EMOTiC
European Multidisciplinary Organization for Training and international Consulting

ORGANISATIONAL SUPPORT

Project Management Handbook

How we plan, run, monitor and report European projects with our partners, step by step.

Version	Owner	Review
1.0 October 2026	Board	Every two years, or earlier when the Erasmus+ Programme Guide or grant agreement rules change

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At a glance

- Every project has one Project Coordinator and follows the same ten phases, from idea to archive.
- We agree roles, budget shares and duties in writing with every partner.
- We prepare each mobility on a 12-week timeline with clear travel rules, a risk assessment and consent forms.
- We keep supporting documents for every cost and report on time in the EU Beneficiary Module.
- We learn from every project and update our templates and this handbook.

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1. Purpose and who uses it

This handbook describes how EMOTiC plans, runs, monitors and reports European projects with partner organisations. It focuses on Erasmus+ youth exchanges and training courses (Key Action 1) and cooperation partnerships (Key Action 2), and also applies to CERV projects.

It is for everyone who works on our projects: Project Coordinators, the Financial Officer, trainers and facilitators, group leaders, volunteers and interns, and contact persons in partner organisations.

> The grant agreement and the Erasmus+ Programme Guide always take priority over this handbook.

2. The project life cycle

Every project moves through ten phases. Each phase's outputs must exist before the next phase starts.

Phase	Key tasks	Responsible	Outputs
1. Idea and needs analysis	Collect needs from local work, partners and earlier evaluations; check fit with the call	Project Coordinator, Board	Idea note, needs summary, decision to apply
2. Partner search and selection	Find partners with relevant experience and reach; check legal status, capacity and references	Project Coordinator	Partner list and profiles, mandates where required
3. Application writing	Draft with partners; plan programme, budget and dissemination; internal review; submit	Project Coordinator, Financial Officer, partner contact persons	Submitted application
4. Contracting with the National Agency	Check the grant decision; sign the grant agreement; set up the project in the Beneficiary Module	Board, Project Coordinator, Financial Officer	Signed grant agreement, project file
5. Partnership agreements	Agree tasks, budget shares and payment schedule; sign with each partner	Project Coordinator, Financial Officer, Board	Signed partnership agreements
6. Preparation	All steps in section 6	Project Coordinator, partner contact persons, group leaders	Participant list, info pack, risk assessment, consent forms
7. Implementation	Deliver the programme as set out in section 7	Trainers and facilitators, Project Coordinator, group leaders	Attendance lists, session notes, Youthpass certificates

Phase	Key tasks	Responsible	Outputs
8. Follow-up and dissemination	Run local follow-up actions; share and publish results	Partner contact persons, Project Coordinator	Follow-up and dissemination evidence
9. Reporting and closure	Reimburse travel; finalise the budget; submit the final report; pay final partner shares	Project Coordinator, Financial Officer	Final report, closed accounts
10. Archiving	Check and store the project file; set deletion dates for personal data	Project Coordinator, Data Protection Contact	Archived project file

3. Roles and responsibilities

Role	Main responsibilities
Project Coordinator	Appointed by the Board for each project. Leads planning, partner communication, quality and reporting. First contact for the National Agency.
Financial Officer	Plans and tracks the budget, makes payments, checks supporting documents and prepares financial reporting.
Trainers and facilitators	Design and run sessions, lead reflection groups and the Youthpass process, and contribute to evaluation.
Group leaders	Accompany their national group, support participants' wellbeing and learning, collect travel documents and pass on concerns.
Partner contact persons	One per partner. Recruit and prepare participants, meet agreed deadlines, and lead local follow-up and dissemination.
Board	Approves applications and agreements, signs through the persons authorised by our statutes, appoints Project Coordinators and the Safeguarding Focal Point, and reviews results every year.

The **Safeguarding Focal Point** advises on risk assessments and handles concerns about participants' safety or wellbeing. The **Data Protection Contact** advises on consent forms, participant data and retention periods.

4. Application writing checklist

Before submission, the Project Coordinator and a second reader check the application against this list.

