E-MANUAL

**GUIDE TO PLANNING EU PROJECTS IN THE HEALTH AND SOCIAL HEALTH SECTOR**

3.1 PROJECT IMPLEMENTATION AND MANAGEMENT

What is a project?

- A temporary initiative undertaken to create a unique product or service (PMI - Project Management Institute, 1996).
- A complex effort, involving interrelated tasks performed by various organizations, with well-defined goals, schedules and budgets (Russel D. Archibald, 1994).
- A set of coordinated efforts over time (Kerzner, 1995).
- A collection of people and other resources temporarily brought together to achieve a specific goal, usually with a set budget and within a set period (Graham, 1990).
- A complex, unique and time-determined enterprise aimed at achieving a set goal through a continuous process of planning, execution and control of differentiated resources with interdependent cost-timing-quality (ISIPM) constraints.
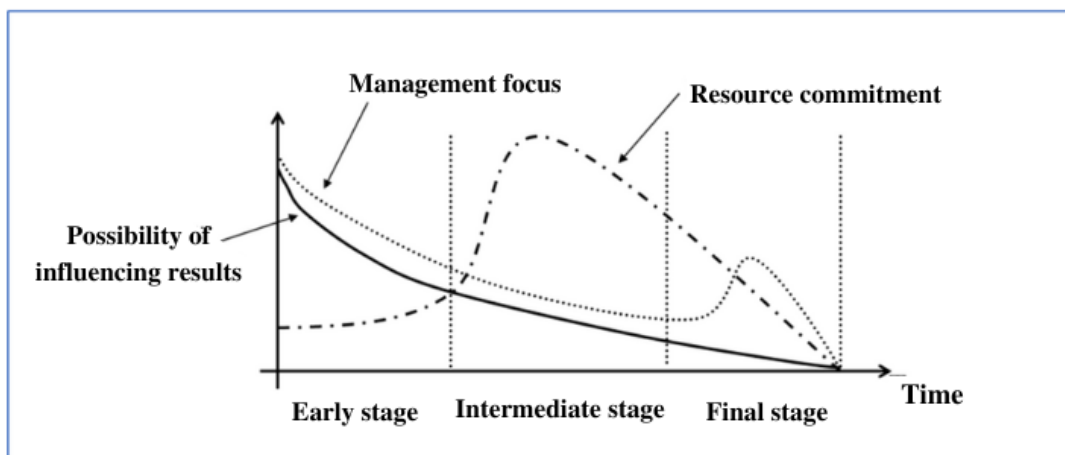
What are the main features of the project?

Complexity: numerous actors (internal and external) of different cultures and technical backgrounds participate in the implementation phase, each of whom

operates by carrying out multiple activities related to each other by close bonds of interdependence of a logical, physical and temporal nature.
Uniqueness: it is aimed at the realization of an object or service that does not pre-exist, and for which the novel content does not allow the application of standardized procedures. The social-economic-financial and market scenario is different every time.
Temporality: it has a set start and end date, and the partnerships that are to execute it are created specifically for the duration of the project.
Uncertainty/Progressive Development: it is planned before its implementation, but both the mission (scope) and the timeline are continually under review. It is characterized by precariousness and instability in the scheduling of its implementation cycle. The risks and uncertainties are higher in the beginning while as the project progresses, the chance of success gradually increases.
Constraints: it is achieved with a limited amount of resources (economic, human, time, etc.).
Orientation: it is oriented toward a goal, end product, service or output, typically definable in terms of time, cost and quality (the triple constraint).
Life cycle: the "life" of a project can be identified through start and end points, which can be associated with a time scale. As the project moves forward it goes through distinct phases. The life cycle includes all phases from the start point to project completion. Each phase of the project has its own specific characteristics but each phase is related to the others.

Project categories

Variables in the classification of projects can be:
- scope of the project: commitment of human and/or financial resources, the scope and geographical spread;
- Project complexity: variety of goals and scope;
- Degree of project risk: degree of novelty, magnitude and complexity.

## What is project management?

Project management is:

Planning, organizing, monitoring, and controlling all aspects of a project and all

motivations involved in achieving project goals within predetermined time, cost, and performance criteria.

Systemic management of a complex, unique and time-limited enterprise aimed at achieving a predefined goal through a continuous process of planning and control of differentiated and limited resources with interdependent time-cost-quality constraints.

Application of knowledge, professional and personal skills, methods, techniques and tools to the activities of a project in order to meet its requirements.

