



Welcome to the Generativity training modules.

The project “Generativity – manage it!” has been funded with support from the European Commission under the Erasmus+ program Cooperation for innovation and the exchange of good practices, Strategic Partnerships for adult education.

The partnership is composed by: FEANTSA (Belgium) as applicant, Diciannove (Italy), Danmar Computers (Poland), European Evaluation Company (UK), Cardet (Cyprus), KEA and the University of Thessaly (Greece), FNARS (France), and FIOpsd (Italy).

Training module slides are composed of two parts: the body (focusing on key-points) and associated notes (which give more details, explanations and tips).

The body of the slides is in English because it is important to become familiar with the terminology and glossary from the perspective of an EU commission official; English is the more common language between applicants.

The slide notes are translated into partner languages to provide a more effective understanding of the major points in the slides.

This training set is a series of five modules and its purpose is to give an overview to European citizens on how to succeed with EU funding. The training is provided under the Generativity project, funded by Erasmus+.

Module 0 provides an introduction to the Generativity project and to the essentials of Project Cycle Management (PCM) which is being used as an essential tool for EU project management success.

The first module of the training set explores issues concerning ways of selecting an appropriate EU funding programme.

Module two provides information on how to structure an innovative and sustainable project idea.

In module three we will learn how to build partnerships.

In module four we will find out about proposal submission procedures.

Finally, module five explores issues facing the partnership when running a successful project after an application has been accepted.



Module 0

Introduction to Generativity

This “Module 0 – Things to know when applying for EU funds” provides an introduction to the Generativity modules. It gives an overview of the main topics of the training on Project Cycle Management.

The Generativity modules



0 - Introduction to Generativity

- ✓ *PCM origins, principles, main approach*
- ✓ *from PCM to structuring a project idea*



1 - Financial & programmatic priorities of the EU2020 strategy within various programs

- ✓ *areas & priorities for the 7 years mandate*
- ✓ *structural funds & funds for direct delivery*
- ✓ *matrix of opportunities available in the 2014-2020 program*



2 - How to structure an innovative and sustainable project idea

- ✓ *analysis of the logical structure of the project intervention*
- ✓ *project cycle management*
- ✓ *process from need analysis to SWOT matrix*
- ✓ *design of the objectives under the SMART matrix*
- ✓ *develop a project idea: innovative, sustainable, effective*

The Generativity project developed a set of six modules.

This is the first module (module 0) and it introduces you to the Generativity project, to Project Cycle Management (PCM), and developing a project idea through the PCM approach.

The contents of the other modules are:

Module 1 considers financial and operational priorities of the EU2020 strategy and how these need to be developed within a product idea and application.

Module 2 then considers how to structure an innovative and sustainable project idea that should lead to a successful application.

The Generativity modules



3 - Building an international, national, local partnership

- ✓ *what is a partnership*
- ✓ *building and effective partnership*
- ✓ *finding good partners*
- ✓ *partner communication and collaboration*
- ✓ *IT tools for project management*



4 - Submission procedures according to the guidelines of the European Commission

- ✓ *forms & attachments*
- ✓ *document preparation*



5 - Implementation, evaluation, valorisation, dissemination, exploitation of project results

- ✓ *implementation, dissemination, valorisation, communicative strategies*
- ✓ *administrative & financial management*
- ✓ *eligibility criteria of the cost items for the construction of the estimated budget*
- ✓ *direct costs, indirect costs, other costs, subcontracting*
- ✓ *how to navigate between the different forms of financing*
- ✓ *tools for monitoring / evaluation of activities & results*



Module 3 looks at issues surrounding building and sustaining a partnership to take the project forward, including national, international and local partners.

Module 4 deals with the many rules and regulations you are likely to face when making your submission

Finally, module 5 considers implementation of the project itself, developing it and ensuring that it stays on track with what was promised, sustaining it and helping the community to exploit its achievements.

Introduction to Generativity



...what is it all about ?

“Generativity: manage it!” is a project funded by the Erasmus+ KA2 Learning Partnership.

It responds to some questions that arise in most third sector organizations: the need to acquire, develop & implement skills and competences on Project Cycle Management.

The term was coined in 1950 by Erik Erikson to denote a concern for establishing and guiding: in Erikson’s “Stages of Psychosocial Development”, generativity is defined as a struggle against stagnation that ascends during adulthood, when a process of guidance left the place for a process of guiding the next generations.

The partners of the project share their competences and skills to respond to such needs and to foster new generativity.

“Generativity: manage it!” consists of an online platform (IO1); five training modules (IO2), which have been tested during a 5 days short term training staff event (LTTA); the online tutorials on PCM (IO3); a dedicated bibliography on PCM

This module introduces the culture of PCM. For specific themes, please refer to the dedicated module.