- **Needs:** evidenced from our local work, our partners and earlier evaluations.
- **Objectives:** few and clear, each linked to a need and to programme priorities.

- **Participants with fewer opportunities:** who they are, which barriers they face and how partners reach them.
- **Inclusion:** support measures, inclusion support costs, an accessible venue and accessible materials.
- **Green and digital practices:** green travel, low-waste choices, safe and purposeful use of digital tools.
- **Learning outcomes:** what participants will be able to do afterwards, linked to the Youthpass key competences.
- **Programme:** a day-by-day plan with methods, daily reflection, participant-led sessions and free time.
- **Dissemination:** target groups, channels, timing and responsibilities.
- **Budget:** consistent with the activities, correct participant numbers and distance bands, justified real costs, no double funding.

We aim to submit at least one working day before the deadline.

5. Partnership agreements

We sign a written agreement with every partner organisation before preparation starts. It follows the grant agreement and covers:

- roles, tasks and the contact person of each partner;
- budget shares, what they cover and which costs EMOTiC pays directly;
- the payment schedule and the documents each payment depends on;
- participant selection: profile, numbers, age limits, inclusion, the group leader and parental consent for participants under 18;
- insurance: who arranges health, accident and liability cover for each participant;
- visibility: the EU emblem and disclaimer on all project materials;
- data protection: which personal data is shared, why, and how it is protected, in line with the GDPR;
- safeguarding: commitment to our Safeguarding Policy and Code of Conduct;
- deadlines for travel documents and for follow-up and dissemination evidence;
- withdrawal: notice period, return of unused funds, late cancellation costs, and the possible need for National Agency approval to replace a partner;
- how disputes are settled and which law applies.

6. Preparing a mobility

For youth exchanges and training courses we plan backwards from the day of arrival. In Vienna, participants usually stay at a youth guest house such as the Jugendgästehaus Wien Brigittenau.

Weeks before arrival	Task	Responsible
12 weeks	Confirm dates; book venue, accommodation and seminar rooms; open the project file	Project Coordinator
10 weeks	Publish the call for participants with profile, criteria and inclusion measures	Partner contact persons
8 weeks	Select participants and group leaders; report accessibility, dietary and support needs	Partner contact persons
7 weeks	Send travel rules and distance bands; approve proposed routes and prices	Project Coordinator
6 weeks	Send the info pack: programme, venue, travel, insurance, Code of Conduct, emergency contacts	Project Coordinator
4 weeks	Hold the online preparatory meeting; complete the risk assessment	Project Coordinator, Safeguarding Focal Point
3 weeks	Collect consent forms, including photo consent and parental consent for participants under 18	Partner contact persons, group leaders
2 weeks	Confirm accessibility arrangements, rooms and meals; prepare with the trainer team	Project Coordinator, trainers and facilitators
1 week	Send arrival instructions; finalise emergency contacts and attendance lists	Project Coordinator
Day of arrival	Welcome, check-in, safety briefing, house rules, collection of travel documents	Project Coordinator, group leaders

Travel booking rules

- The distance band, calculated with the European Commission's distance calculator from the place of origin to the venue, sets the maximum travel grant per participant.
- Participants book only after the Project Coordinator has approved the route and price in writing.
- We expect the cheapest reasonable option in economy class. Green travel by train, bus or shared car is encouraged and receives the green travel rate where eligible.
- Travel dates match the arrival and departure days, and participants keep every ticket, invoice and boarding pass.

Accessibility needs. We ask about support needs at registration, discuss them privately and arrange support before arrival, using inclusion support where the grant allows it.

7. During the activity

- **Daily team meetings:** the whole team reviews the day, participants' wellbeing, logistics and any concerns.
- **Reflection groups:** at the end of each day, small groups reflect on their learning with a facilitator.
- **Youthpass:** introduced on the first day, supported by learning diaries and completed with a self-assessment and certificate.
- **Attendance and signatures:** every participant signs the attendance list each day. Signed lists are key supporting documents.
- **Photos with consent:** we only photograph or film participants who have agreed, and consent can be withdrawn at any time.
- **Budget tracking:** expenses are recorded with receipts on the same day and checked against the budget daily.

