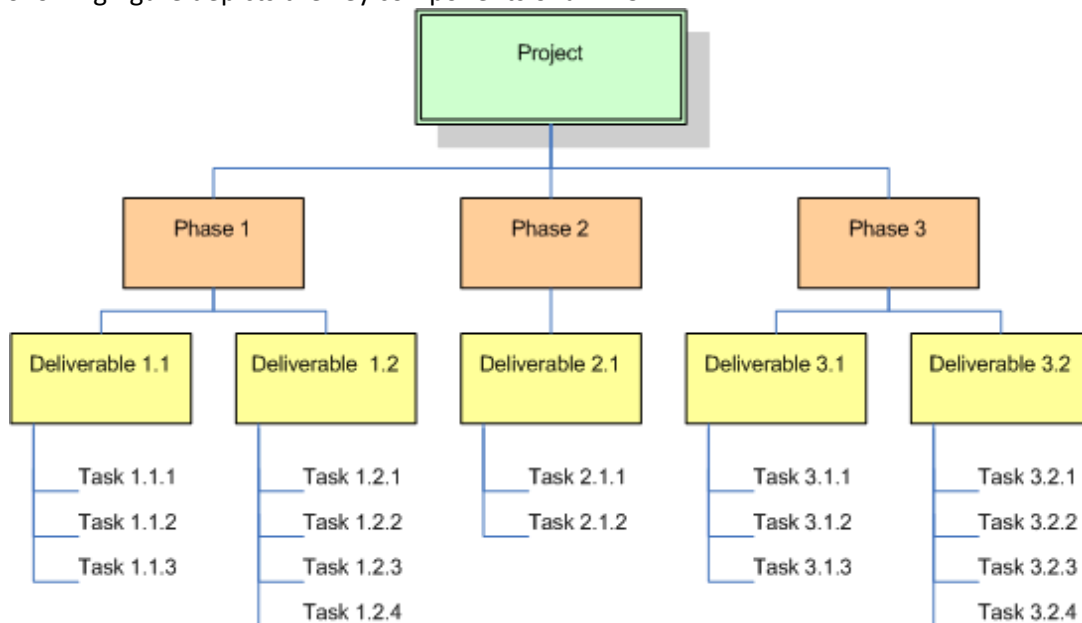
1.1.8 Project scheduling and time planning tools

This section looks at the best method for delineating the key project elements like tasks, deliverables and milestones. They are mainstay of creating a comprehensive work breakdown structure (WBS), and the process needed to convert the WBS into a task network and a Gantt chart showing the logical sequencing of various tasks. It will be also illustrated how to compute the project's estimated duration, by identifying the critical path through the network, using the forward and backward pass method. It concludes with a discussion of the methods for optimizing resources allocation and steps needed to compress the critical path of a project (ways to reduce its expected duration).

1. Work Breakdown Structure

The process and the end product are known as the **Work Breakdown Structure (WBS)**. The WBS is a method for successive partitioning of a project into the smaller components (elements) – phases, deliverables, and tasks – needed to complete the project. The basic idea is to progressively break the project into small enough components (tasks), where each can be assigned to one person and can be completed in a reasonably small amount of time.

The following figure depicts the key components of a WBS.



Creating a WBS



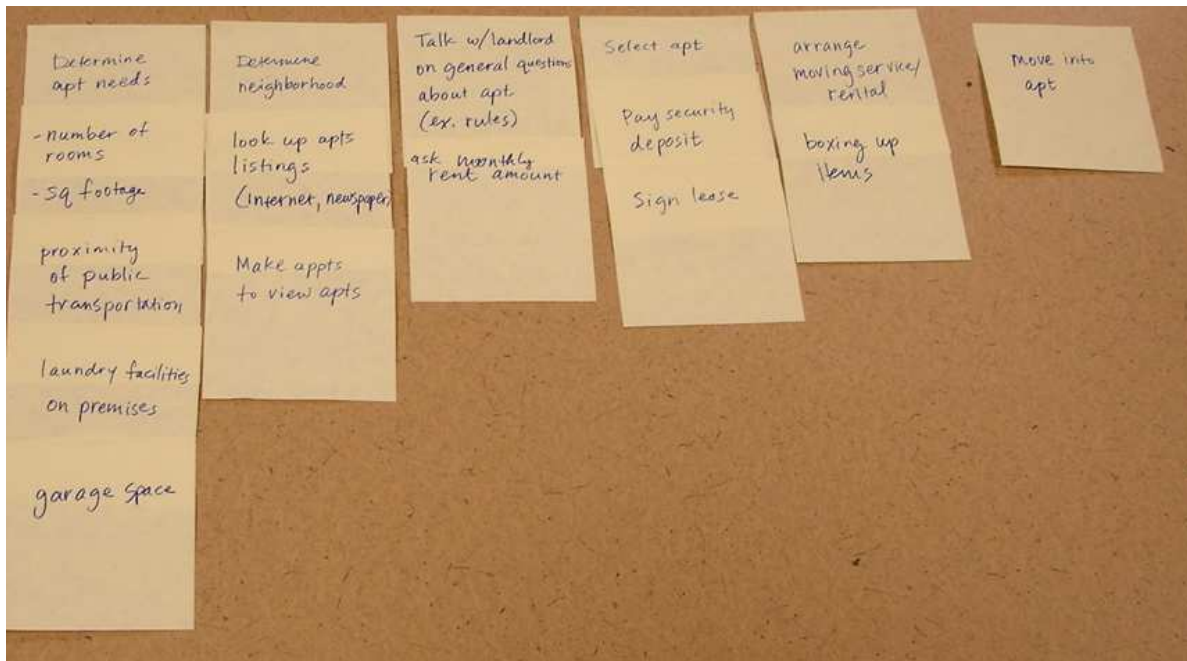
It is highly advisable to use flip charts and sticky notes for creating and depicting the WBS of a project. Only after a comprehensive WBS has been created will it be entered into the project management software (this will be shown later). The use of sticky notes to develop a WBS is more efficient and productive than the use of project management software.

The use of sticky notes has several advantages:

- it allows all members of the team to participate fully in the WBS development,
- it allows the team to move the various project elements around easily,
- it allows for quick disposal of unneeded elements,
- and it facilitates making changes such as renaming phases, deliverables, and tasks.

Also, it allows a large group of people, to hover around the work in progress and view it jointly. With project management software, all of these actions are cumbersome and difficult.

Example of a draft version of WBS being developed with the use of sticky notes:



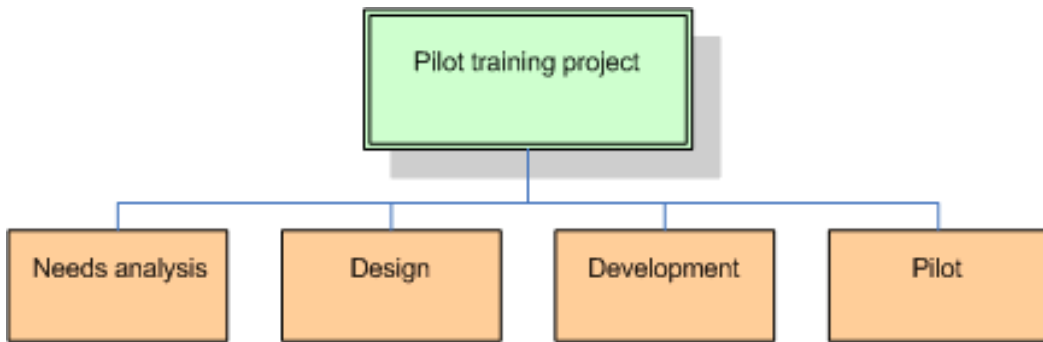
Phase-Level Decomposition

The first step is to define the phases of your project. For this discussion, we will use the example of a pilot training project, for which the product development life cycle consists of the following four phases:

1. Needs analysis



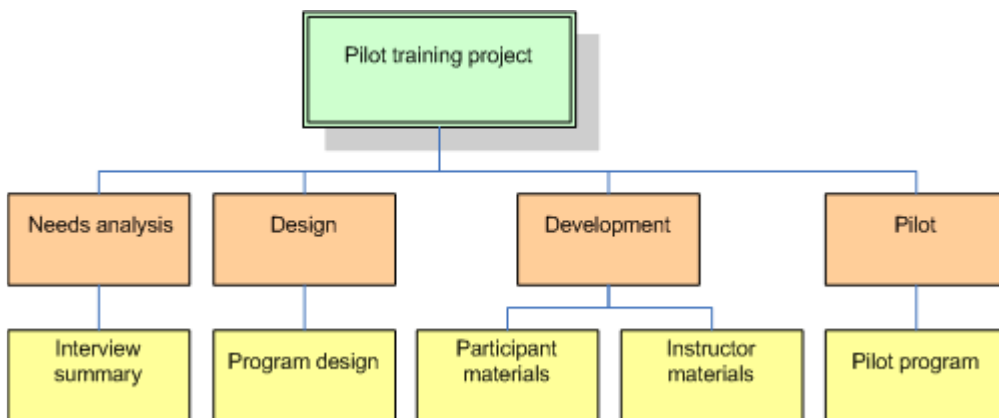
2. Design
3. Development
4. Pilot



As shown in the above figure, this is the first level of the WBS for the project. Once the phase names have been decided, obtain as many sticky notes as there are project phases and write the individual phase name on each of them (try to use different colors for different decomposition levels).

