



PROJECT UNLOCK

UNLOCKING FUNDING FOR BUSINESSES



**MALTA
EMPLOYERS**



CHECK-IN

EU HELPDESK MANUAL

A Step-by-Step Guide
for Organisations

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Table of Contents

Introduction	2
1. Why an MOP?.....	4
2. First things first, research!	4
3. Who are your stakeholders?	6
4. Define your Operations	8
5. How will you communicate?	10
6. Monitor and Evaluate	12
Conclusion	14

Introduction

This document was developed as part of the Erasmus+ project **Unlock**. It presents a step-by-step guide on how one can establish an **EU Helpdesk** within their organisation.

What is an EU Helpdesk?

An EU Helpdesk functions as a comprehensive one-stop-shop for information, guidance, and support in relation to funding. Its primary role is to simplify access to the often complex landscape of EU and national funding opportunities by providing clear, reliable, and up-to-date information.

The scope of an EU Helpdesk is to assist individuals and organisations in gaining access to funding opportunities available to

them, by supporting them in identifying relevant schemes, understanding eligibility criteria, and navigating the application process.

By serving as a trusted reference point, the Helpdesk not only increases awareness of available opportunities but also empowers its users to successfully access and benefit from the funding instruments designed to support their growth and development.

What is project Unlock?

Project Unlock is an Erasmus+ project coordinated by the **Malta Employers' Association**, in partnership with **Cross Cultural International Foundation (CCIF Malta)** and **Check-In Association (Portugal)**.

In this project, two EU Helpdesks were set up, one within the Malta Employers Association (in Malta) and one with Check-in Association (in Portugal). Each target different audiences and offer a mix of different methods of support, based on their different needs.

The project focused on launching and promoting the EU Helpdesks in order to establish the service and engage target audiences, while also piloting a range of educational and training activities. Following the conclusion of the project, the EU Helpdesks are intended to continue operating on a permanent basis. Below is a summary of the EU Helpdesks set up at Malta Employers and Check-In.

	EU Helpdesk at Malta Employers	EU Helpdesk at Check-In
Target Groups	Members of the Malta Employers who are: • Employers • SMEs (micro to large businesses)	• Youths (15-25 years old) • Youth workers
Scope	Supporting private companies in accessing schemes and grants that drive growth and development.	Informing users about funding opportunities available to them which aim strengthen their knowledge, capacity, and awareness.
Services being offered	1. Information Sessions 2. Training Sessions 3. One-to-one Meetings	1. Information Sessions 2. Training Sessions

Why this document?

Two separate Manual of Procedures (MOP) for the functioning of an EU Helpdesk in Malta and in Portugal were developed in project Unlock. However, due to the sensitive nature of the documents, which relied on private organisational data to design tailored EU Helpdesk services, the two MOP documents have been designated as confidential.

Nevertheless, this document serves as a blueprint for other organisations wishing to establish their own EU Helpdesk and support their audience/s.

This document outlines how one can go about designing their own MOP, including information on the preparatory work, operational guidelines, communication strategy, and the monitoring & evaluation plan needed for establishing one's own the EU Helpdesk within their organisation.

1. Why an MOP?

The purpose of an MOP is to standardise, document, and communicate how a service, such as the EU Helpdesk, should function. By providing a clear set of processes, responsibilities, and operational guidelines, the MOP ensures that the service is delivered with consistency, accountability, and quality.

Beyond serving as a reference tool for staff, the MOP also acts as a safeguard against knowledge loss or supporting continuity even in the event of personnel changes. Developing such a document is therefore essential not only for the correct establishment and smooth deployment of the Helpdesk, but also for securing its long-term sustainability and effectiveness.

2. First things first, research!

The effectiveness of any newly developed service is directly dependent on the extent to which its target audience is understood. For a service to succeed, it must be built around the genuine needs, challenges, and expectations of its expected users.

Launching a service without first validating the demand for it risks misalignment, low uptake, and inefficient use of resources. Similarly, no organisation can effectively cater to its audience without first identifying and analysing their specific needs, preferences, and aspirations.

For this reason, it is essential that an organisation undertakes structured research among its target audience.

Such research enables the organisation to uncover concrete needs, highlight knowledge gaps, and identify opportunities for added value. With these insights, it becomes possible to design and deliver 'solutions' that directly address the identified gaps, thereby ensuring that the Helpdesk remains relevant, impactful, and sustainable in the long term.

What did project Unlock do?

In project Unlock all three partners undertook primary research to better understand the needs of their audience/s, the challenges they face and identify knowledge gaps to exploit. Project partners individually commissioned an online survey amongst their audience/s, aiming to assess their levels of awareness, knowledge, and experience in relation to local and EU funding opportunities.