The set of tasks required to accomplish a project's goals is often referred to as the project scope, which, however, is only one of three crucial elements to be kept in balance
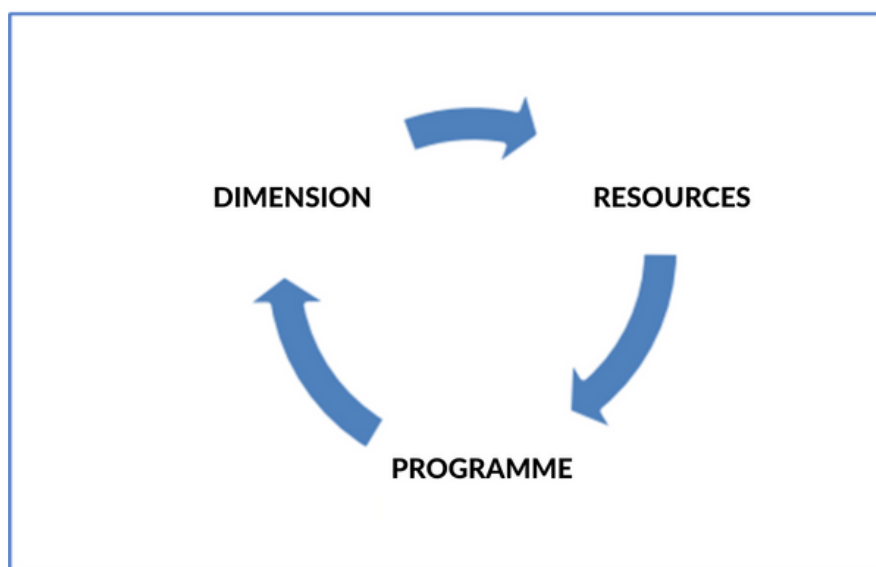
Resources are defined as the personnel and equipment needed to achieve the project goals. These are expenditure items that are therefore dependent on the project budget. In European projects, the grant awarded by the European Commission is fixed for the entire funding period, so the budget, and the resulting availability of resources, can only be increased by contributions provided by partner institutions or complementary funding. The schedule indicates the timing and sequence of the various activities, as well as the total duration of the project.

While the first elements can be modified as needs change, the funding period is limited to one, two or three years, as defined in the contract. However, it is possible to request an extension of several months to complete the work. The three elements are

interconnected. For example, if a specific task takes longer than expected, more human resources will be needed or other tasks cannot be completed, resulting in a reduction in the scope of the project. No project is implemented according to the initial plan. Thus, sound management is a process of continuous planning and review, which can be illustrated as follows:
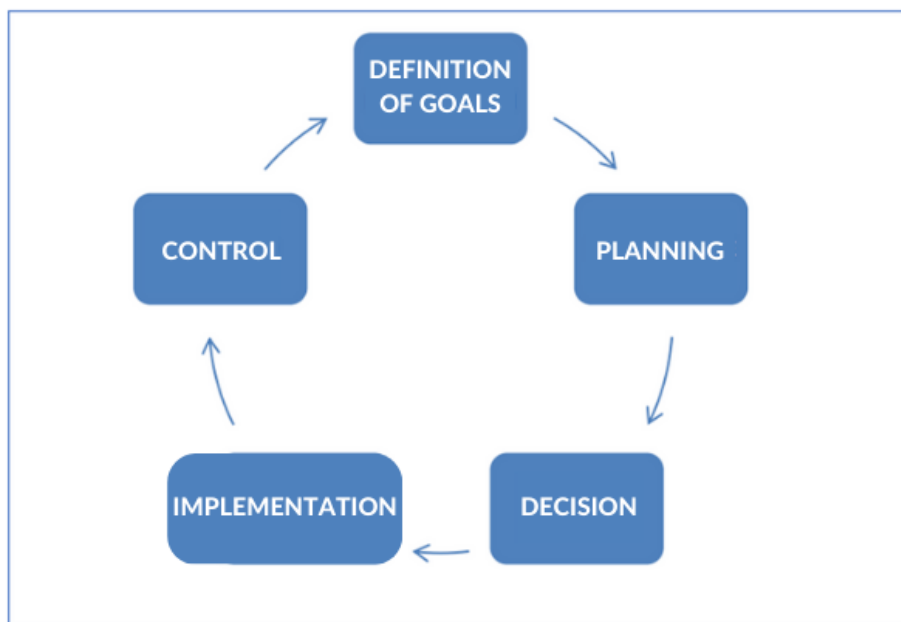
Why project management?

