Strengthening Erasmus+ Proposals with Results-Based Management (RBM)

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What do you think is the biggest challenge in writing Erasmus+ proposals?

What will we do in this session?

Developing skills to provide practical guidance on aligning project activities with defined objectives and measurable impacts

Focus on strengthening skills in applying for Erasmus+ proposal specifically on the Application steps, Work package, budget, milestones and deliverables

What Is Results-Based Management (RBM)?

- **Results Based Management** is a management strategy that ensures all processes, products, and services contribute directly to achieving desired results—namely **outputs**, **outcomes**, and **impact**.

- **Relevance for Erasmus+**

Fosters clarity in defining project objectives and expected changes.

Enhances accountability by linking resources and activities to measurable results.

Emphasizes measurable outcomes that align with Erasmus+ priorities for evidence-based impact.

Logical Framework Matrix

Project Elements	Indicators (How to Measure Success?)	Means of Verification	Assumptions & Risks
Overall Objective	The broader impact the project seeks to achieve at the policy/societal level.	How will success be measured at the macro level?	Reports, statistics, policy changes
Specific Objective(s)	The direct outcomes expected by the end of the project timeframe.	Measurable indicators (KPIs)	Surveys, evaluations, project reports
Outputs (Results)	The tangible deliverables of the project (e.g., training modules, digital tools, policy recommendations).	Number, quality, and usability of outputs	Project documents, user statistics, feedback surveys
Activities	Specific tasks and actions to achieve outputs.	Process indicators (e.g., number of events, participants, milestones reached)	Attendance lists, event reports, materials produced

For actions managed by the Executive Agency

- **legal representative must create a user account – EU Login account**

New EU Login accounts can be created here: https://webgate.ec.europa.eu/cas/

- **Access the EU Funding & Tenders Portal** at https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home and register on behalf of the organisation/group you represent.

For actions managed by the Erasmus+ National Agencies

- **For actions managed by the Erasmus+ National Agencies**

New EU Login accounts can be created here: https://webgate.ec.europa.eu/cas/

- **Access the Organisation Registration system for Erasmus+ and European Solidarity Corps** at https://webgate.ec.europa.eu/erasmus-esc and register on behalf of the organisation/group you represent.

PIC vs OID?

- **PIC** (Participant Identification Code):
Used for centralised actions managed by EACEA

Ex. Capacity Building in Higher Education (CBHE)

- **OID** (Organisation Identification Number):
Used for decentralised actions managed by National Agencies

Ex. International Credit Mobility (ICM)

Application Form

The Form consists of 2 parts:.

- Part A contains structured administrative information
- Part B is a narrative technical description of the project.

Part A is generated by the IT system. It is based on the information which you enter into the Portal Submission System screens.

Part B needs to be uploaded as PDF (+ annexes) in the Submission System.

Let´s discover the Application Form together

Key Action 1: Learning mobility of individuals

• Mobility projects for learners and staff in higher education, vocational education and training (VET), school education, adult education and youth

• Erasmus accreditations in the fields of higher education, VET, school education and adult education and in the field of youth

• Youth participation activities

• DiscoverEU Inclusion Action

• Mobility of staff in the field of sport

• **Virtual exchanges in higher education and youth.**

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Key Action 2: Cooperation amongst organisations and institutions

· **Partnerships for Cooperation**, comprising:
o Cooperation Partnerships o Small-scale Partnerships.

· **Partnerships for Excellence**, including:
o Centres of Vocational Excellence
o Erasmus+ Teacher Academies
o **Erasmus Mundus Action.**

· **Partnerships for Innovation**:
o Alliances for Innovation
· **Capacity Building in the fields of higher education**, **vocational education and training, youth** and sport
· Not-for-profit European sport events.

Key Action 3: Support to policy development and cooperation • European Youth Together

Jean Monnet Actions

- **Jean Monnet actions in the field of higher education**
- **Jean Monnet in other fields of education and training.**

The Importance of Doing a Needs Analysis

Needs analyses

- The **purpose of a needs assessment** is to **identify those areas/fields that need to be strengthened**, and the **reasons for the gaps** in those areas.

- That, in turn, **provides the basis for designing appropriate interventions to address the gaps** and, thereby, build the HEIs capacity.