The survey took the form of an online questionnaire. The questionnaire was designed to be anonymous since personal data was not relevant to this study. It included mostly close-ended questions, with yes/no or multiple-choice answers provided. Only a few open-ended questions were included only to allow for the possibility of additional comments or feedback. Ultimately, the survey sought to achieve the following:

1. **Categorising the audience:** determining their level of interest, awareness, experience, knowledge, and capacity in relation to both local and EU funding.
2. **Confirmation and identification of EU Helpdesk initiatives:** the survey also sought to confirm and identify the need for specific EU Helpdesk initiatives it could offer. It also aimed to determine the audience/s' preferred communication methods, topics of interest, and training formats.
3. **Determining Challenges and Barriers:** the survey aimed to identify the main challenges and barriers the audience faced in relation to local and EU funding, in order to develop mitigating solutions.

The results of this research played a pivotal role in shaping the project MOPs, which are essential for the effective functioning of the EU Helpdesks at the Malta Employers and Check-In. The findings also ensured that the services being provided are directly based on the identified needs and priorities of its target users.

3. Who are your stakeholders?

The next step is to conduct a thorough analysis of all stakeholders who may directly or indirectly influence the functioning of the EU Helpdesk. Stakeholders are not limited to end-users alone; they include any individuals, groups, or institutions that can impact the service, either positively or negatively. For example, government authorities may influence operations through new policies or regulations, while other organisations offering similar services may create competitive pressures. Likewise, social partners, industry associations, and funding bodies may shape expectations, priorities, and opportunities.

By systematically identifying and classifying these stakeholders, distinguishing between those who support, oppose, or remain neutral, an organisation is better equipped to anticipate challenges, leverage partnerships, and design strategies that maximise the Helpdesk's effectiveness. Such analysis not only helps in managing risks and mitigating potential conflicts but also ensures that the Helpdesk remains responsive to the broader ecosystem in which it operates.

Conducting a Stakeholder Analysis

Stakeholder analysis is a critical process in development of an EU Helpdesk, aimed at identifying and understanding all the stakeholders who have an interest in or can affect the various EU Helpdesk initiatives.

The significance of undertaking a stakeholder analysis lies in its resulting guide to better decision-making, fostering effective communication and ensuring the successful implementation of the EU Helpdesk.

By systematically mapping out who the stakeholders are, their levels of influence and interest, and how they might react to different EU Helpdesk services and initiatives, organisations can anticipate potential support or resistance and respond strategically.

What did project Unlock do?

A stakeholder analysis was conducted by the Unlock project partners for each EU Helpdesk, given the variations in services being provided and target audiences. All relevant stakeholders were primarily identified. These included individuals or institutions, both internal and external.

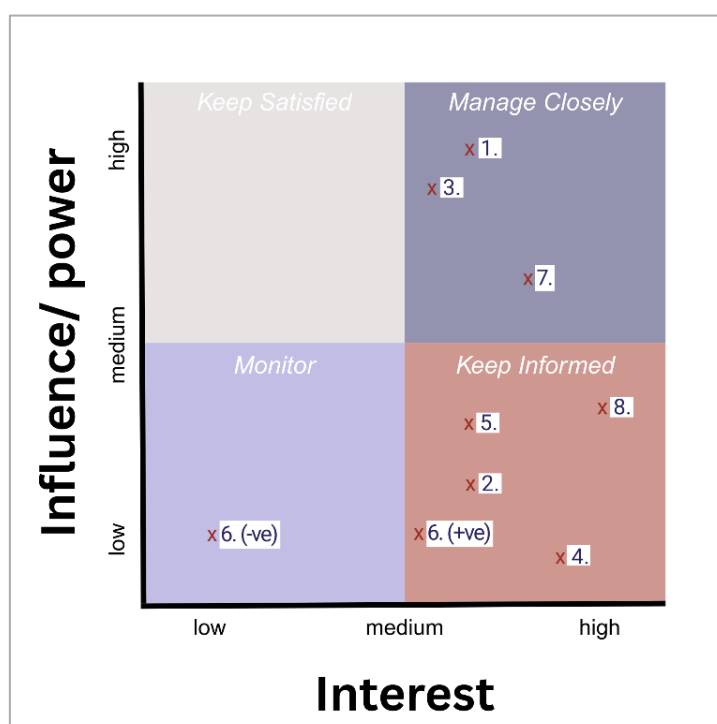
A representation of the Stakeholder Analysis conducted for the EU Helpdesk at Malta Employers can be found below.

