TOOLKIT NATIONAL CASCADE TRAINING

INTERNATIONALIZATION

FOR HIGHER EDUCATION

IN MYANMAR

16th DECEMBER 2021

TOOLKIT - DESIGNING AND MANAGING INTERNATIONAL RELATIONS, EDUCATIONAL PROJECT AND MOBILITY SCHEMES IN ASIAN UNIVERSITIES

YEZIN AGRICULTURAL UNIVERSITY

Effective Project Writing and Management

Dr. Hnin Yu Lwin & Dr. Nang Kyu Kyu Win

Yezin Agricultural University

16th December, 2021

Content

- Role of external funding/ project opportunities for universities

- Main actors and donors

- Decision to do project

- Project proposal (LFM)

- Best practices in project management

TOOLKIT - DESIGNING AND MANAGING
INTERNATIONAL RELATIONS, EDUCATIONAL PROJECT
AND MOBILITY SCHEMES IN ASIAN UNIVERSITIES

YEZIN AGRICULTURAL UNIVERSITY

Why competitive external funding or project opportunities may be relevant for universities?

Co-funded by the
Erasmus+ Programme
of the European Union

Global trends in Higher education systems

Toolkit

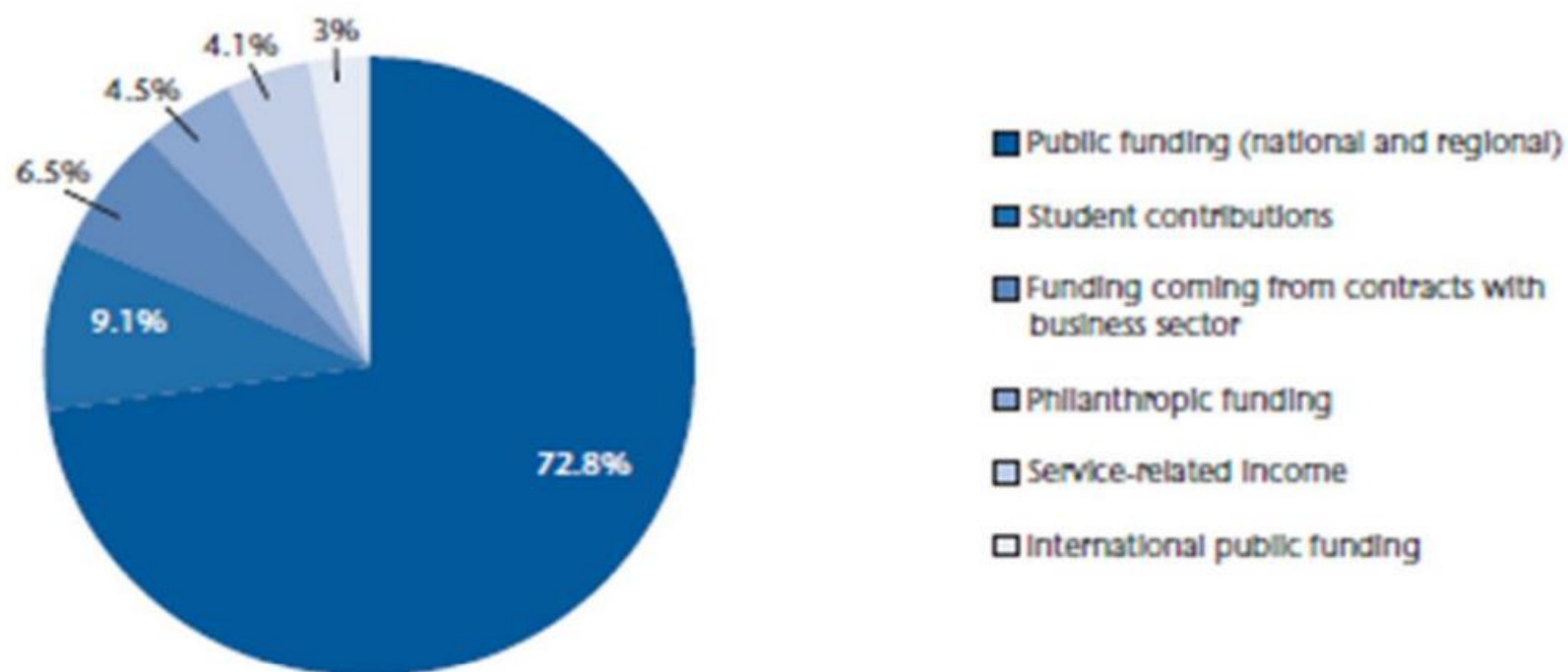|			
1 Facing COVID 19	2 Regional vs global internationalisation models	3 Modernisation of curricula and job creation	4 Accountability to the stakeholders: which contribution to society needs?
5 Strategic planning and development	6 Autonomy vs state control	7 Virtual Vs FtF teaching	8 Fullfillment of SDG goals at institutional level
9 Digitalisation	10 National and international ranking and reputation	11 Involvement of students in university decision making processes	

Revenue distribution in Eu universities

Graph 1 – Average income distribution

Pie chart values:
- 72.8%
- 9.1%
- 6.5%
- 4.5%
- 4.1%
- 3%

Legend:
- Public funding (national and regional)
- Student contributions
- Funding coming from contracts with business sector
- Philanthropic funding
- Service-related income
- International public funding

Revenue distribution in US public universities

Federal and State Funding Makes Up a Significant Share of Public College and University Budgets