Breakout Group Exercise 1: Do a Needs Analysis

Section	Guiding Questions / Instructions
1. Project Context and Scope	- **Brief Description:** Provide an overview of the proposed project (topic, thematic focus, and overall aim).- **Geographical/Institutional Scope:** Specify the region, country, or institutions involved.
2. Target Group(s)	- **Who Will Benefit?** Identify the main beneficiaries (students, teachers, institution, etc.).- **Key Characteristics:** Note relevant demographic or contextual details (country, backgrounds, etc.).
3. Identified Problems or Gaps	- **Problem Statement:** Articulate the main challenges the project addresses. - **Evidence of the Problem(s):** Reference any data, research, or examples illustrating these challenges .- **Root Causes:** List underlying factors contributing to the problem(s).
4. Data Collection Methods	- **Sources of Information:** Include surveys, interviews, focus groups, official statistics, etc. - **Key Findings/Insights:** Summarize major points from the data that highlight the issues' scope and nature.
5. Relevance to Erasmus+ Priorities	- **Connection to Erasmus+:** Demonstrate how the identified needs align with relevant Erasmus+ objectives (e.g., inclusion, digital transformation, sustainability).
6. Project Objectives (Linked to Needs)	- **Objective 1:** Explain how it addresses a specific need.- **Objective 2:** Explain how it addresses a specific need.- **Objective 3 (etc.):** Continue as needed.
7. Potential Solutions or Strategies	- **Proposed Activities/Approaches:** Brainstorm interventions (e.g., workshops, training modules, policy recommendations).- **Rationale:** Describe why these solutions are appropriate for the identified needs and target group.
8. Prioritization of Needs	- **High/Medium/Low Priority:** Assign priority levels to each identified need to focus on the most critical ones.
9. Expected Outcomes	- **Short-Term Changes:** Indicate immediate benefits or improvements.- **Long-Term Changes:** Specify longer-term impacts or shifts (e.g., policy change, improved practices).
10. Follow-Up and Sustainability	- **Ongoing Assessment:** Outline how progress will be tracked (evaluations, feedback sessions).- **Long-Term Impact:** Explain how results will be sustained beyond the project's completion.

Equipment

(CBHE)

Only the purchase of equipment which **is directly relevant to the objectives of the Strand and made not later than 12 months before the end of the project** can be considered as eligible expenditure.

WHAT ARE THE FUNDING RULES?

Check on the Action in the Erasmus+ programme guide

Example: CBHE follows a **lump-sum funding model**.

The amount of the single lump-sum contribution will be determined for each grant based on the estimated budget of the action proposed by the applicant.

[CBHE] The granting authority will fix the lump sum of each grant based on the proposal, evaluation result, the **funding rate of 90% and the maximum grant amount**.

How is the project lump sum determined?

Fill-in a detailed budget table in the application form, taking into account the following points:
• The budget should be detailed as necessary by beneficiaries and **organised in coherent work packages**
• The proposal **must describe the activities/deliverable** covered by each work package.
• Applicants must provide in their proposal a **breakdown of the estimated costs** showing the share per work package
• Costs described can cover **staff costs, travel and subsistence costs, equipment costs and subcontracting as well as other costs (such us dissemination of information, publishing or translation).**

How is the project lump sum determined? (CBHE)

- The costs for equipment should present **a maximum of 35% of the awarded EU grant and the EU grant will cover 100% of the eligible costs**.

- The subcontracting should represent a maximum of 10% of the awarded EU grant.

- Financial support to third parties is not allowed.

- Costs relating to volunteers involved in the project are allowed. They shall take the form of unit costs as defined in the to the Commission Decision on unit costs for volunteers

- SME unit costs are not allowed.

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Who Can Apply

Be careful to check the Programme Guide on who can apply, who can be coordinator as it varies per Action

Example:
Capacity building in Higher Education - Third Countries not Associated to the Programme can submit as Coordinator

Criteria in Evaluating Erasmus+ Proposals

Criterion	Max Score	What is Assessed
1. Relevance of the Project	30	- Alignment with Erasmus Mundus Objectives (academic excellence, innovation, internationalization)- Needs Analysis (evidence-based justification for the programme)- European and Global Added Value (how the programme addresses EU and wider societal priorities)
2. Quality of the Project Design & Implementation	30	- Curriculum & Academic Approach (coherence, learning outcomes, innovative teaching methods)- Programme Structure & Feasibility (logical sequence of modules, clear work plan)- Quality Assurance & Inclusivity (monitoring, evaluation, support services)
3. Quality of the Partnership & Cooperation Arrangements	20	- Expertise & Complementarity (each institution's added value to the consortium)- Roles & Responsibilities (clarity in coordination, management, decision-making)- Consortium Governance & Communication (effectiveness of joint structures and processes)
4. Impact	20	- Expected Results (short- and long-term benefits for students, staff, institutions)- Dissemination Strategy (plans to share results, best practices)- Sustainability (measures for continuing activities and outcomes beyond the funding period)

Check Erasmus+ Programme Guide. This one is specific to Erasmus Mundus

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Important !
Each criterion usually requires a minimum threshold
The exact points allocated to each criterion can vary by Action so checking the specific Action requirement is essential.