Stakeholders	Interest	Influence/Power
Registered members with Malta Employers - Employers (general) - HR/ Finance representatives - Director/CEO/Owner	- HIGH - MEDIUM - MEDIUM	- MEDIUM - LOW - HIGH
Potential new members New Association Members (general)	HIGH	LOW
External - Registered Employers with CCIF - Other Social Partners - Consultancy Agencies - Managing Authorities (for local and EU funds)	- HIGH (+ve) MEDIUM (-ve) LOW - HIGH - HIGH	- MEDIUM (+ve) LOW (-ve) LOW - MEDIUM - MEDIUM

Once identified, stakeholders were classified according to certain characteristics: their level of interest and the amount of influence/power to disrupt, oppose or hamper. The power-interest matrix below, visually maps this process to help determine who needs to be closely managed, informed, consulted, or simply monitored. The value of this exercise lies in assessing the potential interest and influence each stakeholder has on the EU Helpdesk.

For instance, potential service users represent the primary target group and should therefore be 'managed closely.' Their power and influence are considered high, as their level of engagement, or lack thereof, can directly shape the relevance and success of the Helpdesk's initiatives.

At the same time, stakeholder analysis may also reveal groups with relatively low influence but significant interest, making them valuable partners for collaboration. In such cases, these stakeholders can be categorised under 'keep informed,' ensuring that their perspectives are acknowledged and that opportunities for cooperation are not overlooked.



4. Define your Operations

The next step is to define how the EU Helpdesk will operate in practice. This goes beyond simply listing the services to be provided; it requires developing a holistic framework that clarifies the overall objectives of the Helpdesk, the strategies to achieve them, and the mechanisms through which services will be delivered.

At this stage, the research findings play a central role. By identifying the needs, knowledge gaps, and barriers faced by the

target audience, the organisation can ensure that the Helpdesk's services are not generic, but instead serve as tailored 'solutions' to these challenges.

This alignment transforms the Helpdesk from a static information point into a dynamic, user-oriented support system that responds directly to real demand. In this way, the design of operations is anchored in evidence, ensuring both relevance and long-term effectiveness.

What did project Unlock do?

The findings of this research provided clear and compelling evidence in support of establishing a structured EU Helpdesk service within the Malta Employers' Association. The survey results confirmed a strong and widespread interest among members in receiving enhanced support to better access both local and EU funding opportunities.

Furthermore, respondents expressed consistent interest and identified significant challenges that the Helpdesk can address. Notably, members cited a lack of awareness, limited internal resources, and complex application processes as primary barriers. This led to the formulation of the three EU Helpdesk services at Malta Employers: information provision, training and one-to-one support.

Designing your Operations Plan

Once the main services of the EU Helpdesk have been identified, it is important to step back and consider the bigger picture by asking fundamental questions: What is the Helpdesk aiming to achieve? What is its overarching goal? What specific objectives will guide its work? Answering these questions ensures that the service is not only well-structured but also purpose-driven.

Three key elements should be included in this planning stage:

🌀 **Mission:** Defining a clear mission provides the foundation for the Helpdesk, articulating its purpose and the value it seeks to create. A well-formulated mission statement helps guide strategic choices and ensures alignment among all stakeholders.

🌀 **Objectives:** Establishing clear and measurable objectives is critical to translating the mission into practice. Objectives provide direction, set priorities, and create benchmarks for evaluating progress and impact over time.

🌀 **User profiles:** Understanding the intended users of the Helpdesk is essential. In the context of supporting access to EU and national funding, this involves

assessing their levels of familiarity, awareness, knowledge, and capacity to apply for funding opportunities. This analysis ensures that the Helpdesk is tailored to their realities and positioned to address actual needs rather than assumed ones.

What did project Unlock do?

🌀 **Mission:** The EU Helpdesk at the Malta Employers' Association established its primary mission as promoting the uptake of available funding opportunities, addressing and overcoming barriers through practical solutions, and empowering its members to enhance their knowledge, capacity, and access to resources.

🌀 **Objectives:** The EU Helpdesk at Check-In identified three clear objectives to guide its operations. Each objective was designed following the SMART criteria (specific, measurable, achievable, relevant, and time-bound) to ensure clarity, focus, and the ability to track progress effectively.

🌀 **User profiles:** Prior research played a crucial role in understanding the audience that the EU Helpdesk at the Malta Employers' Association aimed to serve. Based on this research, users were categorised into three distinct profiles, reflecting differences in experience, knowledge, and familiarity with funding opportunities. The results were as follows:

	Newcomer	Intermediate	Experienced
% of the target group (local funding):	29%	63%	8%
% of the target group (EU funding):	53%	42%	5%
Definition:	No prior or minimal familiarity, awareness, knowledge, and capacity.	Some past familiarity and capacity; aware and knowledgeable of some opportunities available.	High familiarity, quite aware and knowledgeable of the various opportunities available; has internal capacity but could still benefit from external support.