Composition of public higher education institutional revenue, fiscal year 2013

37%
Federal and state revenue

21% State revenue

16% Federal revenue

21% Net tuition and fees

21% Self-supporting operations

8% Private gifts, investment revenue, and endowment income
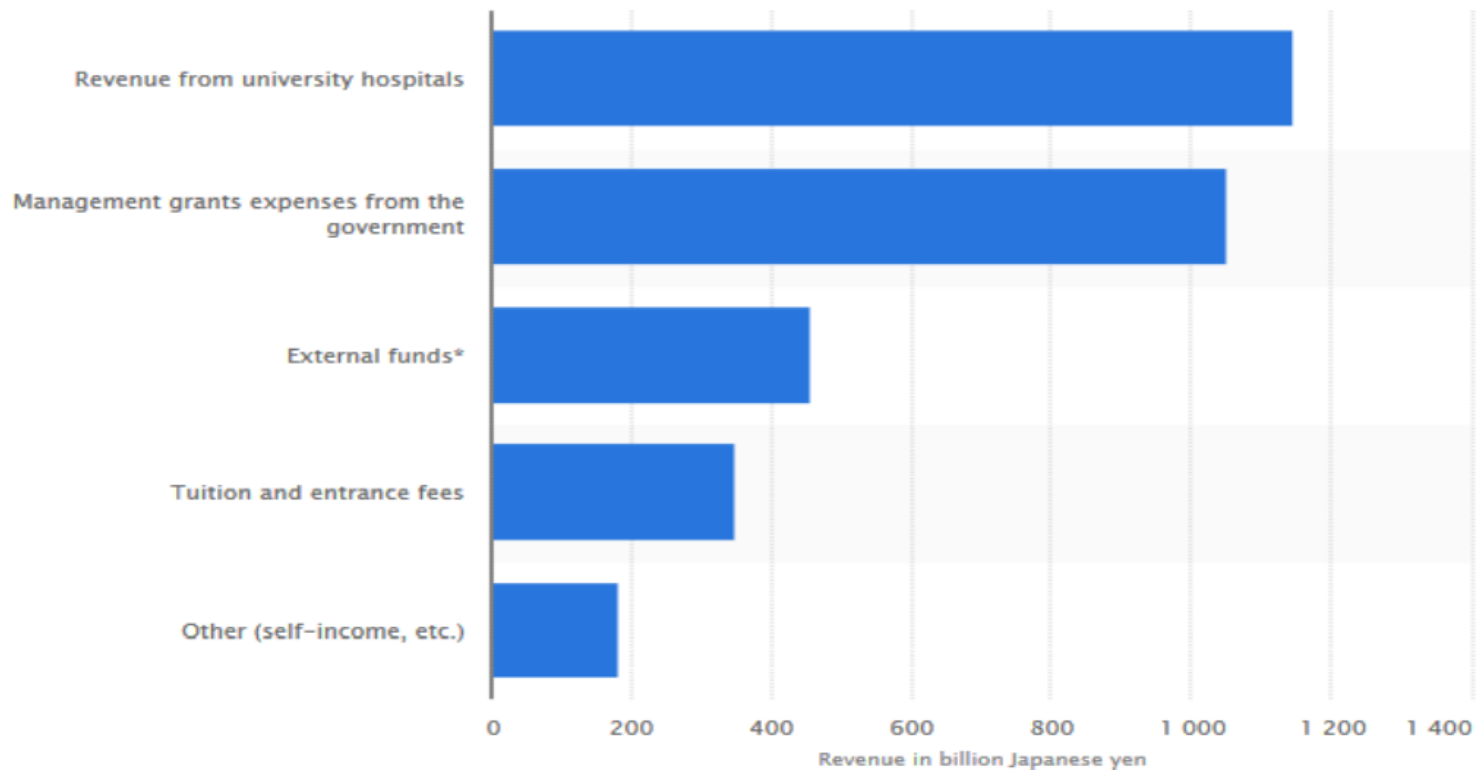
8% All other

4% Local revenue

Co-funded by the

Revenue of national university corporations in Japan in fiscal year 2018

Revenue from university hospitals

Management grants expenses from the government

External funds*

Tuition and entrance fees

Other (self-income, etc.)

0   200   400   600   800   1 000   1 200   1 400

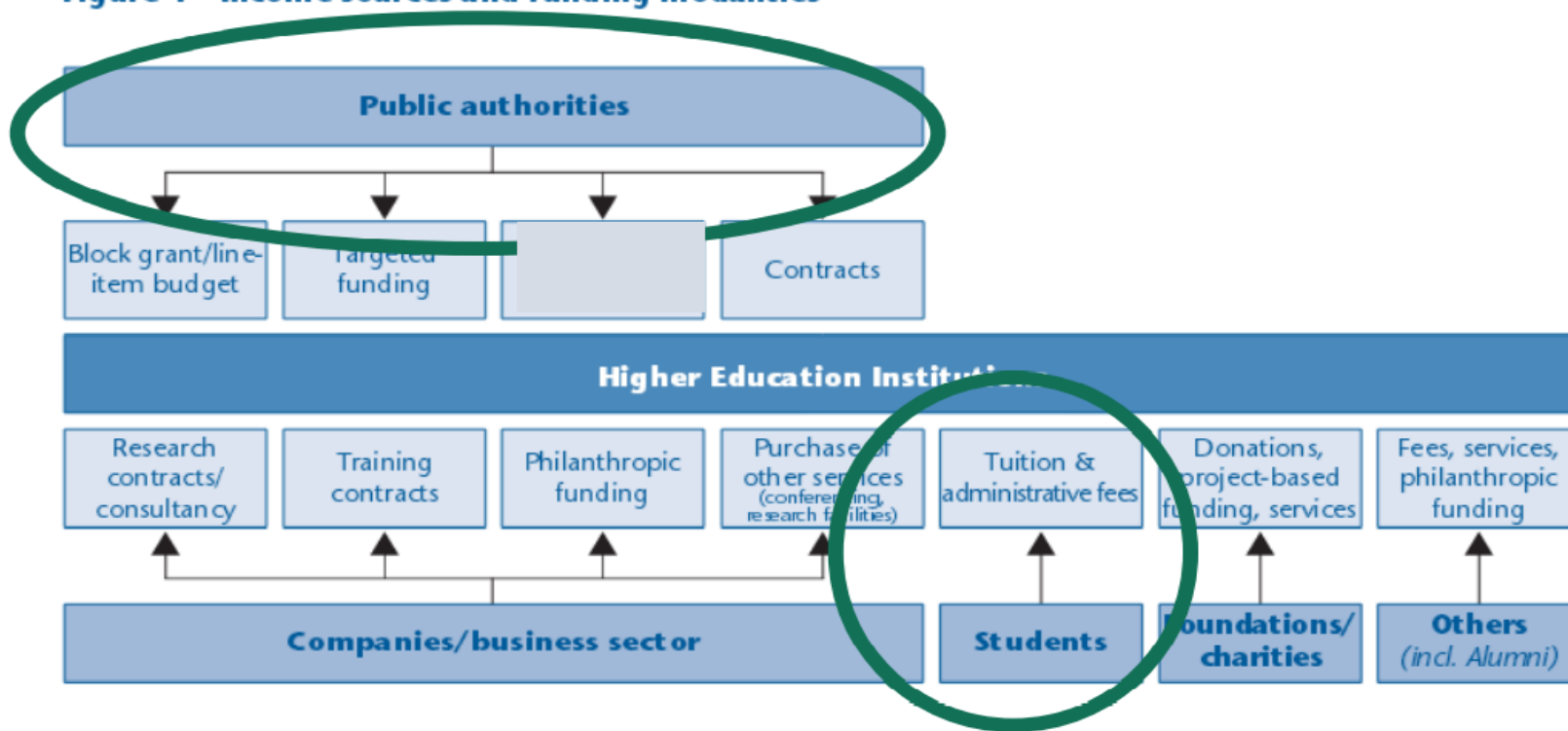Revenue in billion Japanese yen

© Statista 2021

ℹ Additional Information

Show source ℹ

Co-funded by the
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of the European Union