Concerns about a participant's safety or wellbeing go straight to the Safeguarding Focal Point. In an emergency, call 112.

8. After the activity

1. **Travel reimbursement:** only against original tickets, invoices and boarding passes, up to the approved amount and within the agreed period.
2. **Participant reports:** we remind participants to complete the EU participant report sent from the Beneficiary Module, and follow the response rate.
3. **Follow-up actions:** each partner runs its planned local follow-up actions and sends us evidence.
4. **Dissemination:** partners share results through the channels in the dissemination plan.
5. **Evaluation report:** written within six weeks following our Quality and Evaluation Framework, and shared with partners.

9. Financial management for EU grants

We manage each type of EU funding according to its own rules.

Type	Used for	Main evidence
Unit costs	Key Action 1 travel, organisational support and individual support	Signed attendance lists, tickets and boarding passes
Lump sums	Key Action 2 cooperation partnerships and some other calls	Outputs and records of completed activities
Real costs	Inclusion support, exceptional costs such as expensive travel or visas, and calls funded on actual costs	Invoices, proof of payment, contracts

- Each project has its own cost centre, and every invoice carries the project reference.
- We keep supporting documents for unit costs and lump sums too, because the National Agency can check that activities took place.
- We convert other currencies into euro using the method set in the grant agreement and the Programme Guide, and record the rate and its source.
- **No double funding:** no cost is charged to two grants or funders. The Financial Officer checks this before each report.
- The Financial Officer reconciles spending with the budget every month and flags any risk of overspending early.

10. Reporting

For Erasmus+ projects managed by a National Agency, we report in the EU Beneficiary Module.

- We enter activities and participants as soon as they are confirmed.
- We submit interim or progress reports where required.
- Partners send their input for the final report by an internal deadline, well before the official one.
- The final report covers activities, participants, learning outcomes, follow-up, dissemination and budget. A second person checks it before submission.
- For CERV and other programmes, we use the reporting system of the granting authority.

11. Dissemination and visibility

- All project materials, posts, banners and presentations carry the EU emblem and the statement "Co-funded by the European Union".
- Where required, we add the standard disclaimer that the views expressed are the authors' own and not necessarily those of the European Union or the granting authority.
- We publish results on the Erasmus+ Project Results Platform, our website and partners' channels, and use the European Youth Portal where relevant.
- Each project has a dissemination plan with target groups, channels, timing and responsibilities.

12. Document management and archiving

Each project has one project file with a standard structure: application, contracts, participants, programme, finance, evaluation, dissemination and reports.

- We keep all records for the full period required by the grant agreement, and longer where Austrian law requires it.
- Signed originals are kept in a locked cabinet at our office, with scanned copies in the project file.
- Access to personal data is limited to those who need it, in line with the GDPR and the Austrian Data Protection Act (DSG).

- At closure, the Project Coordinator checks the file against the project file checklist and records when personal data can be deleted.

13. Lessons learned and continuous improvement

After each activity and project, the team holds a debrief and records findings in our lessons learned log: what worked, what to change, who owns the change and by when. Once a year, the Board reviews the log with the Project Coordinators and updates our templates and this handbook. Our Quality and Evaluation Framework explains how we collect and use feedback.

14. Templates

- Project idea note
- Partner profile form
- Application review checklist
- Partnership agreement
- Budget tracking sheet
- Call for participants
- Participant registration form
- Info pack
- Travel approval and reimbursement form
- Risk assessment form
- Consent forms for adults and for parents of participants under 18
- Daily attendance list
- Evaluation report
- Dissemination plan
- Lessons learned log
- Project file checklist

15. Review

The Board reviews this handbook every two years, or earlier when programme rules or our lessons learned call for changes.

This version was issued by the Board in October 2026.

This document is part of EMOTiC's organisational support materials. Other organisations are welcome to adapt it for their own work with credit to EMOTiC. Questions and feedback: emotic.org@gmail.com