Make sure to study the Erasmus+ Programme Guide

WORK PACKAGES

Making sure the Project is results-based

What is a Work Package?

- Think of a work package like a mini project within your main project – it's a chunk of related tasks grouped together.
- Each work package helps move the overall project forward by focusing on a specific area or goal.
- Some are all about delivering results, while others focus more on making sure everything runs smoothly, like project management or implementation.
- When you put all the work packages together, they build up the whole project – kind of like assembling different pieces of a puzzle.
- It's also a helpful way to break down the big picture into clear, manageable steps so everyone knows what needs to get done and how.

Milestones vs. Deliverables

Contrary to **deliverables**, which must be linked to a specific WP (and, ideally, to a specific task),
milestones can be attributed to several WPs at the same time.

Project Title: DigiEd4All – Enhancing Digital Inclusion in Education

- **Work Package 1 (WP1): Project Management & Coordination**
  Deliverable (D1.1): Consortium Agreement Signed
  Task: Ensure all project partners sign the formal agreement defining responsibilities, timelines, and commitments.
  Work Package 2 (WP2): Development of Digital Inclusion Training Materials
  Deliverable (D2.1): Digital Literacy CurriculumTask: Develop an inclusive digital literacy curriculum adapted to diverse learner needs.
  Work Package 3 (WP3): Pilot Testing in Schools
  Deliverable (D3.1): Implementation Report on School Pilot Programs
  Task: Conduct pilot tests in selected schools and gather feedback for curriculum improvement.

Milestone Example: Completion of Digital Inclusion Training & Readiness for Pilot Phase (M1)

WPs Linked:

- **WP2 (Training Material Development):** Ensures that the digital literacy curriculum is complete and ready to be implemented.

- **WP3 (Pilot Testing):** Ensures that trained educators are prepared and that all logistical arrangements for the school pilot phase are in place.

The evaluation procedure

- Project proposals are evaluated by the National or Executive Agency receiving the application, exclusively on the basis of the criteria described in the Guide. The evaluation implies:
  - a check to verify that the application meets the admissibility criteria
  - a check to verify that the applicant and the proposed activities meet the eligibility criteria,
  - a check to verify that the applicant meets the exclusion and selection (i.e. operational and financial capacity) criteria;
  - a quality assessment to evaluate the extent to which the application meets the award criteria.
  - a verification that the proposal does not present risks of double funding. If necessary, such verification is carried out in cooperation with other Agencies or other stakeholders.

Key elements of a work package

- **Work package objectives**

- Each work package aims to achieve one or more of the project objectives.

- description of the work package should start with the statement of those project objective(s) which the work package aims to achieve.

- the work package objectives define the methods, actions, and evaluation of the work package outputs and outcomes.

Key elements of a work package

- **Timetable with milestones**

- Realistic timetable

- months may be used as the unit for the timing of the activities (e.g. Gantt chart)

- earliest start date and latest completion date of the work package, define clear milestones.

- indicators are measures (both qualitative and quantitative) that allow you to track progress towards achieving the changes you wish to achieve.

Key elements of a work package

Describing your activities? Here's what to keep in mind:

- Make sure it's clear how your activities connect with your work package's goals – what you're doing, how you're doing it, and what results you're aiming for (both the outputs and the outcomes).

- Don't forget the bigger picture! Show how your work ties into the overall project's objectives, methods, and expected results.

- Basically, help the reader see the full story – how each step fits into both your work package and the whole project journey.

Key elements of a work package

- **Results (outputs and outcomes)**

- **outputs** - the products or services resulting from the activities and linked to the objectives.

- **Outcomes** are the measurable or observable changes in knowledge, behavior, or conditions that occur as a result of using the project's outputs.

- **Outcomes** reflect the broader effect these outputs have on participants, stakeholders, or systems (e.g., improved skills, increased employment opportunities, changes in institutional practices).

- **A deliverable** is a physical output related to a specific objective of the project, e.g. a report, publication, newsletter, tool, website, or conference.

Roles and responsibilities

- Although different organisations can contribute to a work package, it is important that one organisation is in charge (WP Leader).

- The work package plan should make clear which organisation./partner is responsible for the work package.