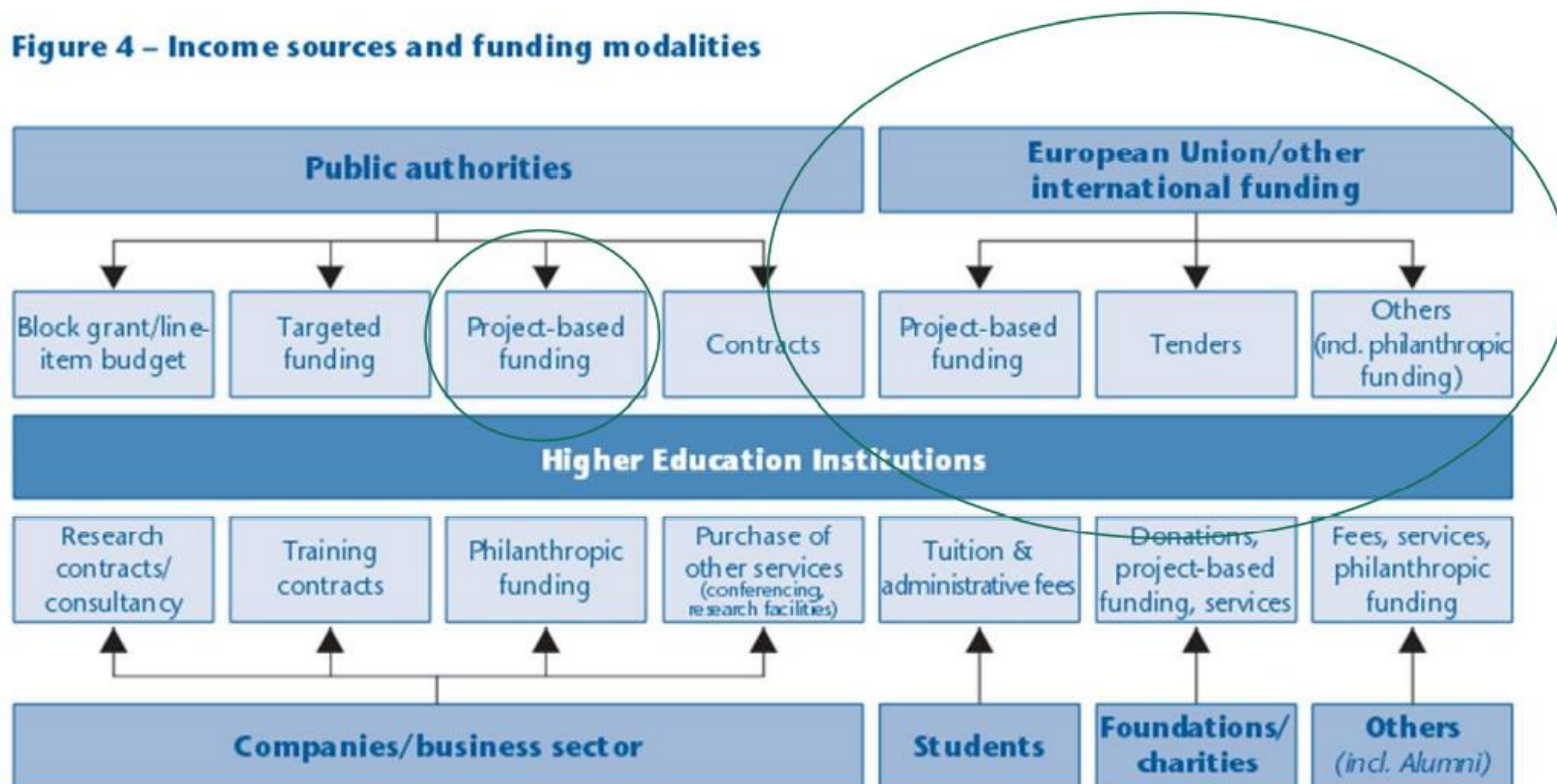## Figure 4 – Income sources and funding modalities

to summarise......

Figure 4 – Income sources and funding modalities

International funding agencies/institutions : who they are?

European union | International organisations | Bilateral cooperation agencies | Private fundations | Others??

Types of project actions

Projects to implement mobilities (institution based or individual opportunities)

Projects to implement Joint research projects

Projects to support the reform of services, governance, management of the university

Projects to reform and internationalise curricula

Projects to carry out feasibility studies on specific issues

Projects to contribute and provide solutions to societal needs, territorial policies

Projects to organise events, conferences or advocacy and comunication campaign

Projects to strengthen relation between university and society (including knowledge transfer, incubators etc)

Projects to organize short training for specific categories (like professionals, farmers, public servants, etc...) or or for the own staff or students

Types of eligible expenses

Staff cost

Travel costs and costs of stay

Scholarships/fellowship

Equipment

Consumable goods and office supplies

Provision of external services (like translation, web and communication design, room rental, printing, event management, etc...)

Databases/books/subscriptions to periodicals

Constructions

Furniture

Overheads (%)

Main actors and donors to support university initiatives in Toolkit partner countries

Applying for projects: the role of the IRO

- **Knowledge management**: knowing what schemes and programmes are available, who provides them, how to access detailed information and how to apply.
    - Get on mailing/news lists
    - Download publications
    - Pick up on faculty contacts

- **Contact management**: local offices (embassies etc) and international partners.
    - Invite staff from the donor to your university
    - Attend events
    - Meet international visitors

- **Knowledge dissemination**: communication with faculty and students about opportunities.
    - Website, social media
    - IRO as information centre
    - Briefings, information sessions

Types of development partners

Each development partner has its own objectives, its own methods of application, and its own ways of delivering projects.

This session aims to give you a basic overview, to which you can add your own experience, and use for further research.

- Multi-lateral working through governments (World Bank, ADB, UN agencies)
- Regional: SEAMEO, AUN, La Francophonie, Association of Commonwealth Universities, Erasmus+
- Bi-lateral: Fulbright, JICA, KFAS, Australian Development Program, DAAD, UK-British Council, Chinese Embassy
- Individual universities: Thailand, Singapore, Taiwan
- International NGOs, Trusts and Foundations

Call for scholarships/fellowships

They can cover different mobility experiences

Student exchange (all levels)	Student enrollment (master/phD)	Post doctoral fellowship

Interships	Short term visiting researchers mobilities	Participation to conference

Application form must be usually filled by single individuals

Some schemes requires an agrement with the home university

Popular among bilateral cooperation agencies

Main documents of a call

Documents concerning a call for proposals

- Work Programme/ Guide for Applicants
- Application forms and annexes:
  - Concept note/ full project description, budget, logical framework matrix (may be filled through online platforms)
- Model grant agreement
- Other documents

Guide for applicants

Guide for applicants/guidelines/call instructions

- Background/ Policy context
- Objectives of the programme
- Topics/challenges/priority issues under the call for proposal and expected results
- Overall financial allocation for the call and size of the grants (% of cofinancing)
- Eligibility of applicants
- Partnership and eligibility of partners
- Eligible actions and eligible costs

- Instructions for completing the application form and administrative annexes
- Instructions for submission of proposals and procedures to follow
- Instructions to fill the budget tables
- Deadline and information sources
- Check list
- Evaluation criteria and selection of applications

Decision time: Should we do this project?

