

PROCESS OF CONCEPT DEVELOPMENT FOR EDUCATIONAL PROJECTS CO-FINANCED FROM THE EUROPEAN UNION FUNDS WITH EXAMPLES OF SELECTED COMMUNES OF THE KUJAWSKO-POMORSKIE PROVINCE

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Purpose: The purpose of this article has been to present the education management stages in terms of concept development for educational projects from the European Union funds with examples of selected communes of the kujawsko-pomorskie province for the 2021-2027 financial prospective.

Design/methodology/approach: The article presents a case study for educational projects development by selected school-operating authorities: the Osielsko Commune and the Świecie Commune. The elaboration features the stages of educational projects concept development, from a development of the process of territory-specific strategies in the kujawsko-pomorskie province, a diagnosis of the schools supported and project works for co-funding applications development. The research methods applied included the case study as a methodology framework, semi-structured interviews with representatives of the school-operating authorities and school headmasters as well as the analysis of the contents of source documents; strategies, diagnoses, operational programmes, specify the programme and other EU guidelines.

Findings: The analysis of the projects concept development process in the Osielsko Commune and the Świecie Commune has demonstrated that the elaboration of educational projects involved a few stages, it was time-consuming and required a substantial institutional coordination; engagement of, e.g., representatives of the Marshal's Authority, Local Authorities, Primary Schools, Experts. The development of territory-specific strategies, diagnoses of schools and development of the final co-funding applications were of key importance, however the last stage turned out most complex. The participation of two external operators at the last stage facilitated coordinating the work of project teams, performing an in-depth analysis of schools, teachers and students as well as adjusting the scope of support in the project to the needs diagnosed in the light of the competition guidelines. The process was extremely long-lasting (over 4 years), which resulted in a decrease in the real value of the funds allocated (36.78% depreciation according to the GUS statistics for 2021-2025) and too intensive engagement of the representatives of many parties, namely the managing institution, school-operating authorities and representatives of schools; it is, therefore, indispensable to streamline the process in the successive prospective.

Research limitations/implications: Compliant with the EU co-funded projects management concept, it is indispensable to evaluate the project completed, which will facilitate an objective evaluation of adequacy, efficiency, usefulness, effectiveness and stability of support to schools,

teachers and students. The limitations to a further research process identified include high costs of evaluation research which account for 3-4% of the value of projects, resulting from a need to apply complex research methods, both quantitative (e.g., desk research, survey questionnaire, competence tests), and qualitative (e.g., in-depth interview, focus groups, participant observation, case study), ensuring representativeness and the right sample size number (namely, school headmasters, teachers, parents, students, civil servants engaged in project management) and field research in many educational facilities. With all that in mind, the subject of the Author's further research she plans to present in the successive article will be a comparative analysis of the projects for co-funding selected, which will facilitate identifying similarities and differences in the quality of intervention logic of preliminary project premises and finally accepted co-funding applications.

Practical implications: Presentation of the education management stages in the light of developing the concepts of educational projects from the European Union funds and conclusions from the analyses performed call for modifying the procedures applied in the competitions held by the Marshal's Authorities all across Poland. It mostly refers to: *Stage I. development of territory-specific strategies* in which representatives of schools, adequately trained before in terms of the possibilities of financing the facilities' specific educational needs, teachers and students must be included in terms of strategic records, namely types of projects, actions and performance indicators in the light of the EU guidelines. On top of that the programme documents should be most detailed to avoid substantive discrepancies while developing the strategy attachments (project premises). For *Stage II. A development of the diagnoses of the schools included in the support in the light of the project premises approved*, a diagnosis document template development is proposed considering a lack of clarity of the process for headmasters and primary schools-operating authorities. Due to exceptional labour-intensiveness of *Stage III. Development of applications for co-funding* and expecting the maximum effect-to-effort ratio, the local authorities are recommended to get engaged in the process of development of project concepts and applications for co-funding of external operators. Irrespective of those recommendations in the successive financial prospective it seems necessary to definitely shorten the procedures and to make them more efficient to ensure a faster funds flow and a greater effectiveness of educational interventions.