Deliverable-Level Decomposition

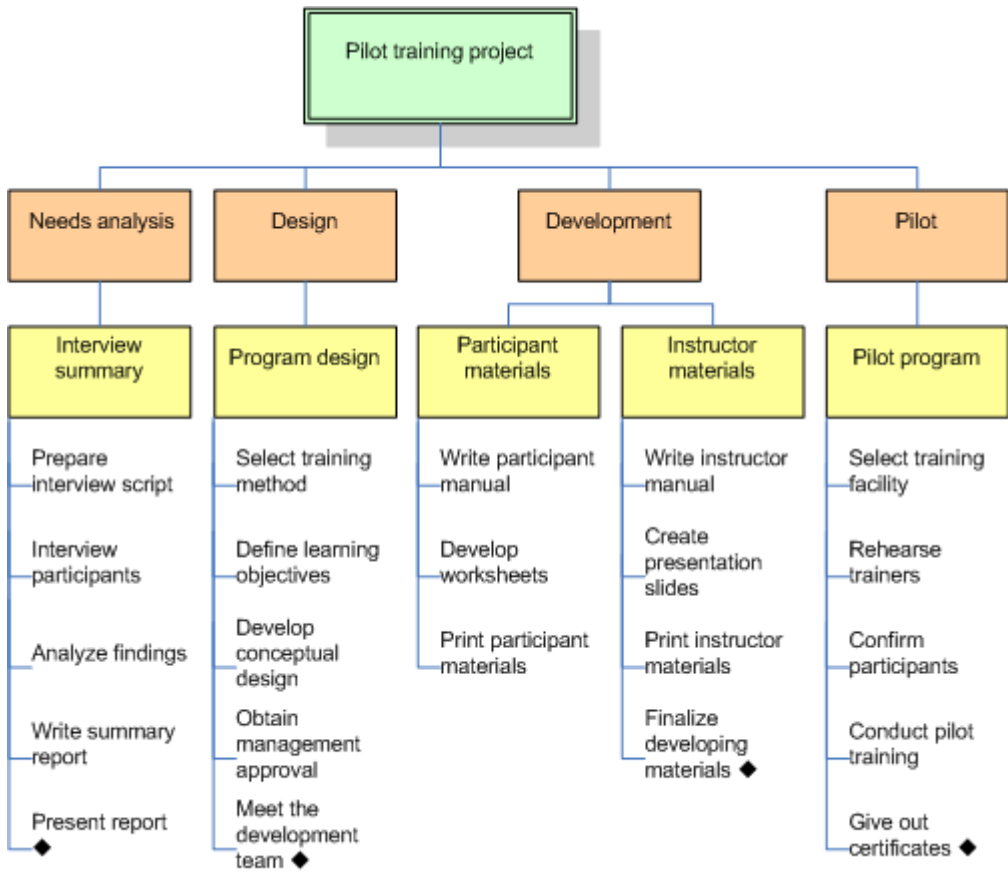
The second step is to select a phase that you are most familiar with. Using the sticky notes, develop a list of deliverables that must be produced to complete the selected phase. Discussions among the team members will generate the most comprehensive list. Remember to use a noun to describe each deliverable. The following figure depicts the deliverables-level WBS for our pilot training project



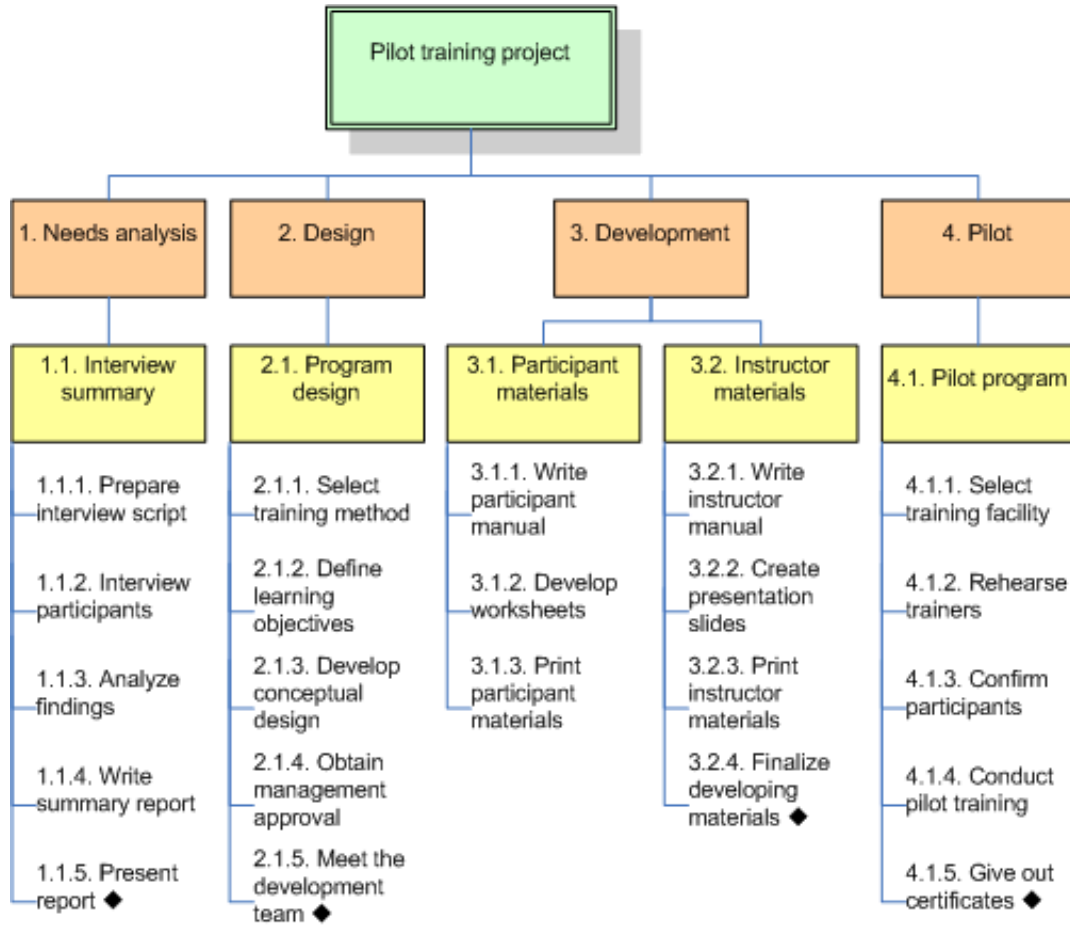
Task-Level Decomposition

The next step is to break each deliverable into the tasks needed to complete it. To identify tasks, again the sticky notes work best. Be sure to use a verb to describe each task. As a task is defined, write it on a sticky note and place it under the associated deliverable. Continue this process until the team cannot think of any more tasks for the deliverable in question. Now, move to the next deliverable and decompose it into its associated tasks. Continue the process until all of the deliverables have been decomposed.

The figure below is an example of a task level WBS. Please note that some tasks have a diamond-shaped symbol next to it. They represent so-called **milestones**. A milestone is usually an indicator of significant progress in the project. It is a scheduling event that signifies the completion of a major deliverable or a set of related deliverables. Its duration is usually very short or even 0.



The next step is to tag each deliverable with a numeric identification. A very important point to mention here is that these are simply *identification* numbers of various deliverables and the numbers *do not* imply the order of development of these deliverables. Now you can tag tasks with individual identification numbers. Define the "parent" and "child" relationships between each deliverable and its tasks.



The various task IDs do not imply the execution order of the tasks. Later, when we convert this WBS into a task network, a higher numbered task may actually precede a lower numbered task. This can be confusing to some people, especially those who are very committed to using lists. Keep in mind that in a WBS and a task network, task IDs are simply identification tags, nothing more.

Further explanation



Soon after the numbering has been completed and the task network has been entered into the project management software, one may discover that the task sequencing was incorrect and some of the tasks need to be moved around. To keep the various task IDs in sequential order, one will need to renumber all of the related tasks.

While reviewing a task network, or later when actually doing the work to complete a set of tasks, one may discover that new tasks need to be added to the task network or some of the existing tasks need to be discarded. This will also require renumbering the related tasks.

If one is totally committed to matching the task IDs with their order of execution, each of the two events in the list will mean spending a lot of time with the software package just to keep the task IDs in sequence of their execution—not a good investment of time. The point at which you number the various tasks is up to you, but *do not* associate a task ID with its order of execution, and make sure that anyone who reads a WBS, or a task network, understands the reason for assigning IDs to tasks: purely for the purpose of identification.

Order of WBS Decomposition

Among the questions frequently asked by project managers and team members new to the process of developing a WBS are:

- Should I start at the highest level and then progressively break the WBS into subsequent levels of detail? This is known as the top down approach.
- Is it OK to start from the lowest level of detail (tasks)? When sufficient tasks have been defined, can I group them into deliverables and then into phases? This is known as the bottom up approach.

The answer to both questions is "yes." There are no specific rules and regulations regarding the order in which one goes about developing the various components of a WBS. Our advice is to use the approach you are most comfortable with and don't force others to follow your approach to the letter. Consider the creation of a WBS a brain storming session, the intended result being a comprehensive WBS for the work at hand.

Level of WBS Decomposition

Another interesting question often raised by project teams is, "When does one know that a given deliverable has been broken into the right number of tasks?". It might be difficult for an inexperienced project manager to set an appropriate level of details. As a help the following question might be used. A "yes" answer to these questions means that the WBS has been decomposed to the appropriate level of detail.

1. Will the team members assigned to the project be able to understand what the task is and what they need to do to complete it?
2. Is it possible to develop accurate and viable estimates from the WBS?