Decision-making process

HAVE THE INFORMATION AND DATA AND COURAGE TO SAY NO!

1. Proposals, calls, invitations from partners to join a project.

2. Who decides?

➢ Vice-chancellor / Rector / President
➢ Head of Department
➢ Senate / Academic Board / International Committee

3. Good practice: have an agreed decision-making process. Deciding whether it is right to pursue the project.

4. Assessment for the decision:

➢ IRO
➢ Department
➢ Finance Office

Starting point

1. **Strategic fit**

   ➤ How will this project contribute to your University's strategy?

   ➤ National development goals / Sustainable Development goals?

   ➤ Is the project focussed on improving:

   (a) Teaching
   (b) Research
   (c) Administration
   (d) Community engagement
   (e) Some other area or a combination of several areas

2. **Benefits**

➤ What will be the benefits to your University? Try to quantify as far as possible.
- (a) Academic
- (b) Financial
- (c) Reputational

➤ What will be the benefits to your partner? If you know what your partner wants from the project, it will help you to define your own objectives and ensure that you are both working to a common purpose.

➤ What will be different at your University when the project is complete? This question tries to look further ahead and create a vision for what is possible.

Costs for your university

3. **Costs**

➤ How much staff time will be required from your University? Quantify in estimated person days.

    (a) Leadership time (how many meetings must the Rector attend?)
    (b) Faculty (Professor / Head of Department, Associate Professor, Lecturer etc.)
    (c) Academic support staff (Laboratory technicians, Library staff, IT staff etc.)
    (d) Administrative support (Finance, IRO, others?)

    How much of the cost of this staff time be covered by the project budget?

➤ What is the financial commitment required of your University?
Contributions in kind (meeting rooms, laboratory, equipment usage etc).

Governance, risks, evaluation

4. **Governance**:

➢ How is the project managed
➢ Who is responsible for what?
➢ Who is the Project Leader / Principal Investigator?
➢ How are disputes between partners resolved?
➢ Do you feel you have sufficient control?

5. **Risks**

➢ What are the risks associated with the project – finance, people, ethical issues, intellectual property and reputation.
➢ Are the risks acceptable?

6. **Evaluation**

➢ How will the project be evaluated, and by whom?

Reputation and Communications

7. Reputation

➢ What do you know about the partners?
➢ Are they a good fit for your university?
➢ Will they impose obligations on your university?

8. Communications

➢ What is the communications plan for the project?
➢ How will you inform faculty and students about the project (internal communications)
➢ How will you and / or the partner(s) publicise the project externally – in your country and their country?

Asking questions and making suggestions

9. Questions

➢ As you are completing this assessment, you may find there are questions you cannot answer.

➢ Go back to the donor / partner and ask. All invitations for proposals and from partners will have a system for asking questions. Don't be afraid to ask! It shows that you are really interested in the project and want to gain a deeper understanding.

10. Co-design and making suggestions

➢ You may find that you are happy with parts of the concept note, but other parts do not conform to your needs and objectives. You should make suggestions to make sure the project meets your needs.

From project proposals monitoring, analysis and evaluation to project writing

March 17th, Bologna

Good project ideas

external · Internal

Be familiar with th external context and opportunitie

Know your own needs but also your potential

Merging

How do I build a partnership

Rules about the partnerneships vary according to the call for proposals

Genenally speaking we usually need:
➢ Local partners (can be from the same country or the same region)
➢ International partners (can be from the country of the donor institution or from a wider cooperation schemes)

Genenally speaking we usually need:
➢ Other universities
➢ Othet types of institutions (NGPs, local authorities, foundations, companies, gvt.....)

How do I build a partnership

Possible criteria to identify other universities or institutions in your <u>country or region</u>

- need, relevance, priorities
- motivation
- Expertise in the field/topic/sector
- experience in project management
- trust

Channels
- Local contacts
- Formal contacts through the ministry
- Previous positive joint experience

How do I build a partnership

Possible criteria to identify <u>international partners</u>

➤ Interest in the country/region/institution (perceived value added)

➤ motivation

➤ Specific know how and complementarity

➤ experience in the region

➤ Trust

➤ Capacity to adapt and listen

Channels

➤ Networking (diaspora, former Master and PhD students, visiting professors)

➤ Common research interest

➤ University agreements

➤ Previous projects

Project draft proposal

Toolkit

It may be called also concept note, project resume/summary, project short description

Template

Proposed Title:.......................

Duration: ....

Target countries .... (Where?)

Tentative Partners: .... (Who?)

Short need analysis: .... (Why?)

Objectives: .... (To reach/obtain what?)

Main work packages, activities and outcomes........... (how?)

What we are expecting by your institution:.................

Tentative budget..................................