Social implications: The projects using the applications presented in this elaboration will have a social impact as offering an adequate support will facilitate providing equal educational opportunities to students by enhancing the quality and effectiveness of general education in primary schools all across Poland.

Originality/value: The article's original value is a practical approach to discussing the process of developing the concept of educational projects. The article is addressed to the local authorities as school-operating bodies which are the EU funds beneficiaries in the regional policy.

Keywords: education, primary schools, project, EU funds.

Category of the paper: research paper.

1. Introduction

The priority of the educational policy in Poland is to ensure an efficient system of education and lifelong teacher professional development which would respond to the real school needs and which will facilitate teachers' enhancement of professional competences and working tools

development. Schools should develop learning organizations which will keep improving their development (Hajdukiewicz, Wysocka, 2015, p. 7). at the same time it is important to promote self-education with teachers (Fila, Matuszczak, Rybińska, 2015, p. 43), and the key role in that process should be played by school headmasters (Fischer, Taylor, 2012, p. 235; Kordziński, 2010, p.10). The teacher reaches a high teaching effectiveness through providing experimental classes engaging students by using state-of-the-art equipment. Interestingly, Polish teachers, less frequently than their counterparts in other countries, apply the teaching techniques which gett the students most engaged, e.g., work in small groups, longer projects (Hernik, Malinowska, Piwowarski et al., 2014, p. 5; Kordziński, 2022, p. 71). In modern teaching a dynamic development of technologies calls for classes in a modern and engaging form, using innovative teaching aids which, through their multi-sensory impact enhance efficient acquisition of knowledge and storing it in long-term memory (Łukasik-Gębska, 2024, p. 4). Therefore, modern education faces permanent needs of additional equipment, improvement of managers and teachers in the light of the 21st century challenges (Ziółkowski, 2017, p. 8).

Unfortunately, the funds from the local authorities' budgets are insufficient to provide an effective support to educational facilities and so the school-operating authorities are interested in funds acquisition from the European Union (Adamowicz, Kmiecński, 2017, p. 68). In the 2021-2027 financial prospective, the process of educational projects acquisition and execution for the local authorities is mostly carried out as part of the regional policy with support from the European Social Fund. The local authorities develop a strategy for the regional policy and develop the key projects they consider indispensable for the strategic development goals assumed. Having signed the applicable agreements with Marshal's Authorities, the strategies are included in the regional operational programmes implementation system. Then Marshal's Authorities launch a contracting procedure; the process of identifying the key projects in dedicated regional competitions. The local authorities as the schools-operating body or educational facilities providing general education, supported as part of the project, are obliged to develop the adequate co-funding applications to be evaluated and recommended for co-funding.

The process of co-funding for regional educational projects is extremely labour-intensive and distributed for the entire 2021-2027 financial prospective, namely from the strategy development stage, strategy approval, signing the co-funding applications, application evaluation and execution. The key stages of the process, understood as a strategy development, including the concept of educational projects and co-funding applications with the Osielsko Commune and the Świecie Commune as an example, have been presented in this elaboration.

2. Educational projects concept development process

From the analysis of the strategic documents specified below, the interviews with 2 representatives of the operating bodies in the Osielsko Commune and in the Świecie Commune and talks with 14 headmasters of educational facilities, it was identified that the process of educational projects concept development for primary schools covered by the support was extremely labour-intensive, with a long time-horizon, and it required an engagement of many interest-holders. In a nutshell, the following key stages can be specified:

Stage I: development of territory-specific strategies

The first step initiated in 2022 was to establish the local authorities' partnerships which included agreements between the local authorities and appointing the Steering Committee, which provided the institutional grounds for further strategic actions. The Świecie Commune was appointed the leader of the partnership for the Świecie Territory-Specific Policy Area (OPPT Świecie, 2023), while the city of Bydgoszcz – for the Strategy of Integrated Territory-Specific Investment Projects (ZIT Bydgoszcz, 2023). In 2022-2023 the ZIT Bydgoszcz Strategy project was developed, and in 2023-2024 – the OPPT Świecie Strategy. The strategies, next to the socioeconomic diagnosis, propose a list of the key projects (project premises), which were considered indispensable for the development goals execution. For each project premise, e.g., the topic, project execution location, tasks, the estimated total cost, time horizon and the key indicators were defined. In 2023, the ZIT project went through social consultation and the procedure of strategic evaluation of impact on the environment, whereas for OPPT Świecie the consultation was held a little later in 2024. The ZIT Bydgoszcz Strategy was approved with a resolution of the ZIT Steering Committee no 2/2023 of 2023, whereas the OPPT Świecie Territory-Specific Strategy – with resolution of the OPPT Steering Committee no 6/2024 of 31 October 2024. The last step involved signing the Territory-Specific Agreements between the partnerships of ZIT Bydgoszcz (on 7 September 2023) and OPPT Świecie (on 24 November 2023) and the Kujawsko-Pomorskie Province. The agreements signing was the key stage of institutionalising both strategies as it officially included them into the system of implementing the program of the 2021–2027 European Funds for Kujawy and Pomorze and initiated the contracting procedure, which is the process of identifying the key projects in dedicated competitions.

The difficulties and limitations of that stage were substantial, especially discrepancy among the decision-makers in terms of the hierarchy of the programme intervention directions and division of the funds for respective local authorities. At the same time there was observed an insufficient competence level of the staff who faced problems attributing precisely the projects to the adequate programme measures, estimating the real budgets and identifying the risk of double scopes of intervention, which resulted in numerous working documents discrepancies. The problems were even more serious due to the fact that in the strategy development period the competition regulations and guidelines were still unknown, and the programme documents were developed to be very general. Partners had only partial knowledge about access criteria, financial limits and procedure requirements specified in the operational programme and providing the programme with more details, which made the records more prognostic (2021-2027 European funds for Kujawy and Pomorze. Detailed Description of the Priorities of the 2021-2027 European Funds for Kujawy and Pomorze Programme). As a result, some project proposals needed to be many times revised due to some missing intervention logic, inadequate attribution of projects to measures and underestimated costs in terms of the indicator values assumed. As a result, the project premises were a few times updated since at the successive stages there appeared new substantive and formal discrepancies which required providing more precise scopes of support, indicators and budgets.

It is therefore indispensable to include the representatives of schools, properly trained before in terms of opportunities of funding the specific educational facilities, teachers in terms of strategic records, namely the project types, measures and indicator values to be achieved in the light of the applicable EU guidelines. The programme documents should be also developed in more detail to avoid substantive discrepancies while developing attachments to the strategy.

The support characteristics for the project types and the applicable guidelines in programme documents for the OPPT Świecie Strategy (Measure: FEKP.08.27 General education OPPT) and for the ZIT Bydgoszcz 2023 Strategy (Measure: FEKP 08.12 General education BYDOF-IP) are presented in Table 1.

Table 1.*Support characteristics for the project types and the applicable guidelines*