One of the key reasons to develop a WBS is to help the team create realistic task effort, cost, and duration estimates. The larger the task, the more inaccurate the estimate. For tasks that are estimated as more than forty hours of effort, Gopal Kapur suggests further decomposition.

3. Will the project manager be able to monitor task completions effectively?

For any project to be successful, the project manager must be able to monitor its status accurately and in a timely manner. Typically, project managers hold weekly project status meetings; therefore, the expectation is that most tasks should be able to be completed in a week's time. Again Gopal Kapur suggests a limit of ten days for task duration because tasks that take longer can be difficult to monitor, especially when team members are not able to complete their assignments in the allocated time periods.

Implementation of the WBS in a project management tool

The online learning kit developed within the frames of the project illustrates with the use of animation, how to implement the WBS in the project management software (in Microsoft Project).

Conclusions

To summarize the discussion on WBS, focus on the following important points:

- A WBS is not a plan. It is a list of ingredients for the project.
- When creating a WBS, do not spend time trying to put tasks in their order of execution. This is a waste of time, which will become apparent when you try to develop a network diagram.
- Without a detailed WBS, the probability of missing crucial details during planning, estimating, and scheduling is high. This results in tasks actually being discovered as the work progresses, resulting in last minute scrambling to finish the newly discovered work.

2. Time estimates

Accurate time estimation is a skill essential for good project management. It is important to get time estimates right for two main reasons:

1. Time estimates drive the setting of deadlines for delivery and planning of projects, and hence will impact on other peoples assessment of your reliability and competence as a project manager.
2. Time estimates often determine the pricing of contracts and hence the profitability of the contract /project in commercial terms

Often people underestimate the amount of time needed to implement projects. This is true particularly when the project manager is not familiar with the task to be carried out. Unexpected events or unscheduled high priority work may not be taken into account.

Project managers also often simply fail to allow for the full complexity or potential errors and stuff ups, involved with a project.

Step 1 – Understand the Project Outcome

First you need to fully understand what it is you need to achieve. Review the project and its tasks in detail so that there are no ‘unknowns’. Some difficult-to-understand, tricky problems that take the greatest amount of time to solve.

Step 2 – Estimate time

When you have a detailed list of all the tasks that you must achieve to complete the project then you can begin to estimate how long each will take. Make sure that you also allow time for project management administration, detailed project, liaison with outside bodies’ resources and authorities, meetings, quality assurance developing supporting documentation or procedures necessary, and training.

Also make sure that you have allowed time for:

- Other high urgency tasks to be carried out which will have priority over this one
- Accidents and emergencies
- Internal/external meetings
- Holidays and sickness in key staff/stakeholders
- Contact with other customers, suppliers and contractors
- Breakdowns in equipment
- Missed deliveries by suppliers
- Interruptions by customers, suppliers, contractors, family, co-workers etc

These factors may significantly lengthen the time and cost needed to complete a project. You can lose a great deal of credibility, and money, by underestimating the length of time needed to implement a project. If you underestimate time, not only do you miss deadlines, you can also put other people under unnecessary stress [EzineArticle, Liz Cassidy].

Now let’s estimate time needed to complete each task in our pilot training project. We will estimate time using a day as a basic unit. As a result a following table was prepared.

| Task name | Duration (days) |
|---------------------------------|-----------------|
| 1.1. Interview summary | |
| 1.1.1. Prepare interview script | 5 |



| | |
|--|----|
| 1.1.2. Interview participants | 2 |
| 1.1.3. Analyze findings | 5 |
| 1.1.4. Write summary report | 3 |
| 1.1.5. Present report ♦ | 1 |
| 2.1. Program design | |
| 2.1.1. Select training method | 2 |
| 2.1.2. Define learning objectives | 1 |
| 2.1.3. Develop conceptual design | 10 |
| 2.1.4. Obtain management approval | 3 |
| 2.1.5. Meet the development team ♦ | 1 |
| 3.1. Participant materials | |
| 3.1.1. Write participant manual | 20 |
| 3.1.2. Develop worksheets | 5 |
| 3.1.3. Print participant materials | 2 |
| 3.2. Instructor materials | |
| 3.2.1. Write instructor manual | 5 |
| 3.2.2. Create presentation slides | 5 |
| 3.2.3. Print instructor materials | 2 |
| 3.2.4. Finalize developing materials ♦ | 1 |
| 4.1. Pilot program | |
| 4.1.1. Select training facility | 2 |
| 4.1.2. Rehearse trainers | 5 |
| 4.1.3. Confirm participants | 10 |
| 4.1.4. Conduct pilot training | 20 |
| 4.1.5. Give out certificates ♦ | 1 |

The online learning kit illustrates with the use of animation, how to add time estimates in the project management software (in Microsoft Project).

3. Task Network and Gantt Chart

A piece of information that is still inherently missing from a WBS is the specific logical order in which various tasks should be executed. To establish a viable sequence, you need to create a task network that depicts the logical execution order of tasks and/or a Gantt chart. A task network is to a WBS what a recipe is to a list of ingredients: a depiction of the various tasks of a project in their logical execution order. A network depicts the logical sequence and concurrence of various deliverables, tasks, and milestones in a project. The network is built by analyzing the order in which various tasks can be executed. Initially, the network is drawn without regard to any constraints, which are accounted for during subsequent revisions. Some of the other commonly used terms for task network are “PERT chart,” “PERT network,” “precedence chart,” or “precedence diagram,” and “task flowchart.”



Two methods for constructing a task network

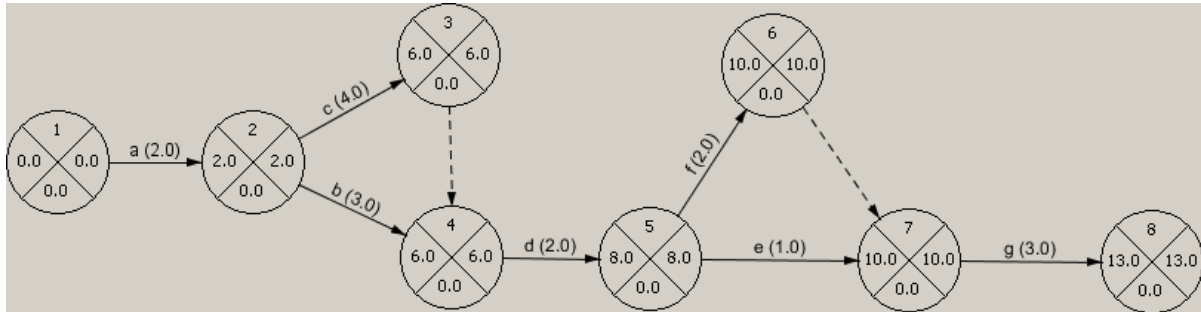
The two most common methods for constructing a task network are:

1. Activity-on-arrow method
2. Activity-on-node method

Activity-On-Arrow (AOA) Network

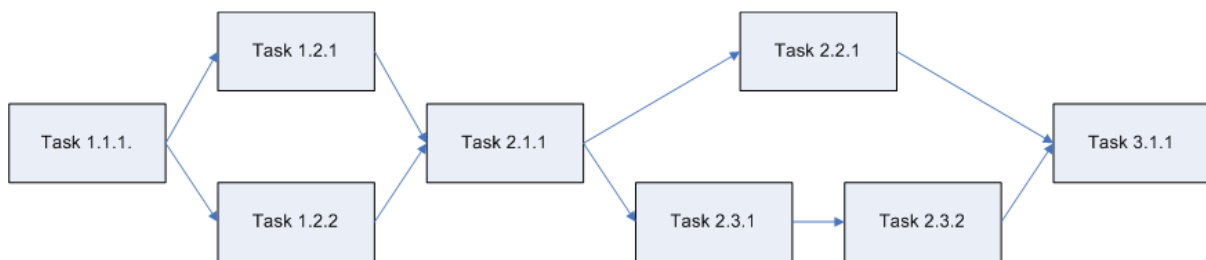
In this network, tasks are shown as connecting lines or arrows between events, which are shown as small circles. The length of the line has no particular significance. Typically, each task's ID and/or description are written above the line, and the task effort and/or duration is written below the line. This method requires the use of dummies (dashed lines) to indicate additional dependencies across tasks. Because of the need to use dummies, as well as the advent of computer software (most of which had trouble drawing AOA networks), these networks are seldom used in the profession and are not discussed in any more detail in this unit.

Example of AOA Network:



Activity-On-Node (AON) Network

The following figure depicts a network using the activity-on-node (AON) method.



In this method, each task is represented *inside* a box (node) and lines are used to show dependency relationships among various tasks. Typically, each box contains the ID and/or the name of the task, task effort, task duration, and the individual responsible for the task.

A Gantt chart

A Gantt chart is a horizontal bar chart developed as a production control tool in 1917 by Henry L. Gantt, an American engineer and social scientist. Frequently used in project management, a Gantt chart provides a graphical illustration of a schedule that helps to plan, coordinate, and track specific tasks in a project. Gantt charts may be simple versions created on graph paper or more complex automated versions created using project management applications.



Predecessor – it is a task that must be completed before a specified task can begin.