Projet proposal writing
Project planning tool: the Logical Framework Matrix

March 24th, Bologna

Project proposal writing: one project, many parts
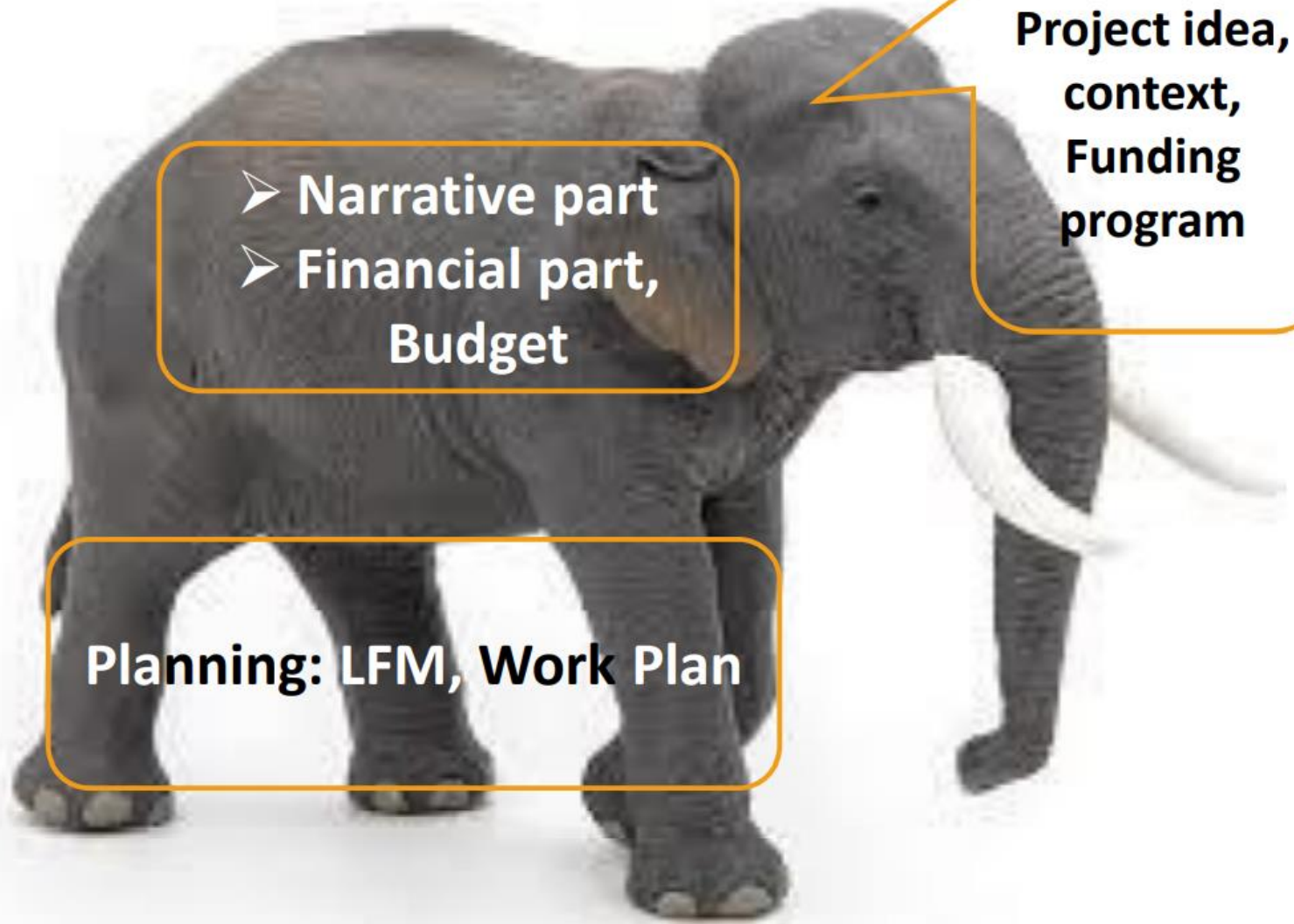
Project idea, context, Funding program

> **Narrative part**
> **Financial part, Budget**

Planning: LFM, Work Plan

The LFM: Logical Framework Matrix

➤ Tool for analysis and **planning**

➤ **clear and concise visual presentation** of all the **key components of a plan**

➤ **Basis for monitoring:**
- How the project will work
- What it is going to achieve and how
- What factors relate to its success and how they are connected
- How the progress will be measured

LFM: how to start

LOGICAL FRAMEWORK MATRIX – LFM

Wider Objective: *What is the overall broader objective, to which the project will contribute?*	**Indicators of progress:** *What are the key indicators related to the wider objective?*	**How indicators will be measured:** *What are the sources of information on these indicators?*	
Specific Project Objective/s: *What are the specific objectives, which the project shall achieve?*	**Indicators of progress:** *What are the quantitative and qualitative indicators showing whether and to what extent the project's specific objectives are achieved?*	**How indicators will be measured:** *What are the sources of information that exist and can be collected? What are the methods required to get this information?*	**Assumptions & risks:** *What are the factors and conditions not under the direct control of the project, which are necessary to achieve these objectives? What risks have to be considered?*
Outputs (tangible) and Outcomes (intangible): • *Please provide the list of concrete DELIVERABLES - outputs/outcomes (grouped in Workpackages), leading to the specific objective/s.:*	**Indicators of progress:** *What are the indicators to measure whether and to what extent the project achieves the envisaged results and outcomes?*	**How indicators will be measured:** *What are the sources of information on these indicators?*	**Assumptions & risks:** *What external factors and conditions must be realised to obtain the expected outcomes and results on schedule?*
Activities: *What are the key activities to be carried out (grouped in Workpackages) and in what sequence in order to produce the expected results?*	*What inputs are required to implement these activities, e.g. staff time, equipment, mobilities, publications etc.?*		**Assumptions, risks and pre-conditions:** *What pre-conditions are required before the project starts? What conditions outside the project's direct control have to be present for the implementation of the planned activities?*

LFM: wider objective VS specific objective

WIDER/OVERALL OBJECTIVE: medium/long-term aim that the project **contributes to.**

➢ It will not be achieved by the project alone

➢ It explains why the project is important in terms of long-term benefits

➢ It shows how the project fits into the regional or sectoral strategies/policies of the donor/promoter

SPECIFIC OBJECTIVE: what is expected to be **achieved by the end of the project.**

➢ the purpose that the intervention/project should be able to achieve

➢ the positive solution to the identified problems

➢ the reason why the project is implemented

➢ *SMART: Specific, Measurable, Accurate, Realistic and Time-bound*

From theory to practice: TOOLKIT LFM

enhancement and modernization of the internationalization strategies pursued by Asian universities

tailoring of innovative, transparent, and inclusive internationalization strategies by Asian universities

consolidation of a diffuse and long-lasting engagement towards HE internationalization strategies in the three countries involved

establishment of a network of European and Asian universities, supporting the effective integration of the higher education systems of Myanmar, Laos, and Sri Lanka within a regional and global framework

LFM: Deliverables – outcomes and outputs

TANGIBLE (output)

- Publications, articles, reports
- Training materials
- Conference materials
- Handbooks, guides, plans
- Networks
- Promo campaign
- Recommendation reports
- Analyses

INTANGIBLE (outcomes)

- Skills
- Knowledge
- Capacities
- Improvement in policies working methods
- Strategic thinking
- Institutional change
- Awareness
- Visibility

LFM: Deliverables vs Activities

ACTIVITY

Organisation of first project meeting

Development of a training course on security procedures in scientific laboratories

Update of teaching materials for a module of a Master programme in Animal Health

DELIVERABLE

Project Communication and Promotion Plan approved by the consortium

15 laboratory technicians have acquired new competences

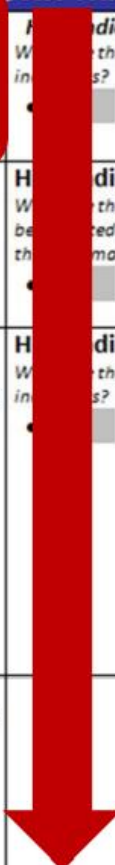Updated/New *syllabus* is approved and *published/ uploaded* on-line