No	Support characteristics	Applicable guidelines
TYP 1	<p>Support for students to provide equal educational opportunities by enhancing the quality and effectiveness of general education as well as by increasing the accessibility and social inclusion:</p> <ul style="list-style-type: none"> a. enhancing the key, socio-emotional, basic, transversal competences or green or digital transformation-related competences; b. internships; c. inclusive education, with diagnosing the individual development or educational needs or providing psychological and pedagogical assistance, with counteracting premature education system abandonment; d. actions resulting from upbringing or supporting function of school, or problems prevention; e. education and vocational advisory service. 	<ol style="list-style-type: none"> 1. Accessibility must be understood as provided in the Guidelines for equality principles for the 2021-2027 EU funds. 2. Inclusive education must be understood as provided in the “Substantive report. Inclusive education in Poland – opening balance 2020”, Centre for Education Development, Warsaw 2021. 3. The school’s educational or supporting function must be understood compliant with Art. 1, clause 3 of the Education law Act. 4. Individual development or educational needs, psychological and pedagogical assistance must be understood as the needs and assistance provided for in Regulation of Minister of National Education of 9 August 2017 pertaining to the principles of organization and psychological and pedagogical assistance in public kindergartens, schools and facilities.
TYP 2	<p>Support for representatives of the staff to increase the quality of general education:</p> <ul style="list-style-type: none"> a. increasing competences or acquiring the professional qualifications; b. enhancing the key, socio-emotional, transversal competences or green or digital transformation-related competences; c. helping with solving teaching or educational problems; d. education and vocational advisory service tasks; e. preparation for inclusive education; f. developing networks of cooperation, learning from one another or mentoring programmes (e.g., teacher training school model). 	<ol style="list-style-type: none"> 5. Competences or qualifications must be understood as provided in Annex 2 to the 2021-2027 tangible programme execution progress monitoring guidelines. 6. Key competences must be understood as provided in the Council Recommendation of 22 May 2018 pertaining to the key competences for life-long learning. 7. Digital competences must be understood as provided in the Guidelines for projects with the European Social Fund Plus funds in the 2021-2027 regional programmes. 8. Basic and transversal competences must be understood as in the Integrated Skills Strategy (detailed part).
TYP 3	<p>Support for schools and facilities helping to enhance the effectiveness and quality of general education:</p> <ul style="list-style-type: none"> a. external support in terms of education and vocational advisory service; b. education conditions quality improvement; c. getting adapted to the green or digital transformation requirements, including digitalization enhancement; d. inclusive education, including accessibility improvement (e.g., accessible school model); e. innovative teaching methods implementation. 	<ol style="list-style-type: none"> 9. Socio-emotional competences must be understood as provided in the 2030 Integrated Skills Strategy (general part). 10. Accessible school model, https://model.dostepnaskola.info/ 11. Teacher training school model, https://www.ore.edu.pl/category/projekty-powier/szkola-cwiczen/ 12. Marginalised area must be understood compliant with the list included in the Annex to the Territory policy of the kujawsko-pomorskie province. 13. As for digital competences support, the digital competences standard must be applied as of "DigComp" framework version valid on the admission announcement date.

Source: own elaboration based on: Detailed Description of the Priorities of the 2021-2027 European Funds for Kujawy and Pomorze Programme (2024) pp. 358, 432, and programme guidelines.

The scope of support types is multi-layered, expanded and the catalogue of measures has been general and technical, written in a project-specific language, which makes it hard for the school-operating authorities to interpret. Yet another difficulty is due to a dispersion of guidelines regulating, e.g., accessibility, inclusive education, key competences or digital standards which should be considered at every support planning stage. As a result, only a person with EU project experience can translate the above notes into cohesive, practical and feasible operational measures.

Stage II: diagnosis development for schools supported in the light of the project premises approved

As part of the ZIT Bydgoszcz Strategy for the Osielsko Commune one project premise was developed for the educational project including 4 primary schools referred to as ZIT-BY-55: "Educational projects for primary schools of the Osielsko Commune". In the OPPT Świecie Strategy for the Świecie Commune, there were developed three project premises the beneficiary of which are 10 primary schools: OPPT-SW-26: "A sound mind in a sound body"; OPPT-SW-27: "I learn to teach/ learn" and OPPT-SW-28: "English is easy". The key parameters for those project premises are provided in Table 2.

Table 2.

Key parameters of project premises for educational projects in the Osielsko Commune and in the Świecie Commune

Strategy no	Project topic	Project value	Time horizon	Support scope planned:
ZIT BY-55	Educational projects for primary schools of the Osielsko Commune	EUR 245 088	2023-2025	1. Organizing extracurricular activities for 500 students of 4 schools: a) English, b) ICT, c) maths and life sciences, d) English, e) entrepreneurship. 2. Held for 100 teachers: a) modern education conference, b) training workshops, c) emotional-social competences conference.
OPPT 26	A sound mind in a sound body	EUR 235 295	2025-2026	1. Holding swimming qualification training for 60 teachers. 2. Swimming classes for 150 students.
OPPT 27	I learn to teach/ learn	EUR 542 391	2023-2025	1. How-to-learn classes with 700 students. 2. English classes for 700 students. 3. Training workshops for 140 teachers. 4. Purchase of 21 computer displays for 10 schools.
OPPT 28	English jest easy	EUR 446 435	2025-2027	1. Enhancing the foreign language development competences of 43 teachers 2. English classes for 200 students.

Source: own elaboration based on project premises in the strategies approved: Territory-Specific Strategy of the Świecie Territory-Specific Policy Area; 2021-2027 Strategy of Integrated Territory-Specific Investment Projects for the Bydgoszcz Functional Area.

