JANFP4Health Training Module 2 EU4Health

Project Design & Management

Lisbon

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NFP4Health
Joint Action on Increasing Capacities of National Focal Points

This presentation is part of the action "NFP4Health" which has received funding from the European Union's Health Programme (2014-2020) under grant agreement No 101035965.

How to design a project

The project originates from an **idea** that is based and founded on **a specific need that is to be solved**. Writing a project means focusing and organizing the idea into the elements of design: context analysis, action focus, feasibility analysis and sustainability.

it is important to know that the idea must be consistent with the strategies and policy priorities given by the European Commission.

In the (creative) transition from idea to (structured) project, our consortium partners are and will be our co-creators and co-designers.

- White papers, Action plans, relevant policy documents on European strategies in the field
- The multi-year funding programme
- The text of the referenced call for proposal
- Other projects already funded

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The Consortium

The Consortium consists of the partners involved in the design and implementation of the project.

The types of partners can be different, we can have direct beneficiary partners, or indirect partners (who participate in the project by supporting some activities without receiving any kind of funding, but benefiting from the outcomes), third parties and stakeholders.

The project will clearly state the role of each partner, the contribution required and the type of participation.

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Balancing the partner countries

In considering the context of project implementation, i.e., where the project will physically be implemented, the geographic and thematic sphere, the scenario, and the socioeconomic context of reference, **attention must be paid to an appropriate balance of participating countries and respective areas** (i.e., Northern Europe, Central Europe, etc.), particularly if required by the specific call.

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The Need

The **analysis of already funded European projects** is essential for the submission of a winning European project.

This preliminary analysis makes it possible to **identify similar projects** that have already been implemented to avoid duplication of projects, both to find proposals that could be integrated with the solution to be proposed to make it effectively successful, and to find potential partners.

The analysis will be done by **searching the databases of funded projects**, depending on the relevant programme.

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S.M.A.R.T. Methodology

The use of **the S.M.A.R.T. method**, an MBO (Management by Objectives) business management method, is recommended for the strategic **definition of specific goals**.
Specific goals are defined and then the activities necessary to achieve them are indicated accordingly.

It is essential that the goals are consistent with the analysis that has been carried out with respect to the problem or need identified, but also in line with the outcomes we expect to achieve. **Goals are an important safeguard in the development and monitoring stages** as well as in the evaluation stage. Obviously, if the goals are too general they do not allow for proper project management and implementation.

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Drafting the final text

- Development and drafting of the final text, in which **all the elements of the project are detailed**.
- The final document will be **the official text of the project,** namely what will be presented to the European Commission (or the respective funding body).
- The final text of the project generally consists of: **(i) a brief summary of the intervention; (ii) the detailed description of the project**.
- Each Program or call requires specific modalities, information, documentation for the composition of the dossier, indispensable elements for the project to be considered for examination.

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Project Implementation

How the project will be carried out represents the methodology to be used, what it is intended to accomplish is its translation into activities, actions and timing. The how/what should be as detailed as possible.

It is essential to specifically **describe the action: who does what, when and how, resulting in the Work Plan**. In this way, we are also able to define the specific roles of each stakeholder.

Through a clear work plan, we are able to bring out: innovative methodologies, the scientific nature of our proposals, the real strategic added value in building the European partnership, etc.

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Dissemination of Results

The **expected outcomes** should never be underestimated: testimonies, film or photographic collections, reports, written documents, etc., are, always, extremely important as key elements in **achieving good transferability** (i.e., the ability to implement the same project by others in similar contexts).

It is always essential to provide for their **translation into multiple languages** so that they are "disseminated" in the various partner countries.

It is essential to plan a clear and specific "**communication, dissemination and exploitation plan**" (for project promotion and dissemination of outcomes-products) at the design stage.

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The Budget

It is essential to check the **economic feasibility and sustainability of the project**. Generally, attached to the call (or internally to it) are included the **rules for preparing the budget** (eligible costs, ceilings, etc.), indications of funding instalments

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Funding

Once ready, the text **of the project is presented** to the European Commission/funding body to request funding for implementation.

The project is **then analyzed and, finally, the funding body will decide** on the approval or rejection of the funding proposal. The duration of this phase is variable and depends on the selection procedures adopted by the various programs/calls for reference.

If the selection phase is successful, the negotiation phase begins, at the end of which the funding body and the proposing body sign a contract that will bind the parties for the entire duration of the project.

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The Problem Tree

While the other methodologies belong to design in general, the problem tree is a popular methodology in European design and is sometimes required within the template.