LFM: useful terms

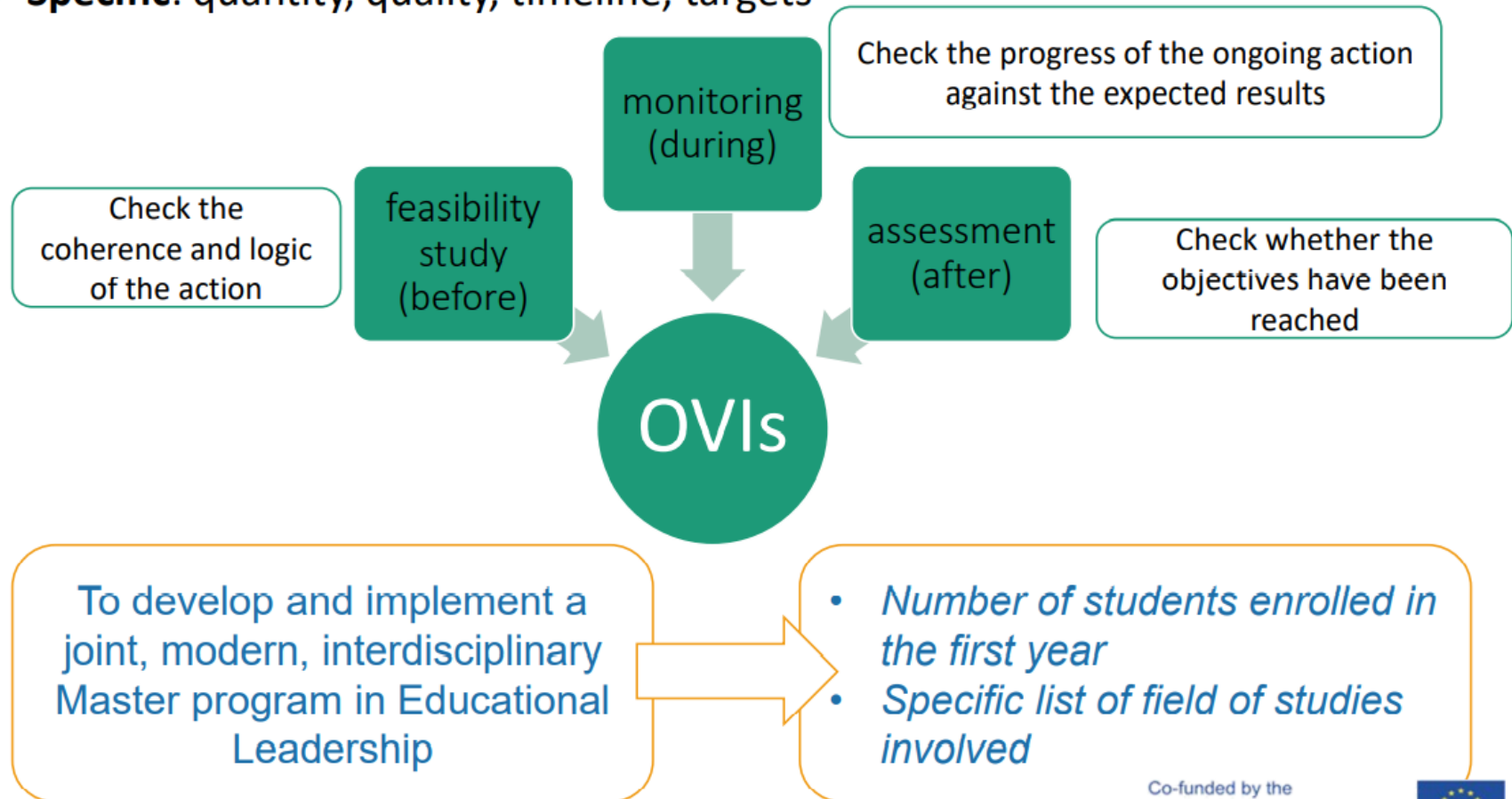|	has/have to be expressed in terms of
Wider objective	in terms of "to contribute to..."
Specifc objectives	in terms of benefit to the target group being "increased/ improved"
Deliverables	in terms of a tangible on intangible results "delivered/produced/conducted"
Activities	in the present tense starting with an active verb such as "prepare, design, develop, research"

Toolkit

LFM: indicators of progress

LOGICAL FRAMEWORK MATRIX – LFM

	Indicators of progress:	How indicators will be measured:	
Wider Objective: *What is the overall broader objective, to which the project will contribute?* •	*What are the key indicators related to the wider objective?* •	*What are the sources of information on these indicators?* •	
Specific Project Objective/s: *What are the specific objectives, which the project shall achieve?* •	**Indicators of progress:** *What are the quantitative and qualitative indicators showing whether and to what extent the project's specific objectives are achieved?* •	**How indicators will be measured:** *What are the sources of information that exist and can be collected? What are the methods required to get this information?* •	**Assumptions & risks:** *What are the factors and conditions not under the direct control of the project, which are necessary to achieve these objectives? What risks have to be considered?* •
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LFM: indicators of progress

Toolkit

➤ **Objectively verifiable indicators (OVIs)**: describe the project objectives in measurable terms

➤ **Specific**: quantity, quality, timeline, targets

monitoring (during)

Check the progress of the ongoing action against the expected results

Check the coherence and logic of the action

feasibility study (before)

assessment (after)

Check whether the objectives have been reached

OVIs

To develop and implement a joint, modern, interdisciplinary Master program in Educational Leadership

- *Number of students enrolled in the first year*
- *Specific list of field of studies involved*

LFM: indicators of progress

Level 1

- **Wider Objective**
- *What are the key indicators related to the wider objective?*

Level 2

- **Specific Objectives**
- *What are the quantitative and qualitative indicators showing whether and to what extent the project's specific objectives are achieved?*
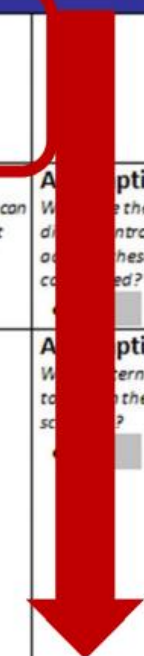
Level 3

- **Outcomes and outputs**
- *What are the indicators to measure whether and to what extent the project achieves the envisaged results and effects?*

LFM: indicators of progress

LOGICAL FRAMEWORK MATRIX – LFM

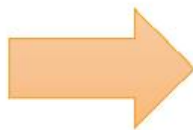|			
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LFM: measurement of indicators

➤ Which sources, where and how to find info, facts & figures necessary to verify –through OVIs- whether the project objectives have been reached / project outcomes have been met

➤ **Sources**:

   ✓ **Internal** to the project (es. narrative/financial reports and documents, questionnaires, surveys)

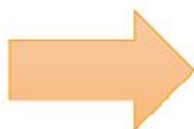   ✓ **External** to the project (publications, papers, manuals, on-line platforms, feedbacks from stakeholders)

QUANTITATIVE INDICATOR: Number of students enrolled in the first year → SOURCE: Student **register** at the university

External sources:
- ✓ accessibility
- ✓ accountability
- ✓ relevance
- ✓ 0-limited costs

QUALITATIVE INDICATOR: Usefulness of the training Programme → SOURCE: Participants' final **questionnaires**

LFM: measurement of the indicators of progress

Level 1

- **Wider Objective**
- *What are the key indicators related to the wider objective?*

Level 2

- **Specific Objectives**
- *What are the quantitative and qualitative indicators showing whether and to what extent the project's specific objectives are achieved?*

Level 3

- **Outcomes and outputs**
- *What are the indicators to measure whether and to what extent the project achieves the envisaged results and effects?*

For each level:

What sources of information?