Let's go back to our pilot training project example and try to define all relations between available tasks. Again the use of sticky notes with previously written task names might be very useful here. You might want to re-allocate them according to the logical relations between them. After identification of all relations between task a following table can be prepared (of course your version might be slightly different than this one).

| Task name | Duration (days) | Predecessor(s) |
|--|-----------------|--------------------------|
| 1.1. Interview summary | | |
| 1.1.1. Prepare interview script | 5 | |
| 1.1.2. Interview participants | 2 | 1.1.1. |
| 1.1.3. Analyze findings | 5 | 1.1.2. |
| 1.1.4. Write summary report | 3 | 1.1.3. |
| 1.1.4. Present report ◆ | 1 | 1.1.4. |
| 2.1. Program design | | |
| 2.1.1. Select training method | 2 | 1.1.5. |
| 2.1.2. Define learning objectives | 1 | 2.1.1. |
| 2.1.3. Develop conceptual design | 10 | 2.1.1. |
| 2.1.4. Obtain management approval | 3 | 2.1.2. ; 2.1.3. |
| 2.1.5. Meet the development team ◆ | 1 | 2.1.4. |
| 3.1. Participant materials | | |
| 3.1.1. Write participant manual | 20 | 2.1.4. |
| 3.1.2. Develop worksheets | 5 | 3.1.1. |
| 3.1.3. Print participant materials | 2 | 3.1.2. |
| 3.2. Instructor materials | | |
| 3.2.1. Write instructor manual | 5 | 3.1.2. |
| 3.2.2. Create presentation slides | 5 | 3.1.2. |
| 3.2.3. Print instructor materials | 2 | 3.2.1. ; 3.2.2. |
| 3.2.4. Finalize developing materials ◆ | 1 | 3.1.3. ; 3.2.3. |
| 4.1. Pilot program | | |
| 4.1.1. Select training facility | 2 | 2.1.4. |
| 4.1.2. Rehearse trainers | 5 | 3.2.4. |
| 4.1.3. Confirm participants | 10 | 2.1.4. |
| 4.1.4. Conduct pilot training | 20 | 4.1.1. ; 4.1.2. ; 4.1.3. |
| 4.1.5. Give out certificates ◆ | 1 | 4.1.4 |



The online learning kit developed within the frames of the project illustrates with the use of animation, how to define predecessors and generate a Gantt chart and a network diagram in the project management software (Microsoft Project).

The Gantt chart and network diagram might be quite lengthy, especially in case of complicated projects. In such case it is very advisable to print out all small pieces of each diagram and then put them together on a table. With these diagrams you will be able to easily see what are the dependences between activities in relation to the calendar. Thus they are an indispensable tools for managing and managing projects as well as adjusting the work plan to the new circumstances.

4. Critical path calculation

Once the Gantt chart and the task network have been created and the estimated duration values for various tasks have been computed, you can compute the estimated project duration. Begin the estimating process by identifying the critical path through the network using the critical path method (CPM). By definition, the critical path through a network is the collection of tasks that represent the longest path through the project—the earliest the project can be completed. In order to delineate the critical path through a project, one needs to take the following steps:

1. Keeping in view the various task dependencies, identify all of the possible paths through the project task network.
2. Compute the net time to complete the tasks of each path.
3. Identify the longest time.

The *longest* time is the critical path. Because a given project can be made up of a number of linked tasks with sequential, parallel, and other more complicated dependencies and lags, even a small project can have many paths through it. A critical path computation using the steps outlined above would be quite complicated and time consuming.

A better way to identify the critical path is to use a set of well defined computations called the forward path and backward path method.

Additional readings

To compute the project estimated duration, and start/end dates for each task you can use a set of well defined computations called Forward Path an **Backward Path Computation**.

Example: [https://www.dramatispersonae.org/DesignEconomics/cpmNotes\(ToddHeadon\).pdf](https://www.dramatispersonae.org/DesignEconomics/cpmNotes(ToddHeadon).pdf)



The online learning kit developed within the frames of the project illustrates with the use of animation, how to apply critical path method in the project management software (Microsoft Project).

Multiple Critical Paths

In any given task network, there can be times when multiple paths compute to the same amount of time duration (there are *multiple* critical paths). This simply means that a larger number of tasks have no slack/float and if any one of these tasks is delayed (takes longer than planned), the project will be delayed.

Near-Critical Path

On occasion, a group of tasks on a given path through the project has little float. This means that although this path's duration does not compute exactly the same as the critical path, it is very close to it. The implication here is that if the tasks on a given near-critical path take longer than estimated, it could then become the critical path.



1.2 Germany

1.2.1 Partnership Selection

Encountered Problems:

- Partners cannot fulfil their proposed role (either because they are not really fit in the topic, they are financially not sound, or have no experience in project work, etc.) and have to be exchanged.
- Incompetent partners threaten the whole partnership as a team.
- Projects might deliver poor results.
- Projects might ultimately fail, if key partners fail due to wrong selection.

Recommendations:

1. Use your social/business/project networks. If your closer colleagues can't recommend a partner, they might find a partner within their networks.
Advantage: you get a personal recommendation, usually a name (plus telephone and e-mail) you can address and a person's name as a go-between (xxx recommended you to me ...)
2. Browse for projects that deal with a similar topic in the internet. If some institutions or names appear more often, they might be potential partners.
3. If you have identified a potential partner by method 2, ask the co-ordinator of such a project about the partner. Was s/he satisfied with the work, was the partner co-operative, good points versus not so good points, etc.
4. Try to involve - if possible - at least one partner you know and you can rely on. As co-ordinator you might need a closer partner you can do planning and discussions of things with and who can take your part/role (if necessary in case of illness or simply in order to give you a break from time to time)
5. If you need to involve a totally unknown partner, ask the appropriate national agency or the Commission about their experience with the partner. If they do have some experience, they will tell.
6. If approach by e-mail doesn't work or isn't answered, don't be afraid to phone the potential partner. Usually, you'll find these people quite helpful, and very often they can recommend another potential partners.
 - Be prepared that the recipient at the other side (secretary, reception) might not speak English. Some basic sentences in the foreign language do help.



- Prepare a list of topics you would like to discuss or ask.
 - Prepare a summary of the project and its proposed goals and products.
 - Prepare a definition or explanation of the partner's role.
 - Quite often at that stage, you cannot tell the amount of commitment and funding the partner is going to get (in case of European projects), but you can explain what is being funded (travel, staff costs, etc.) and if there is any own contribution.
7. Try to gather more information of the partner and especially the people the partner likes to involve. The partner info required by the LLL programme can be used as a template.

Advantages:

Higher probability of project success, more effective project team, development of network of reliable partners.

1.2.2 Applicant Dreamteam

Encountered Problems:

- The person who wrote a project application was not available when the project started. Thus, another person (with a different background and a different outlook - this is not my project or my kind of an idea) had to get familiar with the project, its structure, goals and products.
- Sometimes, being a co-ordinator can be a very lonely job.

Recommendations:

1. Try to involve another person in your institution in project application. Exchanging ideas and getting feedback in that phase is really important. If time is tight, s/he is able to help out. And once the project has been approved, s/he can support you or take over if necessary.
2. Try to involve a partner you can trust in the project application phase. Exchanging ideas and getting feedback in that phase is really important. If time is tight, s/he is able to help out. And once the project has been approved, s/he can support you or take over if necessary.

Advantages:

Shared workload, initial phase of actual project work is easier (there are at least two people who understand the project), maybe even shared responsibilities.

1.2.3 Pre-Project meetings or partner involvement

Problems Encountered:

- Partners didn't know the project proposal (precise partner role, division of work, project goals and products). Therefore it took a longer time at the beginning of a project to come to a common understanding about the project.
- Partners found out (too late) that they were not really qualified or suited for the job.
- The co-ordinator underestimated the amount of working time for partners' project tasks, simply because s/he was no expert in the field and didn't ask beforehand.
- The project proposal was of poor quality, because the experts in some fields (the proposed partners) were not really involved in the application phase.

Recommendations:

1. Take your time when developing an idea and writing/creating an application.
2. Take your time when writing/creating an application.
3. Take your time !!!
4. If possible, organise face-to-face pre-project meetings or workshops to develop the project idea and plan partner roles and products.
5. If a face-to-face meeting is not possible, try to organise on-line meetings or chats.
6. Define clear structures, topics and goals for these meetings. If possible, involve a mediator who co-ordinates these meetings while the other partners concentrate on the topics and content.

Advantages:

Pre-meetings and early partner involvement increases identification of the partners with the project. Furthermore, the partners get to know each other before the actual project starts

1.2.4 Think the Unthinkable

Problems encountered:

- (Your) new ideas/products do not fit the company's portfolio and are rejected by management.
- Project proposals lack the innovative aspect.

Recommendations:

1. Try your idea with potential project partners. If they like the idea (and think it's feasible), go for it.
2. Projects have a life span of 3-4 years (from application to final report and approval). Usually, management has no idea what the own portfolio will look like in 3 to 4 years time. Together with positive feedback from partners and funded product development (offering opportunities for new business areas) you should be able to get support from management.
3. Don't reject or suppress strange project ideas in your institution. Give every idea its chance.

Advantages:

New and “strange” ideas get the attention and interest of the evaluators of the application. If the partnership is a good and fitting one, the project has a good chance of approval.

1.3 Greece

1.3.1 Communication

Communication constitutes one of the major aspects connected to international projects. It is through the communication processes that conceptual frameworks transform to project proposals and that project proposals are developed and thereafter implemented. As it is well known communication takes various forms and is of different types. Likewise, the communication processes in a project can be altered from phase to phase.

Communication in the implementation of large type of projects i.e. involving more than six partners, is not as easy and straightforward as it might appear at the level of preparing an application. This is due to the fact that individuals of different backgrounds, various levels in the hierarchy of an institution, diverse personality profiles and roles in relation to the project implementation are merged into a single group called to realize ideas into practice. The differences in the human resources of a project either directly or indirectly affect the communication processes and are transversal to the various types of communication channels decided to be used by a project.