With the help of all partners and beneficiaries (the latter whenever possible), **problems and needs related to our project idea are identified.**

The problem tree represents **the placement of identified problems in a cause-and-effect diagram** (i.e., determining what causes what and what is caused by something else), represented vertically from bottom to top. The cause-and-effect links between different problems should be carefully checked as they form the basis of future design.

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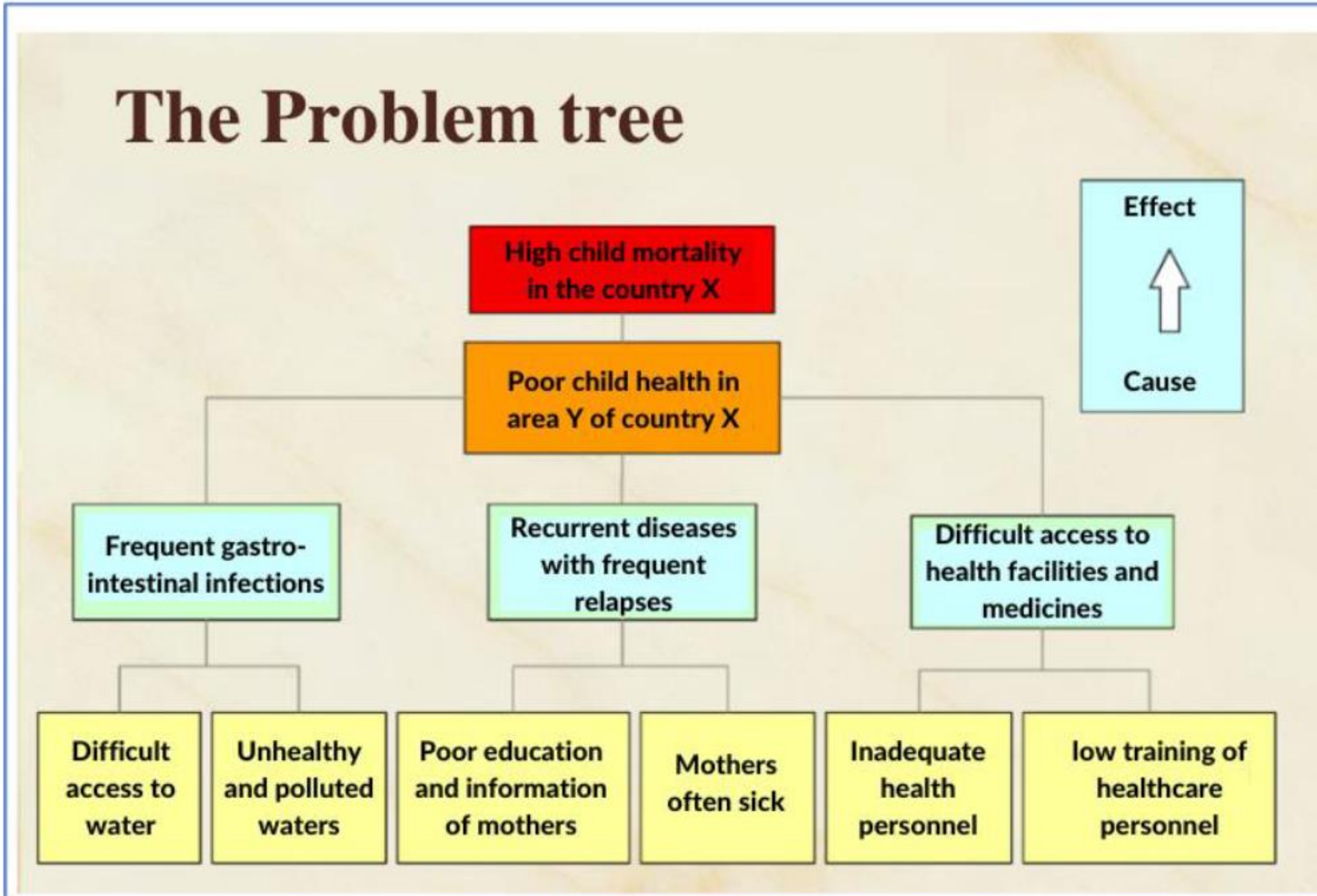

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The Goal Tree

Through the construction of the problem tree, **the problem/need situation at a given time is presented by clarifying the cause-effect relationships.**

Goal analysis starts from the problem tree to represent in a goal tree the expected future situation that would result from fully solving the problems detected and analyzed.