How to collect the facts & figures?

From theory to practice: TOOLKIT LFM

Level 1

- **Wider Objective**
- enhancement and modernization of the internationalization strategies pursued by Asian universities, especially in terms of the capabilities displayed by local governance and IRO staff in drafting efficient and sustainable strategies, in designing and supervising innovative education projects, and in managing growing networks of mobility flows within their respective regions and beyond.

Asian HEIs enter/gain better placement in international and regional education rankings;

Education Index and Rankings

Level 2

- **Specific Objectives**
- the tailoring of innovative, transparent, and inclusive internationalization strategies by Asian universities, characterized by a strong emphasis on students and faculty members as the real protagonists and catalysts behind an effective modernization of local HES

Universities have implemented new policies and strategies for international relations

Universities regulations and policies; Universities websites and regulations;

Level 3

- **Outcomes and outputs**
- University governance engagement

Meetings with University governance and National governance are organized
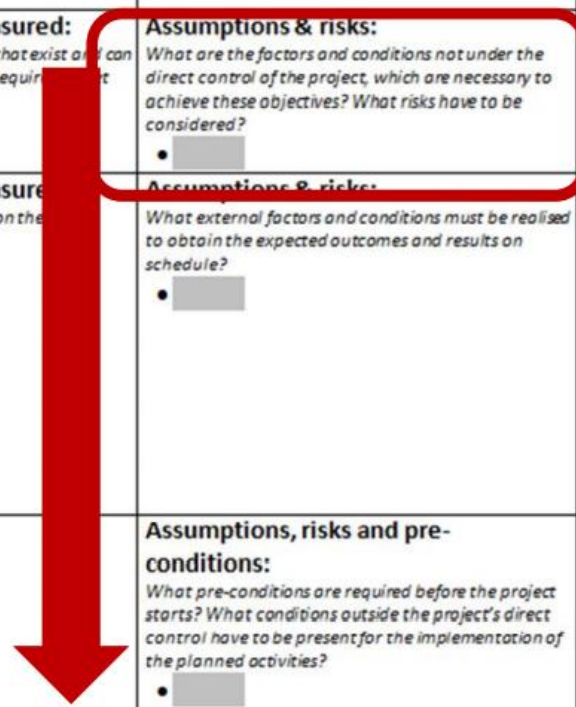
Meetings minutes

OVI

SOURCES

LFM: assumptions & risks

LOGICAL FRAMEWORK MATRIX – LFM

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LFM: assumptions & risks

External factors beyond our control that nevertheless influence the successful achievement of objectives at all levels and project feasibility over time.

Column 4 reflects our recognition of these external factors and integrate them within our Intervention logic

Goal: mitigate negative impact in order to increase our probability of success (mitigation strategy).

SO: to develop and implement a joint, modern, interdisciplinary Master program in Educational Leadership

OVI: number of students enrolled in the first year

Assumption: Educational Leadership is an appealing field of study for our target audience

Mitigation: a) Professional profile and career opportunities clearly identified; b) Convincing promotional campaign organized

LFM: assumptions & risks

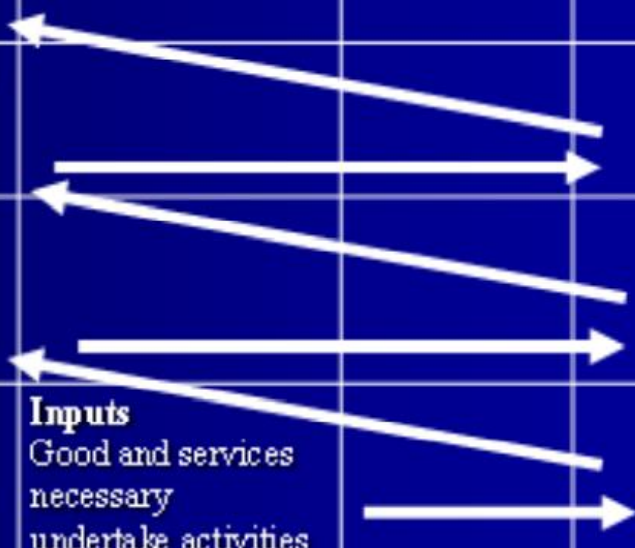| Project Description (Objective Summary)	Indicators (Objective Indicators)	Means of Verifications	Assumptions
Goal (Development Objective): The higher-level objective towards Which the project expected to contribute			
Purpose (Immediate Objective): The effect which is expected to be achieved as the result of project			
Outputs: The results that the project management should be able to guarantee			
Activities: The activities that have to be under taken by the project in order To produce the outputs	**Inputs** Good and services necessary undertake activities		

Figure 4.1 How To Read The Logical Framework Matrix

	Results chain	Indicator	Baseline (value & reference year)	Target (value & reference year)	Current value* (reference year) (* to be included in interim and final reports)	Source and mean of verification	Assumptions
Impact (Overall objective)	The broader, long-term change to which the action contributes at country, regional or sector level, in the political, social, economic and environmental global context which will stem from interventions of all relevant actors and stakeholders.	Quantitative and/or qualitative variable that provides a simple and reliable mean to measure the achievement of the corresponding result. To be presented, when relevant, disaggregated by sex, age, urban/rural, disability, etc.	The value of the indicator(s) prior to the intervention against which progress can be assessed or comparisons made. (Ideally, to be drawn from the partner's strategy)	The intended final value of the indicator(s). (Ideally, to be drawn from the partner's strategy)	The latest available value of the indicator(s) at the time of reporting (* to be updated in interim and final reports)	Ideally to be drawn from the partner's strategy.	Not applicable
Outcome (s) (Specific objective(s))	The main medium-term effect of the intervention focusing on behavioural and institutional changes resulting from the intervention (It is good practice to have one specific objective only, however for large Actions other short	(see definition above)	The value of the indicator(s) prior to the intervention against which progress can be assessed or comparisons made.	The intended final value of the indicator(s).	(same as above)	Sources of information and methods used to collect and report (including who and when/how frequently).	Factors outside project management's control that may influence on the impact-outcome(s).