Having this data on hand is invaluable when planning events. For example, when organising an information session, the user profiles indicate that the majority of participants are newcomers with limited familiarity with EU funding. This insight allows the Helpdesk to focus on providing clear, foundational information about basic funding opportunities, ensuring the session is relevant and effectively addresses the audience's needs.

5. How will you communicate?

The next step is to define a comprehensive **Communications Strategy**. This involves clarifying how the Helpdesk will interact with its audience, how users will be able to communicate with the service, and what approaches will be used to attract new audiences. Equally important is outlining how the Helpdesk intends to maintain continuous engagement with its users, ensuring sustained interest, participation, and trust over time.

A well-developed communications plan also provides an opportunity to evaluate the effectiveness of existing tools and channels, such as newsletters, websites, social media platforms, or direct outreach. By critically assessing current practices, the organisation can identify strengths,

gaps, and areas for improvement. At the same time, the strategy should encourage creative thinking and the exploration of new tools and methods that can extend the Helpdesk's reach, enhance visibility, and reinforce the clarity and impact of its message.

Lastly, if the Helpdesk is targeting more than one distinct audience, it is important to adapt communication tools, methods, and messages to each group. Different audiences may vary in their familiarity with funding opportunities and in how they prefer to receive information. Tailoring communication in this way ensures that messages remain relevant, accessible, and effective

How can users reach you?

The first step is to define the channels through which users can reach the Helpdesk. While it may be useful to establish a dedicated email address to provide clarity and visibility, it is not always necessary to create entirely new means of communication, such as a separate telephone line distinct from that of the host organisation. What matters most is that the communication channels, whether existing or newly introduced, are reliable, user-friendly, and accessible.

It is equally important to ensure that these channels do not create unnecessary barriers for users. For instance, phone calls and emails should be answered promptly, and queries should be handled efficiently to avoid frustration or loss of trust. By strengthening responsiveness and clarity in communication, the Helpdesk can demonstrate professionalism, encourage engagement, and build long-term credibility with its audience

How will you reach users?

The next step is to establish the means of communication between the EU Helpdesk and its audience. As the Helpdesk operates within an already established organisation, this process begins by reviewing the existing channels currently used. The key task is to evaluate whether these methods

are effective in delivering the intended messages, fostering engagement, and encouraging participation. It is also important to consider the type of service being promoted when selecting communication methods.

What did project Unlock do?

As part of its research, the organisation included questions related to communication. Respondents were presented with the organisation's existing communication methods and, for each Helpdesk service, were asked to indicate their preferred means of communication, with an additional 'other' option to capture any new suggestions. The results revealed an overwhelming preference for one existing method, indicating no immediate need to introduce new communication channels, whilst reassuring the Helpdesk that their messages will be received.

How will you reach out to new audiences?

It is essential to act proactively and to continuously seek improvement when delivering a service. Relying solely on the size of the existing audience is not enough; a communication strategy should also aim to strengthen relationships with current users while attracting new ones. To achieve this, organisations should explore broader and more diverse communication methods, such as social media campaigns, targeted digital advertising, or collaborations with media outlets.

Selecting the right methods requires a clear understanding of the target audience. Different groups engage with different

platforms: for instance, younger audiences may be reached more effectively through platforms like TikTok or Instagram, while working professionals may respond better to news portals, LinkedIn, or business networks.

Beyond digital tools, in-person engagement should also be considered. Attending or hosting events can foster trust, provide visibility, and create valuable opportunities for direct interaction with potential users.

Engaging with your audience. What do you need them to know?

Lastly, it is important to define the key messages that the Helpdesk intends to communicate to its audience. These messages should clarify not only what services are available but also why they are valuable and how they respond to users' needs. For example, when promoting an upcoming information session, the message should specify the intended audience, whether the session is intended for newcomers, intermediate users, or experienced users, so that participants immediately understand its relevance to them.

Equally, the newly established Helpdesk must be promoted to the organisation's existing audience, ensuring that

stakeholders are aware that this new service is available and accessible. Beyond the initial launch, a long-term communication plan is needed to keep the service visible and top of mind without overwhelming or alienating users. This could include periodic reminders, success stories, and practical updates.

To strengthen engagement, messages should also address the barriers and challenges identified during the research phase, as this demonstrates direct relevance and draws users in by showing how the Helpdesk can provide solutions.