Projects have tight time schedules and defined tasks to perform. When the diverse groups of people come together each one brings into it his/her own culture of work preference. Embedded in the process are interaction patterns that in spite of rules set forward by the project itself are driven by the attributions of the individual participants such as interest on the work activity, personal motivation, the need for personal visibility within the group, one's sense of responsibility and others. These can prove powerful enough when not attended to, to shift the power of balance within a project as well as within a partner institution.

Such a shift –especially in medium- large and large project consortia causes disturbance for the coordination team and that's both at the overall and task specific levels. This has as a consequence unnecessary exchange of discourse that can have implications on personal relations and the smooth execution of the work plan.

In order to avoid the emergence of conflicts within the partnership and within the individual partner institutions the clustering of individuals according to roles these come to play in the project has proven to be a good practice.

What are the levels for communication?

In transnational projects each partner institution assigns an individual to represent it in the Consortium. At the stage of implementation other individuals from that same partner institution participate for the execution of specific tasks. Their role varies according to the workplan requirements. These can be called to perform specific specified tasks or can be active in the lifecycle of the project. As project products and processes applied or put in place should become visible to the project's stakeholders it is common for projects to allocate human resources to concentrate their activity on promoting the project outcomes. While one of the partners leads the WP on

dissemination and or exploitation all members of the consortium have (or should have) active role in promoting the project and its results. This directly or indirectly forms a specific group with common goals to pursue in a partnership. Each partner institution further allocates human resources to be engaged in the monitoring and reporting of project resources.

From this clustering it becomes evident that there are four levels at which a project –via the coordinator, communicates with its partners.

- A. Project Level
- B. Work Activity/ies Level
- C. Administrative Level
- D. Promotional Level

When should a project consider the different levels in its communication structure?

A project before its initiation should reflect on how to most effectively and efficiently organize its resources under the prism of its work plan and expected results. It is at the stage of project activity initiation that the leading individuals come to form the first cluster of human resources. Usually this team takes the name of Project Management Committee or similar. This team ought to assist the coordinator in putting together a communication level strategy. Such a strategy can consider the clustering of project human resources in terms of

- Decision making
- Thematic orientation(s) of project tasks

The coordination team in the process of putting in place the communication mailing lists, or granting access rights on collaborative work spaces should

- define the levels of the project's communication structure
- provide a rationale as to the structure of the communication level
- inform all members of the given cluster and the members of the higher level cluster as to who are the individuals within that level of communication
- prepares the relevant e-mailing lists or gives access rights to individuals
- initiate introductory discussions within each cluster.

Who benefits from defining different communication levels?

- The project itself as avoided are disturbances due to undefined roles, responsibilities and overload of information exchange



- The partner institutions as these are called to enhance their capacity for teamwork
- The individuals participating in the project as their contribution becomes evident at the level of their role in the project. This can facilitate security build up as individuals are called to communicate with others engaged in work of similar scope.

1.3.2 Shadow Coordination

The coordinator in an international project is responsible for the efficient and timely organization of the project and its activities.

This translates to a number of tasks that need to be addressed either in a linear or intertwining / synthetic way.

In projects that are either tight in their schedule i.e. short term impact type of studies or explorative type projects, or project that involve many partners and/or are multidimensional it is not always feasible for the coordinator to effectively perform his/her duties or at best to be on top of issues that emerge and at the same time guide the project activity/ies and resolve issues that arise. This is critical for the smooth operation of the project and has serious consequences on a number of parameters ranging from the continuation of the project under the agreed terms to the relations between the consortium members.

A solution to the problem – even before it arises in a project, is to assign a shadow coordinator. Such an assignment also facilitates efficiency in medium size projects as it enhances the management capacity.

What is the role of the shadow coordinator?

A shadow coordinator is a partner preferably responsible for the quality assurance / evaluation component of the project. This is preferable because the partner responsible for evaluation is the partner that knows the project “well” in terms of the interrelations between the project components / dimensions. Under such a scope the shadow coordinator is well equipt with information on the processes of project development to “step in” at any point in time in the lifecycle of the project.

The shadow coordinator plays two basic roles in an international project.

- a. Monitors the performance of the coordinator in relation to the implementation of the work plan, and
- b. Facilitates the project in terms of short term need for coordination.

These roles are by no means distinct from each other. They complement each other if viewed from the perspective of quality assurance.

When is the shadow coordinator needed?

The role a shadow coordinator will play in a project is dependent on the dynamics behind the process of implementation of the project (complementing the principle coordinator’s management skills and competencies with available expertise within the partnership), and the decisions taken by the partnership to ensure the smooth execution regardless of possible emerging constraining factors (coordinator’s performance levels, unforeseen issues i.e. IPRs, review results, and even continuation of the project activity beyond the lifecycle of the project).

Under this scope the shadow coordinator is needed in relation to the following:

- A. Problems relating to the principle coordinator

- Withdrawal of the principle coordinator (this can occur due to health reasons, professional development, employment reasons, etc)
 - Necessity for temporary absence of the principle coordinator
 - Slippage of interest on the project by the principle coordinator
- B. Enhancing the coordination capacity of the project
- As a consequence of project reviews
 - As a decision of the PMC
 - As a felt need to link project components
 - As a means to increase visibility of the project and its results
- C. Ensuring quality of project processes and products
- Clarification of project objectives and work tasks
 - Reinforcement of a collaborative spirit within the various groups of an international project
 - Resolution of conflicts before these affect the project
 - Reflecting on the performance of the coordinator and advising accordingly

What is the profile of the shadow coordinator?

As indicated above the shadow coordinator must have an overview of the entire project and how its components come together to suggest an integrated activity. It is imperative that the shadow coordinator has a common understanding of the project goals and a similar vision into the impact / effects of the project on its thematic area as that of the coordinator. Likewise, the processes applied –whether methodologies or practices, must be reflected and agreed upon with the principle coordinator so that the shadow coordinator can defend to third parties the rationale behind choices made by the project.

In general the profile of a shadow coordinator must bear the following characteristics

- The relationship of the shadow coordinator has emerged in previous collaboration with the principle collaborator –and preferably with other members of the partnership
- Has experience in project coordination
- There is mutual respect between the principle and the shadow coordinator
- The relation between the principle and shadow coordinator must be free of competitive tendencies



- There must be complementarity of skills and attitudes between the principle and shadow coordinator
- The partnership members accept the shadow coordinator as a person that has a vested interest in the effective implementation of the project, is highly devoted to the implementation, is effective in dealing with interpersonal relations (implying fairness).

1.3.3 Monitoring

It is widely recognized that monitoring is indispensable for good project management.

Monitoring is an on-going activity that tracks project progress against what was planned. It is a regular collection, analysis and use for learning of information. Monitoring gives response to the question: “Are we doing things right”?

In order to perform robust monitoring, an adequate plan should be created already in a planning phase and integrated in the project. Monitoring plan should answer the following questions:

What: What information needs to be collected and analyzed?

How: How information will be collected and analyzed?

Who: Who will be responsible?

How much: Human and financial resources

When: Schedule for data collection and analysis¹²

It is important that information gathered through monitoring is organized and shared. All project partner should have access to it. This can be done in a form of a report that would present the monitoring findings.

Methods for collecting information for monitoring and evaluation are various. Among others they are: reports, minutes, financial statements, recorded observations, diaries, structured questionnaires, interviews, focus groups, peer review, visits, etc.

Below is an example of a monitoring questionnaire¹³. Such a questionnaire can be e-mailed to a project partners and be a basis for a monitoring report.

1. Work activity

1. Describe briefly the work you’ve undertaken for the current period
2. Describe the work completed in this period
3. Describe the problems encountered in completing the work undertaken
4. Describe the obstacles in addressing both the work undertaken and project specific issues/objectives
5. Describe deviations from the original work plan (and their justification)
 - for your institution
 - for other members of the consortium

2. Coordination of the work

¹² David Rider Smith, Monitoring and Evaluating ... from inputs to results; presentation assessed on line www.undp.org/eg/documents/.../ME%20presentation%2012May05.ppt

¹³ PREDIL Promoting Equality in Digital Literacy, Evaluation Criteria. Overview, n.d.

1. Were you periodically (and adequately) informed of project developments?
2. What is your source of information regarding
 - the project as a whole
 - specific project activities
3. Have the tasks undertaken by the coordinating institution and the other partners been successfully addressed?
4. Express your views on the communication process (from both technical and interpersonal perspectives)
5. Report on how your investment (time + resources allocated to the project) related to the allocated budget
6. Other comments on management/coordination issues

3. Application results/modifications

1. Given your experience in the project, what do you regard as the project's two main operational objectives for the next phase of the project?
2. Given your experience in the project, indicate the methodological changes that you feel need to be made in order to address the project's objectives within the next months?
3. In your opinion what is the "new knowledge" that has been generated in the frame of the project until now?
4. Indicate means for disseminating this "new knowledge"
5. Propose changes (any kind, including changes in roles and responsibilities of persons) that you feel are required in order to successfully complete the project
6. State any difficulties you feel might arise in the application of the project

4. Other issues

1. State issues that you think should be addressed in a next project meeting
2. State anything else you feel should be included in the internal evaluation

Bibliography:

1. David Rider Smith, Monitoring and Evaluating ... from inputs to results; presentation assessed on line: www.undp.org/eo/documents/.../ME%20presentation%2012May05.ppt
2. PREDIL Promoting Equality in Digital Literacy, Evaluation Criteria. Overview, n.d

2 Bad practices

2.1 Project work versus team work – different partners' expectations

An institution joined a project without knowing in advance its project coordinator. It turned out that the coordinator and his way of implementing the project did not meet expectations of the partner institution. The later complained that could not push forward any of its ideas. Additionally communication between them failed. As a result a partner institution withdrew from the project.