In order to properly manage a project, it is essential to apply a methodology based on strict principles and systematic rules, abandoning the illusion that the same results can be achieved by resorting to one's imagination, the whim of the moment, personal intuition, and individual experience gained. Making good use of project management does not mean having no problems, eliminating all risks, avoiding surprises: it means managing the project in a standardized and controlled way instead of carrying it out by continuing to manage emergencies with improvised interventions.

The goals of project management

- Give a realistic view of the project throughout the life cycle.
- Empower all stakeholders on specific goals.

- Highlight critical situations and propose viable alternatives in a timely manner.

- Outline the expected future development of the project.
- Propose and impose common regulations on all stakeholders.
- Ensure consistency between assigned partial goals and overall project goals.

The fundamentals of project management

- Explication of responsibilities for the integration of individual contributions to the project.
- Planning and control systems, for the prediction and integration of individual project inputs.
- The project team, as a place of integration of the contributions of all project participants.

The benefits of project management

- The assignment of responsibility for project results to one person.
- The certainty that decisions are made with the overall goal of the project in mind and not for the benefit of functional sectors.
- The early identification of problems and rapid implementation of corrective measures.
- The coordination of all functional inputs to the project.
- Increased staff motivation.

Costs to be included in the budget for project management

- •Costs for centralized planning and control functions.
- Data processing charges. Salaries and expenses of the project manager and any collaborators
- Costs for centralized planning and control functions.
- Data processing costs

The duties of the project manager (PM)

The PM plans, organizes, selects and places personnel, evaluates, directs, controls and guides from start to finish the project. Specifically, the PM has the following roles:

- Collaborate in defining goals and strategies; • identify project team members and define their responsibilities;
- Plan (schedule) the project;
- Ensure that all activities are scheduled and, therefore, are planned, budgeted, controlled and monitored;
- Allocate resources to individual activities.

The profile of the project manager: "soft" skills

- Flexibility: this is not to be understood as capitulation, but, rather, as pliability, malleability, and, more generally, a readiness to easily adapt to contingent situations that may not always be agreeable.
- Tenacity: this must never become obstinacy or stubbornness, but must translate into perseverance in pursuing certain goals.
- Skills of analysis and synthesis: through which to make more informed decisions.
- Willingness to dialogue: sensitivity and openness to one's interlocutors and, consequently, friendliness, affability, kindness and courtesy in interpersonal relations.
- Leadership: the project manager is usually attributed a high "density of responsibility" which is sometimes accompanied by a "labile attribution of power."

The role of the project manager

1. The first rule is to never accept anything as true unless you obviously know it to be so.
2. The second rule is to divide each of the difficulties to be examined, into as many small parts as is possible and necessary, to better solve them.
3. The third rule is to conduct your thinking in an orderly way, beginning with the simplest and easiest objects to know, and ascending, little by little and as if by degrees, to the knowledge of the most complex elements.
4. And lastly, to make such comprehensive lists and such general overviews as to be sure not to omit anything.

The project team
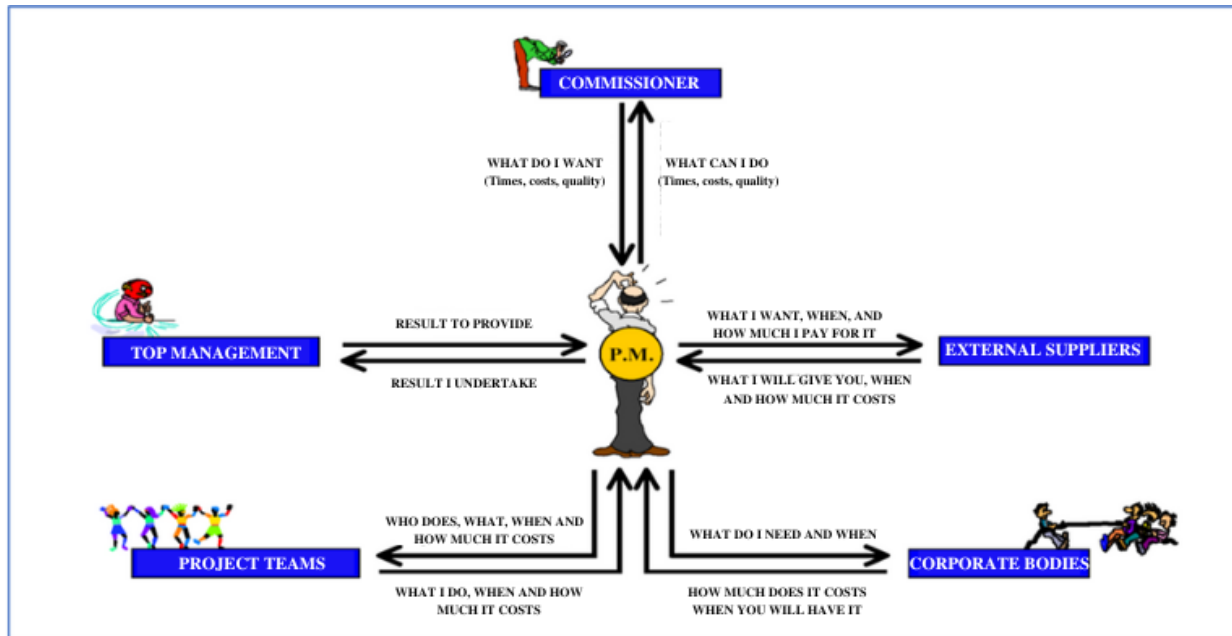
A project consists of various tasks. For each of these, personnel of certain experience and qualifications are required. In a broad sense, all participants in a certain project can be considered members of the project team. Typical project team figures are: the project manager, functional project leaders, various specialists (administrative, technical, etc.), and sometimes representatives of external organizations.