6. Monitor and Evaluate

The final section of an MOP focuses on monitoring and evaluating the Helpdesk and its services. While the two terms are often used together, they represent distinct but complementary processes.

🌀 **Monitoring** is the ongoing process of tracking activities and outputs to ensure that services are being delivered as planned. It involves regular data collection, such as the number of queries received, attendance at information sessions, or response times to emails. Monitoring provides immediate insights that allow for adjustments in day-to-day operations.

Why is M&E important?

Monitoring and evaluating the Helpdesk are critical for maintaining the quality, relevance, and sustainability of its services. Ongoing monitoring ensures that current activities remain efficient and user-oriented, while periodic evaluation ensures

🌀 **Evaluation**, on the other hand, is a more in-depth and periodic assessment of whether the Helpdesk is achieving its intended objectives and creating meaningful impact. For example, an evaluation may examine whether businesses supported by the Helpdesk went on to apply for or secure funding, or whether user awareness of funding opportunities has measurably increased. Evaluation looks beyond outputs to assess outcomes and long-term relevance.

that the Helpdesk, as a whole, continues to meet its mission and adapts to changing user needs and funding landscapes. Together, they create a cycle of learning, accountability, and continuous improvement.

The Role of KPIs

To make monitoring and evaluation effective, it is essential to establish clear Key Performance Indicators (KPIs) for individual services. For example, KPIs might include number of queries received

or the number of participants in a training session. These indicators help measure both efficiency and impact, providing benchmarks against which progress can be assessed.

Feedback Mechanisms

Another crucial component of monitoring and evaluation is the establishment of appropriate feedback mechanisms. Feedback allows users to share their experiences and perceptions, offering valuable insights into what works well and what needs improvement. Different services and events may require different methods of collecting feedback:

🌀 For **information sessions** or **training**, feedback forms (digital or paper-based) can be distributed at the end of the event to capture participants' satisfaction and suggestions.

🌀 For **one-to-one consultations**, a short follow-up email or survey could be used to assess whether the advice provided was clear and useful.

🌀 For the **overall Helpdesk**, periodic online surveys or focus groups can provide broader insights into user satisfaction, unmet needs, and areas for growth.

When choosing feedback methods, it is important to consider accessibility, user

burden, and the type of information required. For instance, busy professionals may prefer a quick online poll, while more detailed insights might be best gathered through interviews with frequent users.

What did project Unlock do?

The Helpdesk's Monitoring and Evaluation Plan incorporated not only KPIs and methods of data collection, but also clear objectives, frequency, and assigned responsibilities.

Defining objectives within the M&E plan ensures that each activity has a clear scope and purpose. Objectives answer the fundamental question of why the initiative is being carried out and establish the goals that need to be achieved, giving the process direction and meaning.

Including frequency and responsibility in the plan strengthens accountability and ensures consistency. By setting a frequency, the organisation can schedule monitoring and evaluation activities in advance and integrate them into its annual operations plan.

Assigning responsibility from the outset further clarifies who is in charge of each activity, reduces the risk of oversight, and ensures that monitoring and evaluation remain an integral part of service delivery rather than an afterthought.

Below is an excerpt of the Plan developed:

Objective	KPI (Key Performance Indicator)	M&E Method	Frequency	Responsibility
Increase awareness of funding opportunities	Number of users reached.	Track social media engagement, attendance, etc	Annual review.	XXX
Build user capacity to apply for funding	Number of training sessions delivered. % of participants reporting increased confidence.	Attendance records; Post-training questionnaires	After each training. Annual review.	XXX
Ensure long-term relevance of the Helpdesk	% of users rating the Helpdesk as relevant and useful	Online satisfaction surveys	Annual Review	XXX

Conclusion

Establishing an EU Helpdesk requires careful planning, structured processes, and a clear understanding of the needs of its target audience. This document has outlined the essential steps for creating a Manual of Procedures (MOP), from conducting research and analysing stakeholders to defining operations, designing a communications strategy, and setting up monitoring and evaluation systems.

The lessons drawn from **project Unlock** demonstrate that an EU Helpdesk is far more than an information point, it is a dynamic service that empowers users, removes barriers, and provides tailored solutions to help individuals and organisations access funding opportunities.

By following a systematic approach, organisations can ensure that their Helpdesk is not only relevant at launch but also sustainable, impactful, and adaptable to evolving user needs.

Ultimately, the success of an EU Helpdesk lies in its ability to remain user-focused, transparent, and proactive. By continuously refining services, engaging effectively with stakeholders, and evaluating outcomes, organisations can position their Helpdesk as a trusted and lasting resource that supports growth, development, and participation in EU and national funding opportunities.