It represents **the transformation of problems** (current "negative" condition) **into goals** (desired future "positive" condition). If before we were dealing with cause-effect relationships, now we are thinking about the means to achieve the ends, the positive aspects.

We flip the problem over and write the goal as if it had been achieved: the goal tree then reflects a picture of the desired situation.

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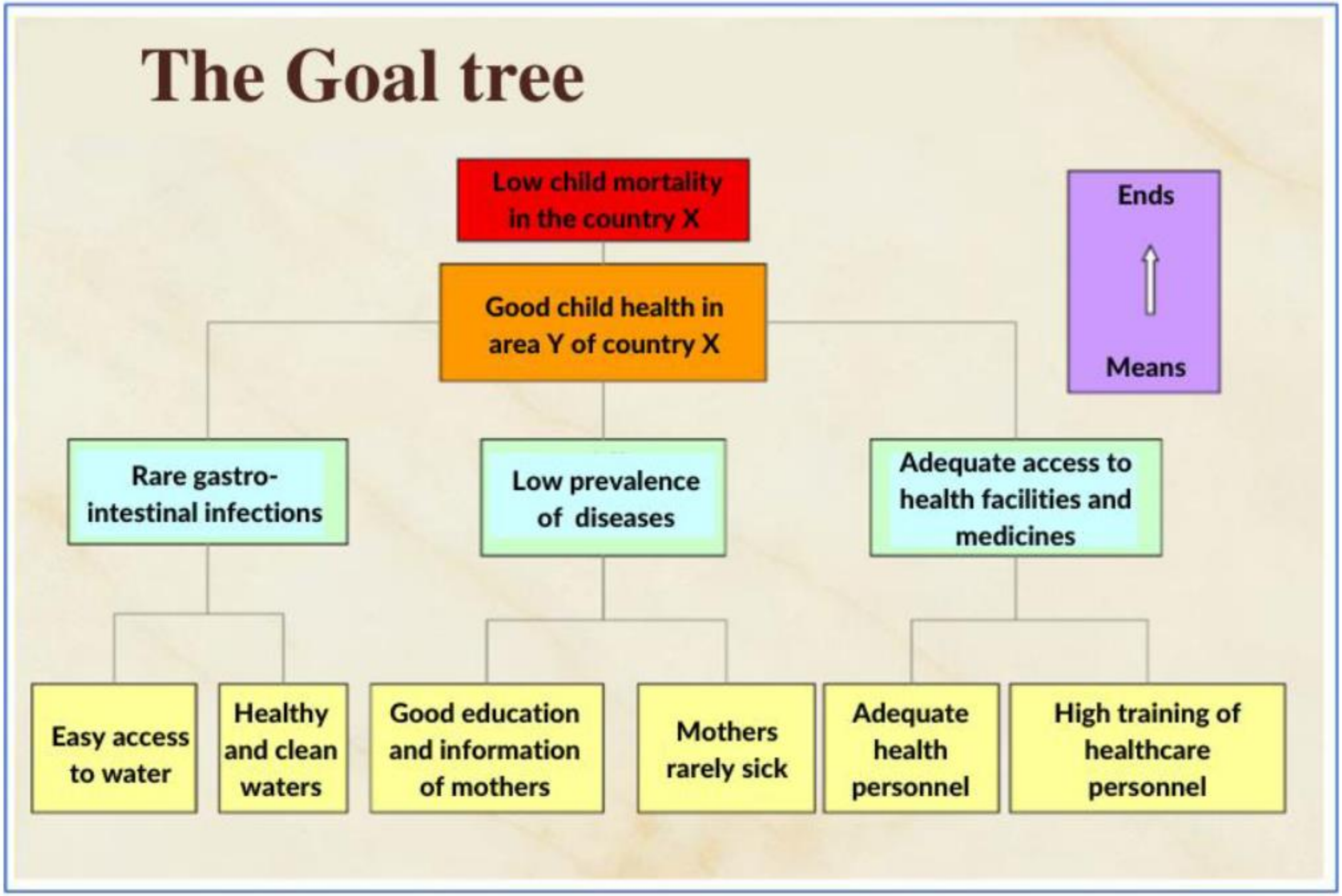

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The Logical Framework

The **Logical Framework** is **a design matrix**, widely used in programmes promoted by the European Commission and other international bodies, useful for clearly defining the different elements of a design intervention and visualizing them effectively.