What are the conditions for forming a team?
- o Explicit identification of team members with definition of role and responsibilities;
- o Clear project goals;
- o Realistic work plan with clear deadlines;
- o well-considered rules on the flow of information;
- o leadership of the project manager.

Project stakeholders

Project stakeholders are "individuals and organizations actively involved in the project or whose interests could be affected by the implementation of the project. They can, in turn, influence the project and its results."

The Role of the Coordinator (or Lead Partner).

Once the project is approved, the Coordinator (or Lead Partner) no longer merely has the role of facilitator with the various partners, but of that of overseeing a real project. Good project management ensures that established procedures are adhered to in order to achieve the set project goals within the available budget.

The Coordinator must oversee the progress of various activities, financial aspects, organization of formal or informal meetings, and compliance with reporting procedures in order to ensure coordination of the project at technical and financial levels. To do all of this, the Lead Partner needs the support of all project partners, including a Steering Committee (or Steering Board) that monitors compliance with the conduct of the pre-determined activities, their effectiveness, and any strategic priorities.

After the project is approved, the Coordinator, with the help of the other partners, reviews the submitted project plan in detail for the purpose of its inclusion in the **Grant Agreement**. Goals, results and timelines for implementation should be verified, taking into account the real availability of human and financial resources. The different roles and responsibilities within the project will be confirmed according to the skills and experience of the various partners. *Transnational meetings* play a key role, so their organization must be undertaken professionally, taking into account the intercultural dimension of the European cooperation project. In addition, careful planning is needed for communication between meetings, which will take place online. To achieve quality results, constant *monitoring* of work progress and evaluation of processes and products against clear benchmarks are essential. The administrative workload, particularly the management of financial aspects, should not be underestimated.

The Coordinator, before starting the actual project, will carry out an internal meeting with their team in order to define:
- Expected outcomes.
- Programme and project indicators.
- Timing of activities.
- How to carry out the various activities.
- Roles and responsibilities of human resources on the Leader's staff (including making the project manager official).
- Roles and responsibilities of partners.
- Cash flows.
- Procedures and deadlines for reporting operations.

This very operational meeting will help prepare the project kit.

Administrative structure

From an administrative point of view, each partner organization is responsible for collecting and archiving documents related to the activities it carried out in reference to the project. Each partner must keep such documentation in an organized manner in order to provide it if requested, along with other official documents, for example, specific outputs or reports drawn up regularly.

Financial structure

Financially, each partner organization is responsible for its own expenditures, in accordance with the budget established for its activities, and for its own financial reporting, regularly providing the Lead Partner with all necessary information for possible verification and financial reporting of the entire project (progressive and final) to the European Commission.

Drafting the project kit

Drafting the project kit (guidelines in English) at the start-up stage is absolutely recommended and must:
1. condense all requirements related to the funding programme;
2. contain a roadmap for the implementation of the project by the partners (structures, procedures, actions, plans, responsibilities, deadlines, communication standards, the decision-making process, etc.);
3. include all templates (facsimile) to comply with the procedures.