Problem diagnosis

The problem arose from misunderstanding between both institutions on the manner the project would be implemented. This was worsen by not constructive conflict management.

Frequently, international partnerships involve institutions with different business models, different style and culture of work. Generally, speaking project can be handled in two manners called project work and team work.¹⁴

Project work is more technical and task oriented, concentrated on allocating tasks and producing results, whereas team work is more process oriented putting more attention on human element. Consequently the role of a project coordinator is different in both cases:

- In the project work the project manager acts as a “director”. He/she takes responsibility for all major activities and outcomes. Only partial tasks are assigned to other project members.
- In the team work the responsibility over the project is shared and the project coordinator acts as a leader.

This distinction between good management and good leadership is often neglected causing misunderstanding problems as in the above described example. Good management is about correct budgeting, institution and control. Leadership is about influencing other people, aligning people, motivating them and inspiring.¹⁵ Thus, a weak leader can be a good manager and vice versa a strong leader can be a bad manger. The project leading institution was concentrated on simply managing the project, i.e. achieving concrete targets through project work, rather than leading the project, whereas the partner institution expected more team oriented work.

¹⁴ Bienzle H. (2001), “A Survival Kit for European Project Management. Advice for Coordinators of Centralized Socrates Projects. 2nd edition: For projects of selection round 1-3-2001 and later”, 2001, Oberwart, www.sokrates.at/survivalkit

¹⁵ Geddes J. Project Leader or Project Manager, Which One Are You?, assessed on line <http://www.projectsmart.co.uk/project-leader-or-project-manager.html>

The misunderstanding between both institutions led to a conflict that was not solved in a proactive manner that could result in a new common understanding.

As authors of a toolkit for European Project Management¹⁶ rightfully notice conflicts are natural things when people work together. Conflicts should not be always seen as failures. If conflicts are managed in a positive way, they can contribute to a personal and institutional learning. Authors remind also that conflicts are nearly always related to a failure in communication. Therefore it is important to understand that communication takes place at three levels:

- Rational related to content, themes and topics
- Emotional related to relationship between people
- Structural related to the framework around communication: situation, time available, location, social situation.

Conflicts should be held on a rational level, keeping people in high esteem (emotional level). In order to tackle a conflict a win –win situation should be reached for all parties involved. In the presented case study the partner institution withdrew from the project as most likely they felt they had lost in a conflict.

Recommendation:

1. Be aware that the way of handling projects can be different across institutions.
2. Explain your expectations and working style of your institution to your partner.
3. Achieve a common understanding on how you will be working together
4. Remember that conflicts are natural and if managed in positive manner can result in good outcome. A key to a successful conflict solving is creating a win – win situation.

Bibliography:

1. Bienzle H. (2001), "A Survival Kit for European Project Management. Advice for Coordinators of Centralized Socrates Projects. 2nd edition: For projects of selection round 1-3-2001 and later", 2001, Oberwart, www.sokrates.at/survivalkit
2. Geddes J. (n.d) Project Leader or Project Manager, Which One Are You?, assessed on line <http://www.projectsman.co.uk/project-leader-or-project-manager.html>

¹⁶ Bienzle H., op.cit

2.2 Risk management

Factual and anecdotal evidence confirms that international projects are inherently more risky than the domestic ones. Working across boundaries brings complexity further complicated by cultural differences.

Nevertheless, more and more institutions are recognizing benefits offered by embarking on international cooperation. A powerful incentive in this regard is the European Union funding mechanism that prioritises transnational collaboration. Encouraged by the EU funds, institutions are forming new partnerships in countries they do not have experience and with partners they know very little about.

Bad practice:

In order to receive funding from the EC an interviewed organization from Western Europe formed a partnership with an institution from Eastern Europe. The organization reported that many problems arose on the partner side resulting from lack of institutional capacity and experience:

- the partner did not understand its responsibilities nor budgetary rules
- the partner had difficulties to build its national team
- the partner was communicating poorly which resulted in misunderstandings,
- the partner's input was of low quality

As a result, the project implantation was delayed. When coaching efforts also did not bring about a significant improvement, the responsibilities of the problematic partner were delegated to other project members.

Problem diagnosis and recommended actions:

The interviewed institution overlooked risk management. During the implantation too much time was spent on solving problems instead of focusing on main project activities.

Wrona¹⁷ proposes to deal with risk in proactive manner. She advises that ideally the risk management should follow 7 steps process:

Step one: ask each project member to enlist all potential risk situations

Step two: collect all members' lists and compile all items into a single list

¹⁷ Wrona V. (n.d.) Your risk management process; A practical and effective approach; document assessed on line <http://www.projectsmart.co.uk/your-risk-management-process-a-practical-and-effective-approach.html>

Step three: consider the probability of each risk situation to happen by using numerical rating (e.g. on a scale from 1 to 4). Other possibilities include using colours or using descriptive terms as high, medium and low

Step four: identify the warning triggers for each risk

Step five: recognize possible preventive actions

Step six: create a contingency plan

Step seven: determine the owner of each risk, i.e. a person that will be responsible for its surveillance. Very often this role is performed by a project coordinator but depending on a project it might be worth considering aligning different members as owners for specific risk

Risk can be tracked by creating and maintaining a live project risk register (often called a risk log). It can be easily presented in a table composed with the following columns: risk description, probability, impact, detectability, triggers, preventive actions and contingency plan.

It should be stressed that a common mistake of many projects is that the risks are identified only at the begging of the project and never revisited. The risks should be assessed on regular basis adding new risks during the project life. A critical factor is open communication that all members should not hesitate to report their concerns.

Finally a process should not be neither complicated nor time consuming. It should not be a priority so it does divert attention from main projects activities.¹⁸

Bibliography:

1. Ahn L. (2008) 10 rules of highly successful project management; document assessed on line <http://www.pm-now.net/opm05/lb/Authorised%20Papers/OLB05-0001.pdf>
2. Wrona V. (n.d.) Your risk management process; A practical and effective approach; document assessed on line <http://www.projectsmart.co.uk/your-risk-management-process-a-practical-and-effective-approach.html>

2.3 Quality of project leadership

¹⁸ Ahn L. (2008) 10 rules of highly successful project management; document assessed on line <http://www.pm-now.net/opm05/lb/Authorised%20Papers/OLB05-0001.pdf>



In the international projects work, leadership is said to be a critical determinant of team performance and in a consequence a project success.

This section brings together the leaders bad practices to avoid:

- Indecisiveness
- Lack of flexibility
- Not engaging all partners in a project
- Arrogance

1. Indecisiveness

Indecisiveness of a project manager led to a situation where no conclusive decision on the project implementation could be reached for over a year. As a result the project consortium partners started to implement the project independently. Eventually the leading institution changed the coordinator. However the project suffered a delay of over six months.

Desired behaviour: The leader should have a strong vision and assemble the team around it. Individual should be confident in order to successfully facilitate others in the pursuit of common goals.

2. Lack of flexibility

An inexperienced project manager did not want to make practical adjustment in the work plan. He was too much concerned in following literally the initial work plan overlooking that some tasks were already integrated in previous activities. It took a long time for the project members, and only during face to face meeting, to convince him for more flexible approach. The situations again led to the project delay.

Desired behaviour: The leader should be flexible and pragmatic. He/ she should be proactive rather than merely reacting to what happens in the project.

3. Not engaging all partners in project

An interviewed institution participated in a large FP7 project. The leader did not ensure that all consortium members are engaged in the project. Some institutions which worked together previously formed private clubs. Newcomers in the consortium were left aside from the project dialogue and decision making process.

Desired behaviour: The leader should ensure that all partners are successfully integrated in the project for a collective success. Ownership is a driving force of building and keeping motivation. Not ensuring the sense of participation and ownership leads to loss of the motivation and energy in a team.

4. Arrogance

A coordinator tried to enforce his project concept in a paternalistic way and did not take into account the outcomes of the project meetings. As a result the concept was created after only one year and a half. It was only possible, as on one side the leader stopped trying to enforce his opinions, and on the other side partners reduced their involvement in the project. In a consequence the project 's outcome was of low quality.

Desired behaviour: The leader should be open-minded and always looking to learn and improve. Further, the leader should balance his/her perspective with the other members. The manager should first listen to other voices and make the best decisions for the project.

Recommendations

Problem with leadership in a project is more likely to occur when the project application has been developed by the coordinator alone rather than as a shared process. Early involvement in the application process of all project members would be beneficial as it will enable potential partners to assess the characteristics of an appointed project manager. By this, they can share their concern about the project leader with the leading institution and take timely decision on the scope of their involvement or even participation in the project.

As a matter of example, an open list of questions an institution could try to answer when assessing a future manager could be following:

1. Is he/she proactive?
2. Is he/she open to feedback?
3. Is he/she listening other's people ideas?
4. Is he/she communicating effectively?
5. Is he/she able to sustain team spirit?

2.4 Absence of monitoring

This section considers typical and frequently repeated mistake of not implementing monitoring. However without the appropriate monitoring a project is likely to go slower and consume more resources than expected.