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Annex 2. Project Design Matrix (PDM)

NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
Impacts •	•	•	•
Outcomes •	•	•	•
Outputs •	•	•	•
Activities	Inputs		

A. Project framework matrix[1]

What is the sustainable benefit for the target group? List of relevant Outcomes. Refer to E.2. above.	How will you be able to determine that sustainable benefit for the respective target group has been achieved? (Indicators)	Reporting on Outcomes / sustainable benefit to the respective target groups
D10: A culture of scientific dialogue and cooperation between the participant institutions and with stakeholders is developed.	Please provide qualitative/narrative indicators. Add quantitative measures where possible. Please indicate means of verification.	You will be asked to fill in this section during reporting.
D11: Participating institutions have integrated the dimensions of gender, diversity & inclusion.		
D12: Participating institutions have made their projects visible to the scientific community and interested public.		
Furthermore, choose one or more outcomes that are relevant for your project from the box T1-S9		
If applicable, add your project-specific outcomes P13,... ...		
List of short-term use of results	**How will you determine that your project results are applied and used? (Indicators)**	**Reporting on short-term use of results**
Use of result 1:	Please quantify wherever possible. Else please provide a qualitative / narrative assessment. Please indicate means of verification.	You will be asked to fill in this section during reporting.
Use of result 2:		
Use of result 3:		
Use of result 4:		
Use of result 5:		

[1] See guidelines 3.6., including tables 1 and 2, for more information on the theory of change and for definitions of impact, outcomes/sustainable benefit for the target group, short-term use of results, immediate project results/outputs, and (SMART) indicators.

PROJECT MANAGEMENT IN SIMPLE WORDS

Teamwork

Communication

Problem solving

Risks

PROJECT MANAGEMENT

Budget

Deadlines

Goals

Planning

Toolkit

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PROJECT MANAGEMENT IN SIMPLE WORDS

Project management is how organize and manage resources that are necessary to complete a **project**. A **project** is a piece of work which is not a process or an operation. It has a start, an end, and goals. ...

The **project** success or failure is based on the people involved in the project.

PROJECT MANAGEMENT CYCLE

INITIATION

PLANNING

EXECUTION

PERFORMANCE/
MONITORING

CLOSING

- Project Strategy
- Governance
- Delivery structure

PROJECT MANAGEMENT FAILURE?

EXECUTION

- Project Strategy
- Governance
- Delivery structure

- Lack of **coordination** of resources and activities
  - Lack of **communication** among partners
    - Poor estimation of **duration**
    - Lack of control over **progress**
  - Lack of **quality assurance** control

PROJECT MANAGEMENT FAILURE?

Identify Risks → Asses Risks → Create action plan to reduce risk

Defaulting partner

Sleeping partner

Late delivery/slow progress in general

Turnover of key personnel

PROJECT STRUCTURE

1. Division of work (Work Packages and Tasks)

2. Division of work during the project (Months) (Work Plan/Timetable)

3. Division of responsibilities between partner

4. Division of products (List of deliverables)

PROJECT ORGANISATION STRUCTURE

Steering Level — Steering Committee | Advisory Board

Project Management Level — Project Manager

Operational Level — WP1 Leader | WP2 Leader
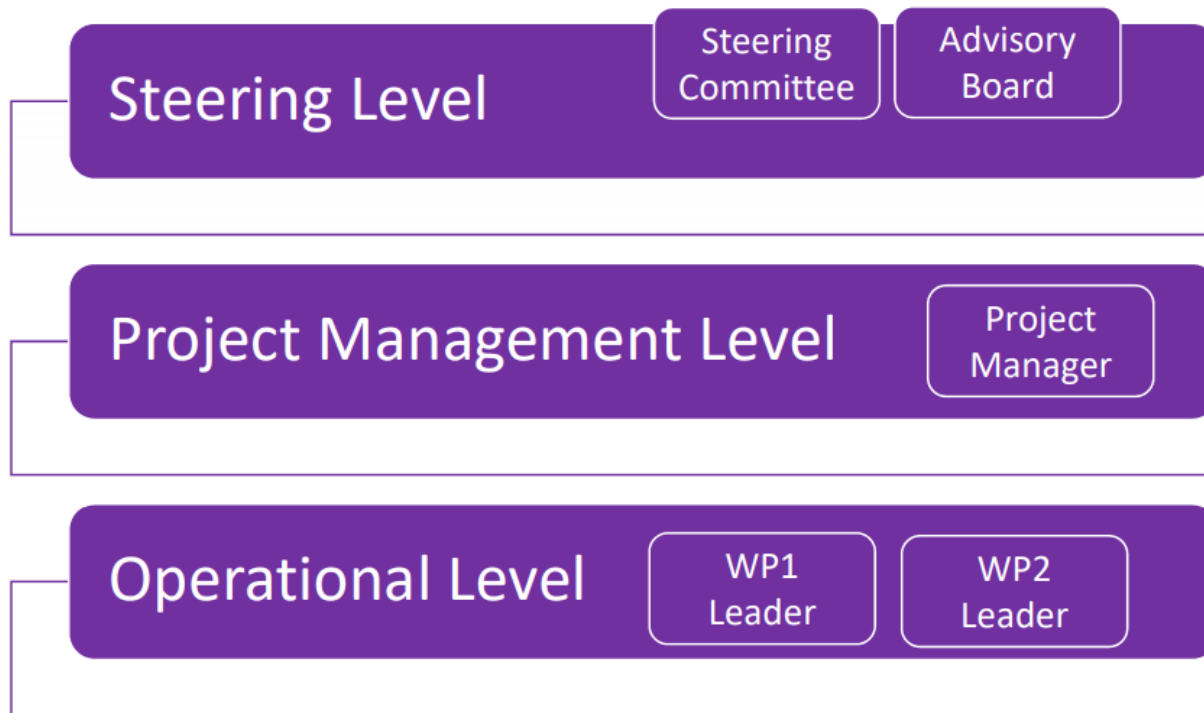
CONTRACTUAL PROCEDURES

Grant Agreement (GA)

Partnership Agreement (PA)

Mandates/Letter of intent or interest/MOU

Confidentially Agreement (research)

FINANCIAL MANAGEMENT

Centralised

Decentralised

Mixed of both

- Which one is better?

Advantages and disadvantages

MANAGEMENT TIPS

TIPS

- Don't forget the human element. You're not alone ... teamwork
- Communication is IMPORTANT
- Always ask questions, never assume
- Understand that there's conflict on every **project**
- Be the participant observer

Thank you
for your
attention!

https://site.unibo.it/toolkit/en