



# EU Project Planning and Management Handbook

**Nordic Matchmaking Event for International Projects 16-17.11.2022**

Vitality for Lapland by International RDI competence -KATOS project

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# Background

- KATOS project - Vitality for Lapland by International RDI competence (2020-2022)
- International (EU) Project Management pilot training program 15 ECTS
- ~ 30 Participants from Lapland in Finland: municipal and regional developers, teachers, RDI specialists
- Entire cycle of EU project planning with emphasis on practical tools for project planning and implementation
- 20+ years of experience in the field and feedback from students – a request for a more **practical, easy to use** roadmap to EU projects

**Practical...**

**Easy to use...**

Roadmap to EU projects



# How to use?

- Based on PCM/LFA by EC
- Adapted to **applicant's** project cycle
- 48 pages
- EU Project Partnerships
- EU Funding Instruments
- EU Project Planning Process and Tools
  - Identification
  - Formulation
  - Implementation
  - Evaluation

## Applicant's Project Cycle

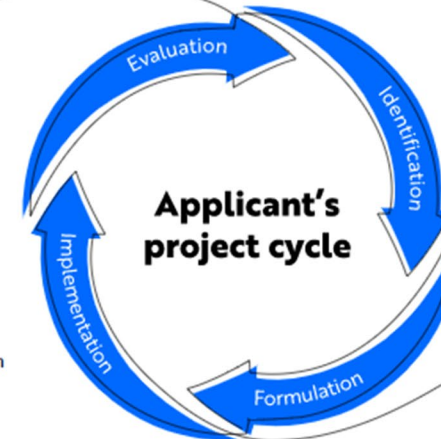
An overview of the stages of the project cycle with steps and tools from the applicant's point of view.

### 4. Evaluation

- Audit
- Evaluation
- Measuring efficiency
- Possible new projects

### 3. Implementation

- Contract with European Commission and partners
- Updated workplan
- Communication and dissemination plan
- Monitoring and evaluation plan
- Actual work on implementation
- Progress monitoring
- Dissemination
- Reporting



### 1. Identification

- Problem analysis: problem tree
- Objective analysis: objective tree
- Strategy selection
- Stakeholder analysis
- Project concept note
- Consortium building
- MoU and Non-Disclosure agreement

### 2. Formulation

- Logical Framework LF
- Work breakdown structure
- Gantt chart schedule
- Resource plan and budget
- Project plan and application

Figure 1. Applicant's project cycle



# Framework for collaboration

- Key steps to take
- Key tools to use
- Key outcome of each step
- Key decisions for each step

## KEY STEPS

## OUTCOME

## DECISIONS OR CONCLUSION

<p><b>Logical Framework Approach</b></p> <ul style="list-style-type: none"> <li>• Use objective tree and project strategy branch to start building the Logframe</li> <li>• Define the hierarchy of objectives               <ul style="list-style-type: none"> <li>• Overall objective</li> <li>• Specific objective</li> <li>• Expected results</li> <li>• Core activities to reach objectives</li> </ul> </li> <li>• Add to each objective specific and measurable indicators of achievement, and expected sources of verification</li> <li>• Define the risks</li> </ul>	<p><b>Logical Framework Matrix</b></p>	<p><b>Clearly defined goals on four levels</b></p> <ol style="list-style-type: none"> <li>1. Overall objective (long term goal)</li> <li>2. Specific objective</li> <li>3. Expected results 3–5</li> <li>4. Key activities for each expected result</li> </ol>
<p><b>Work Packages (WP) and Workbreakdown (WBS) structure</b></p> <ul style="list-style-type: none"> <li>• Select the core results from the Logframe and core activities for each result</li> <li>• Form a work package under each result</li> <li>• Break activities down into more specific and manageable tasks</li> </ul>	<p><b>WBS diagram</b></p>	<p>3-5 work packages with detailed sets of tasks to be performed to achieve the project result.</p>
<p><b>Workplan</b></p> <p>Create a breakdown of implementation work packages, tasks and activities with specifically defined deliverables at each stage.</p>	<p><b>Workplan</b></p>	<p>Workplan for each milestone with</p> <ul style="list-style-type: none"> <li>• key action steps</li> <li>• timeline</li> <li>• expected outcome</li> <li>• source of verification</li> <li>• responsible person/s</li> </ul>
<p><b>Scheduling activities (Gantt Chart)</b></p> <ul style="list-style-type: none"> <li>• Use WBS and add all activities in sequence for each WP</li> <li>• Define how much time is needed to complete each task</li> <li>• Define dependencies of activities and tasks</li> <li>• Define the milestones and core deliverables</li> </ul>	<p><b>Project schedule in Gantt chart</b></p>	<p>Timeline for all activities</p>

Available online and printed  
[www.kv-projektiosaaminen.fi](http://www.kv-projektiosaaminen.fi) -> Handbook

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Based on Project Cycle  
Management (PCM)

[https://issuu.com/lapinamk/  
docs/d\\_13\\_2022\\_handbook-](https://issuu.com/lapinamk/docs/d_13_2022_handbook-)

EU project is a joint effort –  
let's make it happen!