Working on the key projects, the schools the support has been addressed to as indicated in the project premises were obliged to develop the diagnoses which would justify the scope of support proposed. At that stage there were identified many doubts due to the fact that for the diagnosis document, formal requirements and elaboration standard were missing, while the applicable regulations did not oblige the schools to attach the diagnosis to the co-funding application. At the same time the project premises were many times updated, which was yet another substantial organizational burden for school headmasters. Some of them faced difficulties with updating the diagnoses and considered the process hardly justifiable in such dynamically changing conditions. As a result, most schools only provided a general declaration to make such diagnosis, without publishing the diagnosis document in the public space. It would have been reasonable to develop a diagnosis template as the process was unclear to the headmasters and primary-schools-operating authorities.

Stage III: co-funding applications development

The last stage was the greatest challenge for the local authorities as it required application development teams, to include school-operating authorities and schools supported, to be appointed. The teams intention was transferring the concepts from the project premises and the needs of target groups (schools, teachers and students) to the cofounding application fields compliant with the regulations of the competitions announced. Due to the extreme labour-intensiveness of the last stage and expecting the maximum effect-to-effort ratio, both local authorities decided to outsource professionals, who had to satisfy many requirements, especially the adequate level of knowledge and considerable co-funding application development and educational projects management experience. On top of that, high communication and managerial skills for project team management, especially planning, delegating tasks, motivating the project team members, were desired. The project team members representing schools included headmasters and teachers; potential coordinators of schools to be supported.

In developing the cofounding application, the key role was played by the operators who moderated the work of the project teams in terms of:

- defining the obligatory parameters as boundary conditions provided for in the project premises approved,
- practical discussion of 3 types and support opportunities according to the competition regulation,
- presenting the formal and substantive requirements for implementing 3 types of support,
- estimating the maximum expenses for each primary school considering the number of students and teachers,
- performing an in-depth analysis of the needs of schools, teachers and students,
- planning the key measures together with the schedule and budget,
- substantive discussion and proposal of changes leading to budget approval.

During the process there were some difficulties due to insufficient substantive knowledge and a varied level of engagement of the team members representing schools and so the external operator organized additional explanatory sessions, specified the competition requirements further and defined deadlines in the work schedule.

3. Conclusions

A dynamic development of technology determines the necessity of open teaching process following the formula based on state-of-the-art tools, multi-sensory methods and regular improvement of teachers' and managers' competences. At the same time, the local authorities' limited financial potential result the public education development draw more and more on the EU funds acquired from regional programmes as the key instrument for primary school support in the 2021-2027 prospective.

The entire process, including strategic planning and educational project concept development involved many stages and required more than 2 thousand interest holders participating. ZIT and OPPT territory-specific strategies development, social consultation and formal approval by the steering committees taking resolutions have facilitated including them to the 2021-2027 European Funds for Kujawy and Pomorze programme implementation system. It was most complex and demanding to appoint the interdisciplinary project teams with representatives of the school-operating authorities, headmasters, teachers, the student council and precise transfer of strategic concepts to co-funding applications compliant with the requirements of the competition regulations.

In that process the key role was played by outsourced operators through competition and selection as the development of operationally-feasible application required specialist competences beyond the standard resources of schools and local authorities. At the same time for every local authority, the operator engaged coordinated the work of the project teams, specified more precise parameters pre-defined in the project premises, interpreted the types of support while referring to the regulation. Regional competitions announced in the kujawsko-pomorskie province defined the principles of providing support precisely only at the recruitment stage, specifying the final framework of intervention. Yet another barrier was due to dispersed regulations which included, e.g., inclusive education, accessibility, key competences and digital standards, which required a high level of expert knowledge and EU project experience.

The process of regional educational projects co-funding, from strategy development to final application development, turned out extremely labour-intensive and burdensome organization-wise. Many-years procedure also led to a significant devaluation of the purchasing power value of the funds allocated to education due to the time lapse and inflation. In the successive financial prospective it seems, therefore, necessary to shorten the procedures a lot and to make them

more efficient to ensure a faster flow of funds and a greater effectiveness of educational interventions.

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