	LOGIC OF INTERVENTION	INDICATORS	VERIFICATION TOOLS	EXTERNAL CONDITIONS
GENERAL TARGETS				
SPECIFIC TARGETS				
RESULTS				
ACTIVITIES		TOOLS	COSTS	
				PRECONDITIONS

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The Logical Framework

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INTERVENTION LOGIC: describes the basic elements of the project according to a bottom-up cause-effect logic. This means that activities lead to outcomes, outcomes lead to the achievement of specific goals and the achievement of general goals.

OBJECTIVELY VERIFIABLE INDICATORS: An indicator is what can be objectively observed when an outcome or goal is achieved. In the first three rows, a qualitative definition and a quantitative specification using appropriate indicators are given; in the fourth row, an estimate of the physical and non-physical resources required to perform each activity.

VERIFICATION SOURCES: We indicate in the first three rows, where and in what form the information will be sourced to assign values to the indicators in the previous column; in the fourth row, the estimated costs and source of funding for mobilizing the resources estimated as necessary.

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The Logical Framework

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HYPOTHESIS: external conditions, the favourable hypotheses whose non-occurrence may prevent the intervention from running smoothly or jeopardise the achievement of Outcomes and Goals). External factors (outside the direct control of the intervention), which are essential for the achievement of: Specific Goals, Expected Outcomes, Activities; below are indicated the preconditions that must be met before project implementation begins.

GENERAL GOALS: socioeconomic development goals as defined at the policy or programme level.

SPECIFIC GOALS: specific goals of the intervention that you wish to achieve.

EXPECTED OUTCOMES: Outcomes that contribute to the achievement of the specific goals.

ACTIVITIES: actions performed during the implementation of the intervention to achieve individual outcomes.

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The Gantt Sheet

Having completed the Logical Framework, the activities listed in the left column can easily be copied into a new table: **the Gantt Sheet**, (also called the time sheet or time
schedule).

The time schedule is written to conventionally **establish activity phases and times** and the **who does what**.

It is also useful for the purpose of considering the executive development of the project in case delays or suspensions occur due to "internal variables."

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The Time Schedule

Steps for preparing the Time schedule:
1. Activity List. The activities described in the QL summarize what the project proposes to put in place to achieve its goals. Once the activities have been identified, each is divided into operational tasks, the purpose of dividing activities into specific subtasks or responsibilities is to make them sufficiently simple and easily manageable. The method consists in dividing an activity into sub-activities (it is advisable to take each sub-activity and divide it into tasks). Each task, therefore, can be assigned to a person or a work group. The most frequently made mistake is to divide and subdivide activities in an illogical and unmanageable way.
2. Defining Competencies. Once the tasks have been identified, it is possible to specify the type of skills needed to accomplish them. Experienced staff often have already been identified at this stage, but this step remains a good opportunity for partnership members to compare notes to check whether the action plan is feasible given the human resources available.

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The Time Schedule

3. Agree Tasks. By allocating tasks, responsibilities for achieving the goals of each member of the partnership are defined; the allocation must take into consideration the abilities, skills and experience of each person. Often, if the assignment of tasks is generic, or worse if a certain task is no one's responsibility, then there are serious problems in project management and critical issues that can even compromise outcomes. It is preferable, when assigning tasks, for there to be clarity in what is expected from the execution of the task (if this clarity is not there, it means that the level of detail of the task specification will have to be increased).

4. State the time frame. The time sequence indicates in what order the activities are to be performed, the division of responsibilities, and the interdependencies between the activities. Specifying time frames means making a realistic estimate of the duration of each task (it is often not possible to establish these dates with absolute certainty, but it is always good to make assumptions.

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How to design a project: IMPACT

3.1 Impact and ambition

Impact and ambition — Progress beyond the state-of-the-art
Define the short, medium and long-term effects of the project. *Who are the target groups? How will the target groups benefit concretely from the project and what would change for them?* *Does the project aim to trigger change/innovation? If so, describe them and the degree of ambition (progress beyond the status quo/state-of-the-art).*
Insert text

#§IMP-ACT-IA§# #@COM-DIS-VIS-CDV@#

3.2 Communication, dissemination and visibility

Communication, dissemination and visibility of funding
Describe the communication and dissemination activities which are planned in order to promote the activities/results and maximise the impact (to whom, which format, how many, etc.). Clarify how you will reach the target groups, relevant stakeholders, policymakers and the general public and explain the choice of the dissemination channels. *Describe how the visibility of EU funding will be ensured.*
Insert text

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How to design a project: SUSTAINABILITY