Formal partnership agreement

The Coordinator is responsible for maintaining a good level of communication and relationship with all partners involved.

The partnership agreement (or covenants or contract or agreement), although not always mandatory, is strongly recommended, in order to establish certain "ground rules" for the operation of the partnership and provide some security for the partners by defining a priori and in a mutually agreed upon manner the procedural issues, as well as formalizing the individual responsibility of each partner. The terms of such agreements can, at times, be found in a template available among the programme documents and

possibly adapted to the particular situation.

Immediate procedures should be established in the agreement for issues such as, budget changes (as provided for in the Grant Agreement), dispute management (e.g., enforcement of penalties for financial mismanagement), official removal from the partnership of one or more defaulting partners, and IPR management. An additional key element of this agreement is to ensure that the Coordinator can satisfactorily monitor the quality of the activities carried out within the project and their reporting, before including them in the overall reporting process.

The kick off meeting

The Coordinator convenes the entire transnational partnership for the first official project meeting (kick off meeting).

The first communication, as a rule, is sent by the project manager to all "contact persons" included in the form and, in copy, to the legal representatives of each partner organization (always at the addresses included in the form), as well as to all persons, belonging to those organizations, involved during the project drafting phase.

The first meeting must be attended by all partners. If appropriately indicated at the design stage (both in the descriptive part and in the budget), there will already be indication of this to the steering committee (board). It is good that the first meeting be attended by a project contact person who will follow the content, accompanied by an administrative person.

When convening, an agenda will be sent out that should contain:
- o the presentation of the leader and each partner (for this purpose it is useful to share a project ppt template right from the start). Each partner will be allowed to prepare a maximum of 5 to 7 slides in English for a speech of 7 to 8 minutes maximum;
- o The recapitulation of project contents (partners, timeframe, goals, actions, roles, and budget)
- o Approval of the partnership agreement (sent in draft 5 days before asking for feedback);
- o The sharing of the project kit (anticipated via email);
- o The formal appointment of the steering committee and other project groups;
- o the next (immediate) steps (what to do and when to do it).

In some calls for proposals, it is explicitly required that the kick-off meeting be held in the city where the funding agency is based, this is to allow the Project Officer (the person in charge of following the entire project process) to attend.

Project Groups

Formal appointment of the Steering Committee and other project groups, such as working groups or technical groups often across the partnership, in relation to the activities listed in the application form, must occur as soon as possible (preferably at the kick off meeting). I

As an outcome of the kick-off meeting, the project manager communicates the various appointments, the role of each group, its functions and limits of competence, and how it interacts with other elements of the project. As a rule, the leadership of the group rests with that partner who has responsibility for the Work Package as outlined in the form.

Organizing meetings and events

Organizing and participating in transnational and interregional meetings requires time, effort and money on the part of all partners. Any opportunity for project partners to meet (in the presence or absence of any external stakeholders who have invested resources in the project or those who are directly affected by it), should be an opportunity to discuss issues at a general level, exchange experiences related to the project itself, and consider external developments (e.g., the possibility of inviting external observers).

Public events related to the project should take place periodically, possibly adhering to the schedule provided in the template (timing, location and type), allowing the host partner to use the event as a promotional tool (to publicize its participation in European projects, for example). Project manager, host partner and working group (which may exist for that given activity) should collaborate in organizing the event. Some calls explicitly require that the final event take place in Brussels or otherwise in collaboration with other partnerships of projects funded on the same call and on similar topics.

The number of representatives for each partner attending meetings or events must be, more or less, decided in advance within the partnership (and budgeted under "travel" or "meetings" or "events" expenses) or at least justified in relation to the workload.

Advice and assistance

The support and information services made available for each project by the Commission, the Agencies and the National Contact Points within each European programme should be utilised to the fullest extent possible. These resources can provide support in interpreting and clarifying aspects related to technical regulations inherent in European programmes or more general EU regulations. Their role is not limited to providing help during the initial development phase of the project, looking for suitable partners or acting as intermediaries in establishing the partnership, but they can also, where required, ensure that project implementation proceeds smoothly.

Training

Approved projects can take advantage of specific training made available at the programme level on subjects ranging from project management to finance and communication. Sometimes the training is aimed only at Lead Partners. In the absence of appropriate training for all organizations participating in the project, the transfer of acquired knowledge to all project partners is important in order to ensure that key messages are received and reach their intended recipients at all management levels. Again, time needs to be allocated, which will need to be evaluated in the budget (in addition to related expenses).