Bad practice

The projects without monitoring consumed much more human resources than it was planned. An interviewee's institution participated in a project of approximately twenty five members and ten associates. The project envisaged a significant number of deliverables: 26 reports with an average 200 pages each. The institution spent the resources allocated to this project only just by reading and revising project outputs as there was no regular project monitoring

Problem diagnosis

- The framework for monitoring was not created
- There were no clear guidelines what will be monitored, how and by who
- The project did not allocate sufficient resources for monitoring

Project monitoring

Successful projects do not happen by chance, but they are rather outcome of planned series of activities and events. However, things rarely work out exactly as intended. Hence it is important to monitor a project performance during implementation so as timely adjustments can be made if necessary. Monitoring is even more of necessity in transnational projects as information is dispersed over geographically scattered institutions.

Monitoring it is a regular collection, analysis and use of information. It tracks project progress against planned tasks. Monitoring benefits projects by:

- alerting about potential and actual weaknesses of the project
- informing about underperformance and providing managers with the opportunity to make timely adjustments in the work plan
- enabling managers to identify and reinforce project success
- providing project members with the information on the value of their work
- providing regular feedback to enhance the ongoing learning experience
- providing basis for reporting and evaluation

Recommended actions:

A robust plan at the outset of a project is an imperative for performing a good monitoring. Except small projects monitoring involves significant resources that can be wasted without a clear plan.

A report of WWF¹⁹ provides with valuable conceptual model of four step monitoring plan:

Step 1: Define information needs: considerer which information will be necessary. Very often no or too much information is gathered.

Step 2: Develop monitoring plan: develop indicators and tools that will be used to collect and analyse data to meet information needs identified in step 1.
Summarize the monitoring plan in a table.

Step 3: Prepare for data storage, processing and analysis. Think about who will collect the evidence for the indicators and who will analyse it. Identify who will be responsible for making decisions about changing the project design as a result of lessons learnt.

Step 4: Put the monitoring plan in action: include monitoring activities in a project work plan and budget. Make sure all project members have clarity about what is expected from them.

Important points:

- Ensure time for monitoring activities when planning a project
- Information needs to be organised and shared. Provide each partner with access to it. A tool for this can be a web platform where all partners can upload all documents in password-protected files
- Do not overwhelm partners with monitoring requirements – keep it reasonable
- Remember that the best practice is to ensure that stakeholders are involved in the process

Bibliography:

WWF (2005) Resources for Implementing the WWF Standards. Basic Guidance for Step 2.2 Monitoring Plan; document assessed on line www.panda.org/standards/2_2_monitoring_plan/

¹⁹ WWF (2005) Resources for Implementing the WWF Standards. Basic Guidance for Step 2.2 Monitoring Plan; document assessed on line www.panda.org/standards/2_2_monitoring_plan/

3 Annexes

3.1 Interviewees' answers in Poland

| | INTERVIEW 1 | Problem 1 | Problem 2 | Problem 3 |
|---|--|--|---|--|
| 1 | NATURE | Inability to gain specific data needed for research. | We assumed that every partner would prepare 2 case studies (part of qualitative analysis). Teams from countries where labor costs are high said that they are able to do only 1 case study. | One of the partner didn't fulfill his obligations. He didn't participate in the meetings. Others partners and leader tried to take the next steps in the project (have meetings and make decisions) and then to tell this partner about decisions. The partner didn't accept the decisions. He wanted to have discussion, but the discussion was at the meetings. The project could collapse. |
| 2 | CAUSE | We assumed that we would get the data. We knew that in Poland there are problems with the data but we assumed that in Western Europe there would not be. | This has not been discussed when planning because there was no time. | The lack of previous experience in cooperation with the partner. We knew a person only from conferences and publications. He was well-known specialist in his area. We didn't know we is a person who is so hard to cooperate with. He believed we didn't treat him with esteem. |
| 3 | IMPRECISE PLANNING/PROJECT'S IMPLEMENTATION | Imprecise planning. | Imprecise planning | Imprecise planning |
| 4 | SOLUTION | We used different methods of estimation and made rather qualitative, not | Each country prepared 1 case study | When we finally met with the partner it ended our cooperation in the project because the meeting |

| | | | | |
|---|-------------------|--|--|--|
| | | quantitative analysis. | | transformed into horrible row. After that we cut off this partner budget for the task which weren't completed. |
| 5 | PREVENTION | It is hard to check so detailed information when writing a proposal. | The application should be prepared in agreement between partners. It is hard to do that only by emails. Best idea is to organize a meeting in order to write proposal. | Can not be avoided. But now don't work with the partners who are the best in the area but with the people we can count on. |

| | INTERVIEW 2 | Problem |
|---|---|--|
| 1 | NATURE | Inadequately planned activities (eg dates and duration of meetings). |
| 2 | CAUSE | Foreign experts didn't know Polish conditions. We entered the project when the proposal was ready. We agreed on it but we didn't co-write it. |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | Imprecise planning |
| 4 | SOLUTION | It was necessary to make significant changes in the budget and schedule |
| 5 | PREVENTION | You have to take into account many factors when planning. Partners should have a real influence on the proposal. |

| | INTERVIEW 3 | Problem 1 | Problem 2 |
|---|--------------------|--|---|
| 1 | NATURE | Because we got the ready plan of work and its description we didn't know how to interpret it, how to solve it. We didn't have enough competences' to solve scholar problems. The coordinator agreed to | We had even delays in starting a work because we haven't got a team. We weren't used to a specific style of work. There were also a problem that older team members weren't able to adapt to a situation as fast as younger members. |



| | | | |
|---|---|--|---|
| | | do some work without a knowledge how to do it, which must end in a disaster. We had to grow old to this, to expectations. | That also resulted in problems with communication . I think, that we ended particular meeting, particular talk with completely other conclusions as our foreign partners |
| 2 | CAUSE | It was one, very broad problem- it was the problem of lack of experience but we can also say that this is the lack of competences. I think that it is also the problem of human resources management and these problems are very closely linked. Not understanding the finance, budgetary matters but also not understanding the duties we bound ourselves to perform, not understanding the tasks. Low coordinator's competences. Lack of strictly scientific competences among team members- We haven't conducted many international projects, and we were not able to fulfill our partners' expectations. So it was a huge problem which resulted in delays, put the finalization of a project into a question, taking back the project. It is also that matter that these projects fall into the hands of people who can't organize a team, who can't manage the project. There were no persons who can perform tasks properly. The results of our work were rejected, disputed. | |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | I think the problem is that our partners from western Europe need some partners from central and eastern Europe, because they can't be the only recipients of funds- it's a matter of redistribution of funds. So they search partners in this region not knowing them very well, risking a lot. So, when making a consortium, building relations and searching for experts they had to risk, because they don't have enough information. Also they don't have the possibility to take the persons with appropriate experience because there are simply not such people. | |
| 4 | SOLUTION | As far as it concerns our abroad partners, they were very helpful, and they were solving our problems. At the beginning they were asking questions, trying to determine where is the problem, but it didn't produce any satisfactory effect so they turned to putting pressure on us because they must get our part of work. They tried to mobilize our coordinator to take some steps, to find experts. But finally they took some responsibility on themselves- the delegated two or three researchers to support us | |
| 5 | PREVENTION | Persons responsible for coordination, for taking decisions should be selected more carefully. They must have abilities to organize a team, to motivate members, to manage everything. Younger, more flexible. | |

| | INTERVIEW 4 | Problem 1 | Problem 2 |
|---|----------------------------|--|----------------------------------|
| 1 | NATURE | no understanding of coordinator's expectation | delays in project implementation |
| 2 | CAUSE | personality of the leader, dictatorship of project ruling; coordinator did not take into consideration any ideas of the partners | weak leadership |
| 3 | IMPRECISE PLANNING/ | rather project implementation... | rather project implementation... |



| | PROJECT'S IMPLEMENTATION | | |
|---|--------------------------|---|--|
| 4 | SOLUTION | they quited the project... | it is very difficult to change the coordinator – it is a problem!!! |
| 5 | PREVENTION | you have to know the people you are going to cooperate – you should meet the people in person before entering the project | you have to know the coordinator before entering the project to be sure that he/she will be able to manage the project |

| | INTERVIEW 5 | Problem 1 | Problem 2 |
|---|---|---|--|
| 1 | NATURE | Problems with communication between members, The points of view of project partners were often different | Problems with fulfilling the tasks by the team members |
| 2 | CAUSE | Size of the team | Long term project with unexpected changes within the project team Misunderstanding that this is the coordinator's project and that he is responsible for everything |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | None, it resulted from the size of the team- over 20 partners | None, it resulted from the size of the team- over 20 partners |
| 4 | SOLUTION | The whole team was divided into smaller „task-groups“, and the project's coordinator communicated only with the representatives of these smaller groups- it wasn't a direct communication with each team member | The whole team was divided into smaller „task-groups“, Leaders of „task-groups“ were responsible for their part of work and they controlled their groups members |
| 5 | PREVENTION | Division of the team into smaller groups and establishing a leader for each group | Clear specification of the leaders of particular tasks, and these leaders must have strong position to be able to enforce the tasks |

| | INTERVIEW 6 | Problem 1 | Problem 2 | Problem 3 |
|---|---------------|---|--------------------------------------|----------------------------------|
| 1 | NATURE | poor quality of the products | significant delays | not accomplishing the tasks |
| 2 | CAUSE | no capacity – poor merit quality no – time for accomplishing tasks | no adequate monitoring of activities | no capacity – poor merit quality |

| | | | | |
|---|---|---|--|---|
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | Both | project's implementation | imprecise planning (poor selection of the partner) |
| 4 | SOLUTION | good timing planning, change the person responsible for task accomplishing, add a new person to the team | strengthening of the monitoring capacity | change the person responsible for task accomplishing or to do it by coordinator |
| 5 | PREVENTION | better selection of the partners – basing on CVs is very tricky.... it is better to work with the partners you know and you may relay on to control the quality of "semi-products" more frequent contact, contact far before deadlines asking about any potential problems with accomplishing tasks | more frequent contact, contact far before deadlines asking about any potential problems with accomplishing tasks, to have a few days in a reserve... | better selection of the partners – basing on CVs is very tricky.... it is better to work with the partners you know and you may relay on to control the quality of "semi-products" |

