

JANFP4Health Training Module 2 EU4Health Project Design & Management

Lisbon

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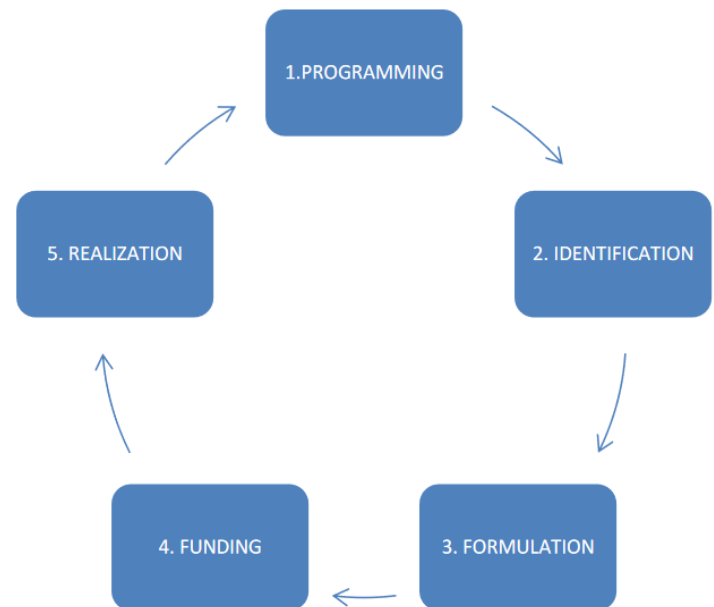
This presentation is part of the action "NFP4Health" which has received funding from the European Union's Health Programme (2014-2020) under grant agreement No 101035965.



The Project Cycle Management

The best-known and most widely used method of project drafting is the **Project Cycle Management-PCM method**.

The PCM breaks down the different phases of a project into a few key steps – Project Stages.



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The Project Cycle Management



The **Project Stages are progressive**: in general, it is not possible to start a phase if the previous one is not completed, some kind of "validation" by the design team and the organization is needed to proceed from one stage to the next.



It is called a **"cycle"** because the **concluding evaluation transfers the experience of newly concluded interventions** into the design of future interventions (feedback, redesign, etc.)



The great advantage of PCM, since it is a cyclical path, is that **it allows continuous verification in the various Project Stages** (well distinguished and defined) from its first formulation and to intervene in the project activity, making changes and/or improvements.



The PCM offers a structure that ensures that **all stakeholders are actively involved** in the project writing and implementation process. All ideas can be evaluated throughout the project cycle. In fact, it is a participatory methodology.



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The PCM Phases

The PCM is not something that is rigid and divorced from context, but rather it is a reference methodology for project management that is possible (indeed, desirable) to adapt to the needs of each context in which it is applied.

The methodology considers the Project Cycle from beginning to end as a set of well-defined but at the same time strongly interrelated actions in a circular sequence. Thus, there is not only randomness between the various stages, but also interaction and interdependence.



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Programming

The first phase of the PCM **is to find out whether the project idea as a whole is consistent with what is stated in the call for proposals.**

The purpose of this stage is also to: (i) identify and agree on the main purposes of the project; (ii) provide an initial idea of what we plan to accomplish, the priorities, and the people we plan to involve.

This is the stage when it is very important to document the guidelines and all past documentation, including past projects already funded on the topic by the European Commission.



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Identification of Project Partners

Partners - and eligible countries - are always detailed within the call. Therefore, it is important to **always read carefully all the information in the call**, including with respect to the countries that may be involved in the project.

Do not forget the "type" (e.g., the characteristics of the entities/organizations that can participate), check the number of partners, etc. It is also necessary to make sure that all chosen partners share the set goals, have an identical understanding of them, and are synergistic in realizing the goals.

A partner's experience is very important, even more so if he or she is the proposing or "lead" partner. In addition, not only are the curriculum and experience of the proposing institution/organizations and partners important, but the figure of the overall coordinator (Project Manager - PM), whose resume should be attached, assumes great importance.

Finding transnational partners is particularly complex if we do not already have European networks with which we collaborate and especially if we are new to the process. It is often the case that the partner search is done a few days before the deadline of the call. Let's not frustrate the project effort with the absence of partners. Let's not forget that the production of formal documentation may require implementation time that we cannot predict.

