
E-MANUAL

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

2.1 THE BASIC ELEMENTS OF THE PROJECT MANAGEMENT

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.

However, it is important to know that the idea must be **consistent with the strategies and policy priorities given by the European Commission**. Therefore, it is absolutely essential to be familiar with:

- 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 and all documents cited in the call document
- other projects already funded in the thematic area and specifically in that relevant call

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

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.

BALANCING PARTICIPATING 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.

THE NEED

In explaining the need that the project intends to meet, **it is important to report supporting data, figures and appropriate studies** (citing sources) about the need described, or good practices activated, etc.

ANALYSIS OF ALREADY FUNDED EUROPEAN PROJECTS

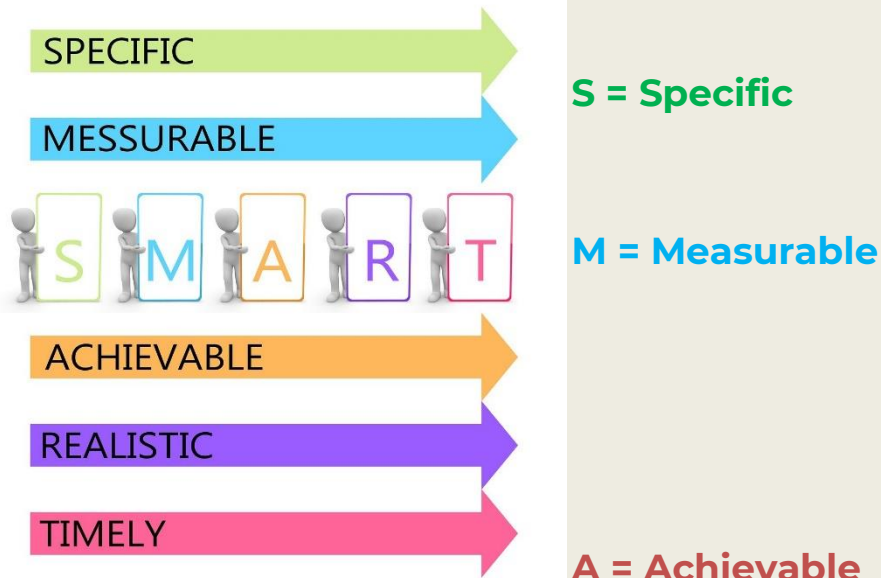
The analysis of already funded European projects is essential for the submission of a winning European project.

This preliminary analysis makes it possible **to identify similar projects that have already been implemented in order 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.*

PREPARATION OF THE DESIGN MATRIX

The term "project" refers to the set of interrelated activities which, starting from a scenario, lead to the achievement of an outcome (with respect to goals) in a given time and with given resources and costs. Initially, it is important to prepare a **project matrix** in order to identify: **a general goal** (responds to the need you want to meet and is aligned with European policies/strategies), **specific goals** (which refer to the priorities of the call), **expected outcomes, verification tools, implementation timeframe** (while respecting the indications of the call), **economic and/or human resources defined** (respecting the possibilities of expenditure of the call), **activities to be carried out** (aligned with the specific goals to be achieved and which are sometimes "suggested" by the call), **methodology** (it is important to refer to the "recognized-validated" models), **intermediate and final evaluation** (internal: monitoring of activities and verification of achievement of goals; external: evaluation of the project process and verification of impact in the target context), **communication and dissemination** (current means of communication allow us to be really effective in building a communication plan: websites, newsletters, social networks, videos, etc.), **management** (demonstrate the coordinator's leadership skills and past experience), ability to activate strong "shared" coordination with project partners (Coordination board). Some tools such as the "Logical Framework" can be used to build part of this matrix.

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**. In this method, specific goals are defined and then the activities necessary to achieve them are indicated accordingly. To determine whether the goals are valid, five criteria were defined, corresponding to the acronym S.M.A.R.T.



R = Realistic (result-oriented)

T = Time-Based

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.

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.

OUTCOMES AND THEIR DISSEMINATION

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). Therefore, it is recommended that all material produced be computerized. And, of course, in the European context, it is always essential to provide for their translation into multiple languages

so that they are "disseminated" in the various partner countries. The English language, in itself, already allows for distribution to all member states (as one of the official languages).

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.

Dissemination needs to be carried out for as many possible users as possible, thus not only for the European Commission or for those who funded the project but also for other



organizations that may be interested in what was achieved during the project, to other practitioners, and even to a wider audience, such as European citizens.

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.