Relationship to other work packages

How do your work packages connect? Let's make it clear:

- Show how your work builds on what's already been done in other work packages – what are you picking up from them, and how will your results be useful for the next steps?

- It's all about teamwork – make it easy to see how the different parts of the project feed into each other.

- A great way to make these connections super clear? A Gantt chart. It visually maps out how everything fits together and when things are happening.

Make a Work Package

Work Package 1: [Name, e.g. Project management and coordination]

Duration:	MX – MX	Lead Beneficiary:	1-Short name

Objectives

-

Activities and division of work (WP description)

Task No (continuous numbering linked to WP)	Task Name	Description	Participants		In-kind Contributions and Subcontracting (Yes/No and which)
			Name	Role (COO, BEN, AE, AP, OTHER)	
T1.1					
T1.2					

Milestones and deliverables (outputs/outcomes)

Milestone No (continuous numbering not linked to WP)	Milestone Name	Work Package No	Lead Beneficiary	Description		Due Date (month number)	Means of Verification
MS1		1					
MS2		1					

Deliverable No (continuous numbering	Deliverable Name	Work Package No	Lead Beneficiary	Type	Dissemination Level	Due Date (month number)	Description (including format and

(linked to WP)							(language)
D1.1		1		*[R — Document, report] [DEM — Demonstrator, pilot, prototype] [DEC — Websites, patent filings, videos, etc] [DATA — data sets, microdata, etc] [DMP — Data Management Plan] [ETHICS] [SECURITY] [OTHER]*	*[PU — Public] [SEN — Sensitive] [R-UE/EU-R — EU Classified] [C-UE/EU-C — EU Classified] [S-UE/EU-S — EU Classified]*		
D1.2		1		*[R — Document, report] [DEM — Demonstrator, pilot, prototype] [DEC — Websites, patent filings, videos, etc] [DATA — data sets, microdata, etc] [DMP — Data Management Plan] [ETHICS] [SECURITY] [OTHER]*	*[PU — Public] [SEN — Sensitive] [R-UE/EU-R — EU Classified] [C-UE/EU-C — EU Classified] [S-UE/EU-S — EU Classified]*		

Estimated budget — Resources *(n/a for prefixed Lump Sum Grants)*

Participant	Costs													
	A. Personnel		B. Subcontracting	C.1a Travel			C.1b Accomodation	C.1c Subsistence	C.2 Equipment	C.3 Other goods, works and services	D.1 Financial support to third parties		E. Indirect costs	Total costs
[name]	X person months	X EUR	X EUR	X travels	X persons travelling	X EUR	X EUR	X EUR	X EUR	X EUR	X grants	X EUR	X EUR	X EUR
[name]	X person months	X EUR	X EUR	X travels	X persons travelling	X EUR	X EUR	X EUR	X EUR	X EUR	X prizes	X EUR	X EUR	X EUR
Total	X person months	X EUR	X EUR	X travels	X persons travelling	X EUR	X EUR	X EUR	X EUR	X EUR	X grants X prizes	X EUR	X EUR	X EUR]

For certain Lump Sum Grants, see detailed budget table/calculator (annex 1 to Part B; *see Portal Reference Documents*).

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Staff effort per work package

Fill in the summary on work package information and effort per work package.

Work Package No	Work Package Title	Lead Participant No	Lead Participant Short Name	Start Month	End Month	Person-Months
1						
2						
3						
4						
					Total Person-Months	

Staff effort per participant

Fill in the effort per work package and Beneficiary/Affiliated Entity.
Please indicate the number of person/months over the whole duration of the planned work.
*Identify the work-package leader for each work package by showing the relevant person/month figure in **bold***

Reminders, Notes and Tips

Planning your work packages? Here are some things to keep in mind:

- Your work packages should flow naturally from your project's overall objectives – start with the big goals, and break them down into focused chunks of work.

- Try to show how each work package (or group of them) connects to a specific project objective. It helps tell the story of *why* each piece matters.

- Highlight how the different partners will collaborate – that teamwork is a big plus and adds real value to your project.

- Link the work-plan to each partner's strengths and expertise. Show who's doing what, and why they're the right fit for it.

- Remember: the work you describe in the work packages is what backs up your budget request. Make it clear that the resources you're asking for are tied directly to the work being done.

- Be clear about what each work package will deliver – define your outputs and outcomes so it's easy to see what success looks like.

- Make sure the results of one work package can actually feed into or support the next ones – think of the flow from one to the next like stepping stones toward your big-picture goals.

Thank you! Good luck in your proposals!