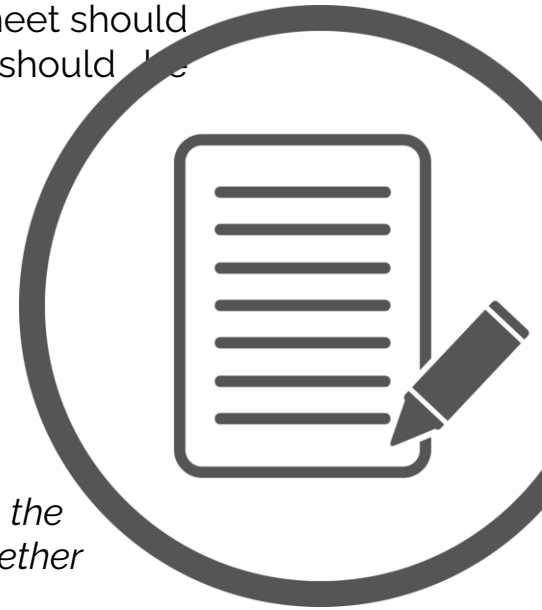


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Identification of Project Partners

For the purposes of searching for partners, as a first step, it is necessary to prepare a project summary sheet (abstract), obviously in English. The summary sheet should be brief and written in simple language. The following points should be highlighted:

- 1. the call name (and program) in which you want to participate*
- 2. the expiration*
- 3. the goals*
- 4. fundable activities*
- 5. the draft activity plan (including the methodology of implementation and expected outcomes)*
- 6. the duration*
- 7. the total cost (highlighting the total co-funding you intend to request from the committee and the total co-funding requested from partners, explaining whether this should be in cash, or in man-hours and rent and equipment, etc.).*
- 8. the type of partners being sought*



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Identification of Project Partners



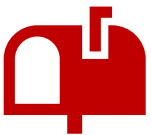
This must be combined with a brief presentation of the entity/organization we represent, again in English. Once the summary is prepared, it is necessary to select the parties with whom you want to activate the project consortium. First, you can start with the European networks to which you belong or turn to your own territorial networks and see if they have contacts with others in Europe.



The websites of the DGs and Agencies, the Funding&Tenders Portal, as well as the information bodies, greatly facilitate the search for partners. Indeed, these tools make it possible to get in touch with numerous actors. For example, one can check whether the DG, which issued the call, has set up a database that lists individuals who wish to apply or participate as partners.



It may also be useful to examine the records of projects funded in past years and see if partner data can be traced from them. An alternative is to conduct targeted searches, via the internet, that allow groups of associations to be selected according to specific themes.



One should not forget, of course, the regional representation offices in Brussels.



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Project Identification

First the context and scenario must be considered. This is because once problems (or needs) are identified, they are considered in relation to the potential and obstacles presented by the context.



At the project identification stage, the Logical Framework is developed, which is the logical structure of the project: a matrix that displays all the essential elements of the project, highlighting their relationships. The Logical Framework (LF) allows for a rigorous identification of the process that leads from the problems (few in number and specific in scope) to be solved, to the identification of goals and outcomes, (again few and specific), and, if well applied, it represents a tool that allows the various actors to participate in the definition of a transparent, as well as logical, itinerary using common concepts and languages.



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Project Formulation

The stage following identification is project formulation, which is the development and drafting of the final text in which all elements of the project are developed in detail.

The final document will be the official text of the project, that is, the one that will be submitted to the European Commission (or the respective funding body).

The final draft text generally consists of:

- (i) *A brief summary of the intervention;*
- (ii) *The detailed description of the project.*

At this stage, it is also good to think in terms of:

- **Feasibility:** that is, verifying that the project, as identified, is doable. Specifically, all internal conditions (consistent with the mission of the proposing organization, resources, people, funding) and external conditions are analyzed, i.e., all those conditions that, while seemingly unrelated to the project, may in some way impede its proper implementation or make it difficult to achieve the identified goals.
- **Ex ante evaluation:** the evaluation carried out at this point in the project cycle aims to preliminarily evaluate, and with strong effort at abstraction, the project as formulated. In this way, it is possible already at the formulation stage to correct those aspects that are most likely to jeopardize the implementation of the project itself (e.g., the goals are well specified and consistent with the scenario analysis, the planned actions are linked to the goals, etc.)



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Funding

Once ready, the project text is submitted to the European Commission/funding body to apply for a grant for implementation. The project is then analyzed and, finally, the funding agency will make a decision on the approval or rejection of the funding proposal.

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



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Implementation

The implementation stage is when, once funding is obtained, the project is actually implemented.

At this stage, all resources necessary for the implementation of activities are mobilized. The project team (local and international) is also formalized, and the planned activities are validated and scheduled.

Two elements are important in the project implementation phase:

- Project management (financial, personnel, materials, etc.).
- Monitoring, i.e., the constant work of comparison on the progress of the activities carried out (the collection of documentation that allow the identification of possible "distortions" of the project and, therefore, possible solutions so as not to compromise its implementation



Evaluation

Final evaluation: the final evaluation occurs when the project has just finished or has been finished for a short time. In this case, the **goal of the evaluation is the specific goal of the project and, in particular, the degree to which the expected outcomes** have been achieved, in light of the manner in which the planned activities have been completed.

Ex-post evaluation: Ex-post evaluation is conducted after a certain amount of time after the end of the project, a year or a longer time depending on the complexity of the project. This is referred to as **impact evaluation**, and *this is the type of evaluation that allows a judgment to be made about the degree to which the overall goal has been achieved.*



THE NFP ORGANIZATIONAL MODEL



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