| INTERVIEW 7 | | Problem |
|--------------------|---|---|
| 1 | NATURE | Transforming project idea into project conception and activities. Project leader tried to enforce his concept which was quite imprecise. He behaved in paternalistic way and didn't take into account the outcomes of the meetings discussions on the concept. |
| 2 | CAUSE | Idea was wide and project leader had a lack of experience in creating concepts. |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | Hard to say. Rather implementation. The application was written by the leader which is natural (because no partner wants to get involved before proposal approval). |
| 4 | SOLUTION | Project leader stopped trying to enforce his opinions. Partners reduced their involvement. The concept was created after 1.5 years of work. No one was satisfied |

| | | |
|---|-------------------|--|
| | | with it. The results (reports) quality was quite poor. All felt relief that the project has ended. |
| 5 | PREVENTION | Hard to find. |

| INTERVIEW 8 | | Problem |
|--------------------|---|---|
| 1 | NATURE | Delay in publishing a publication, but it was after finishing a project |
| 2 | CAUSE | Organisational and financial matters. The leader didn't assure the right funds and he was forced to seek for finance during the project |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | Imprecise planning. We knew that there will be a publication but for example we didn't know in which country will it be published |
| 4 | SOLUTION | The leader found the funds with the support of team members |
| 5 | PREVENTION | Thinking ahead about finance matters at the stage of planning or even submitting an application. Detailed planning what we expect to be a final product- where it will be published, who will be the reviewer etc |

| INTERVIEW 9 | | Problem |
|--------------------|---|--|
| 1 | NATURE | Reporting not completed on time. |
| 2 | CAUSE | The problem resulted from the nature of the Project in which the coordinator was responsible to the National Agency, while the partners were only responsible to the coordinator. Additional causes could be sought in the assignment of inappropriate people to the reporting tasks (the 'human factor') |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | It could not have been foreseen in the planning stage since it involved proven partners from other projects. Additionally, partnership agreements were drawn up in which the duties and reporting deadlines were precisely laid out. |

| | | |
|---|-------------------|---|
| 4 | SOLUTION | The partners were accurately informed and trained as to how to complete their financial reporting documentation. Another solution was the argument that documents submitted after the deadline or with errors could cause the disqualification of the costs contained within them. |
| 5 | PREVENTION | A meeting with the partners at the start of the project and informing them of the documentation methods. Throughout the project ongoing monitoring of partners indicated any errors in the submitted documents. |

| | INTERVIEW 10 | Problem |
|---|---|---|
| 1 | NATURE | Limited ability to get appropriate staffing, lack of specialists (difficult project content such as 'multiple intelligence') with a budget that has been decreased. |
| 2 | CAUSE | The problem resulted from cost cutting in parts of the budget during the project evaluation stage. |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | It was not possible to foresee at the planning stage, since it was the Implementing Institution which made the budget cuts. |
| 4 | SOLUTION | Certain tasks that had been assigned to one partner were reassigned to other partners (the partner from the less wealthy country did the tasks at a lower cost). |
| 5 | PREVENTION | Appropriate resources which make it possible to distribute tasks between partners and for them to be carried out at the appropriate level. |

| | INTERVIEW 11 | Problem |
|---|---|---|
| 1 | NATURE | Risk of joining a project with one of the partners |
| 2 | CAUSE | Lack of the desire to cooperate. The project is not a priority for one of the partners. |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | The lack of desire to cooperate results from a lack of understanding of the project (limits in accordance with the project's directives). A high number being done by this partner lead to the fact that this project was not a priority for this partner. |
| 4 | SOLUTION | The partner was carefully informed of the rationale and arguments by the leader. The leader based their conversation solely on the directives of the project's call program directives and the achievement of the project's goals. |
| 5 | PREVENTION | Meetings with the partners at the start of the project and throughout the entire project. Ongoing review of specific project stages and the achievement of milestones. Throughout the project ongoing monitoring of partners and ongoing identification of eventual threats. |



3.2 Interviewees' answers in Greece

| | | Problem 1 | Problem 2 | Problem 3 | Problem 4 |
|---|---|--|--|---|--|
| 1 | NATURE | Partner's silence in the project | Partner's inability to confirm to decisions reached at project level | Access to national statistics data | On going re-iteration of work plan |
| 2 | CAUSE | Partner's inability to communicate in English | Partner's lack of participation in planning phase and not attending project meetings | Public sector's control of data sources | Insecurity problems of the coordinator |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | Imprecise planning | Imprecise planning | Imprecise planning | Project implementation |
| 4 | SOLUTION | Coordinator asked for a change of person | Change of contract to exclude the partner | Utilized the services of government officials to get access | Dynamic partners took over structuring of the work |
| 5 | PREVENTION | Ensure you know the people that you'll work with | Work with people you know | Work on qualitative research methods | Know with whom you'll be working with |

3.3 Interviewees' answer in Germany

| | INTERVIEW 1 | Problem |
|---|---|--|
| 1 | NATURE | Expected and needed knowledge couldn't be given within the partnership. It took a longer time until this was clear. |
| 2 | CAUSE | Preparation and communication during the project planning was not good enough |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | Planning |
| 4 | SOLUTION | Coordinator had to redesign the project. Partly new partners joined the project, some origin partners have left the project. |
| 5 | PREVENTION | Better Partner selection. Good communication towards the partners in preparation phase. |

| | INTERVIEW 2 | Problem |
|---|---|--|
| 1 | NATURE | Communication and Competences |
| 2 | CAUSE | The competence to speak English is often very weak referring to people from the public sector. Moreover their knowledge regarding instruments – in this case – of labour policy is rudimentary. Additionally people working in the public sector are often scared to talk in a open way. |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | - |
| 4 | SOLUTION | Good partner selection and finding competent people in the respective institution (if possible) |
| 5 | PREVENTION | Better Partner selection |

| | INTERVIEW 3 | Problem 1 | Problem 2 |
|---|---------------|-----------------------|---------------|
| 1 | NATURE | Liquidity problems of | Communication |



| | | | |
|---|---|--------------------------------|----------------------------------|
| | | partner | among partners |
| 2 | CAUSE | Financial situation of partner | language skills |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | Planning and implementation | Planning and implementation |
| 4 | SOLUTION | guarantees | translation |
| 5 | PREVENTION | Good partner selection | Budget planning with translation |

| | INTERVIEW 4 | Problem 1 | Problem 2 | Problem 3 |
|---|---|---|--|--|
| 1 | NATURE | All partners – including the applicant – was not familiar with the proposal. | Liquidity problems of a core partner concerning to development of special software | Quality of a partner, the promised products couldn't be developed |
| 2 | CAUSE | Person who has written the proposal was gone. | Financial situation of partner | Partner was not aware of his tasks before signing the letter of intent |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | Imprecise planning | Imprecise planning | Imprecise planning |
| 4 | SOLUTION | Joint preparation of proposal, involvement of at least two persons who are writing the proposal | Better planning, partner selection | Better planning, partner selection |
| 5 | PREVENTION | Participation of partners – more than one person – in preparation of the proposal | Better planing | Better planing |

| | INTERVIEW 5 | Problem 1 | Problem 2 |
|---|--------------------|--|--|
| 1 | NATURE | Acquisition of participants for training activities. | Bad mood/climate among the participants of international project |





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| 2 | CAUSE | Motivation of target group (here trade union activists and work council members). | Cultural misunderstandings, Polish participants felt angry about some statements of German participants (religion) |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | Planning and implementation | Planning and implementation |
| 4 | SOLUTION | Realistic planning of number of participants, planning and implementation of motivation activities in the project (time and costs) | Preparation of "guideline" about cultural specifics and attitudes, seminar with participants about cultural specifics |
| 5 | PREVENTION | Realistic planning | Preparation of "culturalguideline" |

| | INTERVIEW 6 | Problem |
|---|---|--|
| 1 | NATURE | Problems with police and residents |
| 2 | CAUSE | behaviour of participants – young Germans in Holland (exchange of youth) |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | Planning and preparation of the project, Inadequate, bad preparation of participants, wrong expectations concerning to Holland (drugs, party...) |
| 4 | SOLUTION | - better quality of preparation of participants - educational programme for multipliers |
| 5 | PREVENTION | - development of intercultural competencies |

| | INTERVIEW 7 | Problem 1 | Problem 2 |
|---|--------------------|--|---|
| 1 | NATURE | Some partners could not give the expected expertise, had not the expected competences. | A lack of financial resources occurred during the organization of an international conference. Partner could give the committed amount of |

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| | | | financial support. |
| 2 | CAUSE | Project proposal was not clear. Roles and tasks of project partners set in the proposal were imprecise in some core fields. Project leader required thematic support some partners could not give. | The institutional capacities of a partner were too low. |
| 3 | IMPRECISE PLANNING/ PROJECT'S IMPLEMENTATION | Planning | Planning |
| 4 | SOLUTION | New definition of tasks and roles. Amendment to the EU. | Changing partner in a shortterm |
| 5 | PREVENTION | Clear proposal with realistic definitions of partner's tasks and roles. Partner selection! | To estimate the capacities of new partners is difficult. Good experiences with well known partners help. Buffer in financial planning. Planning of alternative scenarios. |