3.3 Sustainability and continuation

Sustainability, long-term impact and continuation *Describe the follow-up of the project after the EU funding ends. How will the project impact be ensured and sustained?* *What will need to be done? Which parts of the project should be continued or maintained? How will this be achieved? Which resources will be necessary to continue the project? How will the results be used?* *Are there any possible synergies/complementarities with other (EU funded) activities that can build on the project results?*
Insert text

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How to design a project: IMPLEMENTATION

4.2 Work packages, activities, resources and timing

WORK PACKAGES
Work packages *This section concerns a detailed description of the project activities.* *Group your activities into work packages.* ***A work package means a major sub-division of the project****. For each work package, enter an objective (expected outcome) and list the activities, milestones and deliverables that belong to it. The grouping should be logical and guided by identifiable outputs.* *Projects should normally have a minimum of 2 work packages. WP1 should cover the management and coordination activities (meetings, coordination, project monitoring and evaluation, financial management, progress reports, etc) and all the activities which are cross-cutting and therefore difficult to assign to another specific work package (do not try splitting these activities across different work packages). WP2 and further WPs should be used for the other project activities. You can create as many work packages as needed by copying WP1.* *For very simple projects, it is possible to use a single work package for the entire project (WP1 with the project acronym as WP name).* *Work packages covering financial support to third parties (⚠ only allowed if authorised in the Call document) must describe the conditions for implementing the support (for grants: max amounts per third party; criteria for calculating the exact amounts, types of activity that qualify (closed list), persons/categories of persons to be supported and criteria and procedures for giving support; for prizes: eligibility and award criteria, amount of the prize and payment arrangements).* ⚠ *Enter each activity/milestone/output/outcome/deliverable only once (under one work package).* ⚠ *Ensure consistence with the detailed budget table (if applicable).*

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How to design a project: IMPLEMENTATION

Objectives

List the specific objectives to which the work package is linked.

Activities and division of work (WP description)

Provide a concise overview of the work (planned tasks). Be specific and give a short name and number for each task.

*Show who is participating in each task: Coordinator (COO), Beneficiaries (BEN), Affiliated Entities (AE), Associated Partners (AP), indicating **in bold** the task leader.*

Add information on other participants' involvement in the project e.g. subcontractors, in-kind contributions.

Note:

In-kind contributions: In-kind contributions for free are cost-neutral, i.e. cannot be declared as cost. Please indicate the in-kind contributions that are provided in the context of the work package.

The Coordinator remains fully responsible for the coordination tasks, even if they are delegated to someone else. Coordinator tasks cannot be subcontracted.

If there is subcontracting, please also complete the table below.

Milestones and deliverables (outputs/outcomes)

***Milestones** are control points in the project that help to chart progress (e.g. completion of a key deliverable allowing the next phase of the work to begin). Use them only for major outputs in complex projects, otherwise leave the section empty. Please limit the number of milestones by work package.*

Means of verification are how you intend to prove that a milestone has been reached. If appropriate, you can also refer to indicators.

***Deliverables** are project outputs which are submitted to show project progress (any format). Refer only to major outputs. Do not include minor sub-items, internal working papers, meeting minutes, etc. Limit the number of deliverables to max 10-15 for the entire project. You may be asked to further reduce the number during grant preparation.*

For deliverables such as meetings, events, seminars, trainings, workshops, webinars, conferences, etc., enter each deliverable separately and provide the following in the 'Description' field: invitation, agenda, signed presence list, target group, number of estimated participants, duration of the event, report of the event, training material package, presentations, evaluation report, feedback questionnaire.

For deliverables such as manuals, toolkits, guides, reports, leaflets, brochures, training materials etc., add in the 'Description' field: format (electronic or printed), language(s), approximate number of pages and estimated number of copies of publications (if any).

For each deliverable you will have to indicate a due month by when you commit to upload it in the Portal. The due month of the deliverable cannot be outside the duration of the work package and must be in line with the timeline provided below. Month 1 marks the start of the project and all deadlines should be related to this starting date.

The labels used mean:

- *Public — fully open (⚠ automatically posted online on the Project Results platforms)*
- *Sensitive — limited under the conditions of the Grant Agreement*
- *EU classified — RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision 2015/444. For items classified under other rules (e.g. national or international organisation), please select the equivalent EU classification level.*

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Working Groups: Proposal Simulation

STARTING FROM A NEED YOU HAVE TO BUILD THE PROBLEM TREE AND THEN THE GOAL TREE

BUILD THE LOGICAL FRAMEWORK OF YOUR PROPOSAL

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THE NFP ORGANIZATIONAL MODEL

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