
E-MANUAL

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

3.2 DETAILED PLANNING AFTER SELECTION

Since each project is a complex and unique process, thorough and organic planning is essential in order to effectively pursue the established goals. Sound planning helps make complicated tasks clearer and enables the Coordinator and partners to recognize critical situations in a timely manner and to accept change more flexibly.

Detailed description of the Activity Plan

As soon as the application is accepted by the Commission and the amount of financial support is known, detailed planning for the first year must begin. If proper work has been undertaken in the planning phase, then the work plan already prepared for the application, with an indication of timing (dates of meetings and activities in the intervals), expected results and tasks and responsibilities, can form the basis for more detailed planning.

Planning	Detailed description of the activities
Content Planning	<ul style="list-style-type: none"> defining project goals defining results and goods defining quality indicators formulating monitoring and evaluation strategies
Management Planning	<ul style="list-style-type: none"> structure of main activities defining roles assignment and coordination of tasks
Human Interaction Planning	<ul style="list-style-type: none"> HR selection and groupwork establishment creation of a project culture, with shared values and common rules group formation and leadership process disputes management
Stakeholder and contact Planning	<ul style="list-style-type: none"> project environment analysis marketing strategies definition dissemination activity planning
Financial and Administrative Planning	<ul style="list-style-type: none"> costs and resources planning formulating contractual agreements defining systems and account procedure

At this point, the plan needs to be structured in a more precise way, activities need to be described accurately, with reference to time frames and actual human and financial resources. A number of planning tools exist within the project management activity to join all these factors and make them more visible to the project team. A valuable management tool is the use of work packages (WPs) for project organization.

The advantages of structuring a work plan into individual packages are:

- To ensure systematic collection and organization of project content and activities;
- To divide the project into smaller operational units, and then further subdivide, name and list them;
- To represent graphically the units and their contents in a tree structure in a clearer schematic manner.

Refinement of the Work Plan

With a view to effectiveness, the breakdown of the project into operational packages must be complete and include every detail. It makes sense to start with the goals in mind and ask, "What do we want to achieve, what will it look like, and what do we need to do to achieve it?" Dividing the project into smaller units provides the basis for more detailed planning of time, capacity and budget and may look something like the following:



Time planning

The tools available to link the work plan and its individual units to a schedule are numerous, but one of the more effective choices is the so-called "Gantt Chart" (from Henry Gantt, promoter of this type of planning). The Gantt chart will already have been included in the project proposal and Grant Agreement, so it is a matter of following it and updating it in case a project variation is required.

PO n°	Description	September	October	November	...
PO 1				X	
1.1					
1.2					
1.2.1			X		
...					
PO 2				X	
2.1					
2.1.1					
2.2				X	
...					
PO3					X
...					

Individual activities are divided sequentially into units of work, based on the amount of time they will require and clearly marking their start and end. Project goals and critical factors, in relation to available time, can also be included and highlighted in the chart. You can also name the people responsible and illustrate staff resources and other crucial factors. The advantages of a chart like this are the clear graphical representation and

transparency of all the data illustrated. It is also a very valuable communication tool within the project organization. Next is an example of a Gantt chart:

X= milestones, crucial points in the project structure

A column can be added to link activities to designated managers.

Organization of work units

Each work unit should be assigned to a specific individual or work group. A clear description of activities should be prepared to ensure clarity of communication among Coordinator, person or group responsible, and among all other project participants. The description should include the goals and all expected, interim and final outcomes.

For the sake of the quality and progress of the project, it is essential to have an open communication system regarding this key aspect of the work. Again, it is very useful to create lists.

It is possible to list in a table all the activities and deadlines scheduled in each business unit, with reference to timing and the person responsible. An activity description and scheduling table, for example, may look as follows:

Activity description (use the same numbers and titles indicated in the tree workplan and in the Gantt diagram)	Person and team responsible	Finalisation date
PO1 1.1 1.2 1.2.1 ...		
PO2 2.1 2.1.2 2.2 ...		
...		

The following is an example of a checklist for the contents of a business unit:

- name of the operating unit;
- person responsible;
- contents and activities;
- description of the expected results;
- start and deadline;
- human resources - number of working days/hours required;
- Links with other business units (sequence and overlap).

Project milestones

This is a key aspect of the project.

- The different stages of the project are marked by "milestones."
- These are important "intermediate goals" on the way to the final goal and tools for guidance.

- Milestones mark the conclusion of significant phases of the project and should be established by the group at the beginning of the work. They are considered achieved only when all planned activities have been satisfactorily completed. They also constitute important turning points that provide an opportunity to decide whether to stop, proceed, or turn back.
- Furthermore, they promote group motivation because they are a demonstration of the progress already made. Therefore, the group should not forget to celebrate a successfully achieved milestone.

In European projects, milestones always include Steering Committee meetings. All participants come together on these occasions so that many of the main activities can be discussed and planned at the meeting, where qualitative assessments, decisions, modifications or changes can be discussed and agreement reached after open discussion.

In between these meetings, other milestones are usually set, such as deadlines for submitting reports and applications, carrying out activities, or completing particular project products. All project participants should meet these important deadlines and complete their respective tasks and contributions on time so as not to jeopardize the smooth progress of the project. The milestones can be represented graphically in the diagram described above (Gantt chart).