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“Generativity: manage it!” is a project that responds to some of the questions that arise in most of the third sector organizations in various fields: the need to acquire, develop and implement skills and competences on Project Cycle Management.

“Generativity: manage it!” offers an approach to acquire these skills and create, generate, implement or produce new effective and sustainable services.

As a project Generativity aims to share skills and knowledge on writing, submitting and implementing effective and sustainable projects. Its platform provides a bibliography, these very training modules on PCM (Project Cycle Management), tutorials, and updates on new calls.

In the training modules there will be space for contents, explanation and tips.

Our aim is to share our competences, and so foster new generativity

What is a project?

a series of activities aimed at bringing about clearly specified objectives within a defined time-period and a given budget

a temporary collection of related tasks to achieve the desired and unique results

has limited resources, involves an element of risk as it entails a level of uncertainty and it is unique by nature



Projects can vary significantly in their objectives, scope and scale. Smaller projects might involve modest financial resources and last only a few months, whereas a large project might involve many millions of Euro and last for many years.

A well-formulated project should derive from an appropriate balance between the EU's policy priorities and the partner's priorities.

Key elements of a project

Clearly identified stakeholders, including the primary target group and the final beneficiaries

Clearly defined coordination, management and financing arrangements;

A monitoring and evaluation system (to support performance management);

An appropriate level of financial and economic analysis, which indicates that the project's benefits will exceed its costs.



In order to accommodate a huge kind of project diversity, it is important that project cycle management systems support the application of standard working modalities and rules in a flexible manner.

Building, designing and implementing a project may be a complex process – but it is a process that contains a certain degree of inner simplicity.

For example, how complex and simple it can be to organise a dinner with friends: you need to know well who you want to eat with (considering some people might be invited but not accept the invitation); you have to set an appropriate menu; you have to plan, organize and manage the shopping to be efficient and not time-consuming; you need to apply and implement your cooking skills. You finally eat and see the results in terms of good atmosphere.

All the key-elements of a project are in here.

PCM origins, principles, main approach



Project Cycle Management (PCM) - 1

Project Cycle Management (PCM) is an approach to manage multiple projects or programmes and to improve the quality of projects by learning from one project and applying the lessons in the following ones.

The approach was introduced by the World Bank in the 1980, and spread in the 90s, when it was picked up by the European Commission.

Following an evaluation on Aid Efficiency, the EC introduced PCM as its main approach to manage and evaluate development project proposals

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In 1992 the European Commission adopted "Project Cycle Management" (PCM) as its primary set of project design and management tools (based on the Logical Framework Approach), in order to improve the design, management and efficiency of beneficiaries' support.

The underlying idea behind PCM is to set up, from the beginning, proposals that include the real needs (problems) of the beneficiaries of the interventions.

Project Cycle Management (PCM) - 2

AIMS

- improve the design and project management quality
- foster a systematic integration of all project phases
- harmonize all project activities into a process-oriented framework
- focus on the actual needs of the beneficiaries, stakeholders and target groups
- introduce a logical and pragmatical approach to counteract the main causes of design failure

PRINCIPLES

- include, orient and involve partners, stakeholders and possibly target groups
- focus on the sustainability of the project in the middle-long term
- ensure lasting benefits
- develop an analytical approach through the use of the Logical Framework
- integrate project objectives within the sectoral and horizontal objectives of Eu programs and with local and national ones

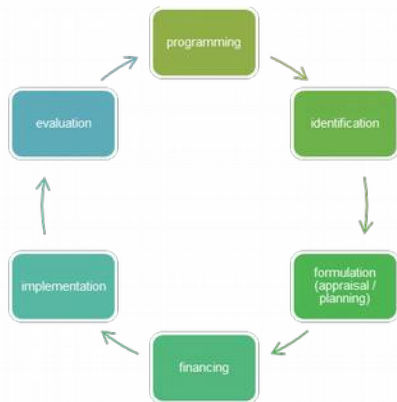
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Project Cycle Management (PCM) is a term used to describe the management activities and decision-making procedures used during the life-cycle of a project (including key tasks, roles and responsibilities, key documents and decision options).

PCM involves the negotiation of decisions acceptable to key stakeholder groups. Teamwork, negotiation and communication skills are thus central to effective PCM, as is an appreciation of the political context within which decisions are being made.

PCM provides an overall analytical and decision making framework, which must nevertheless be complemented by the application of other specific 'technical' and 'process' tools.

PCM six phases



All phases are progressive and cyclic, each phase is preparatory to the next one key decisions, information requirements and responsibilities are defined at each phase programming draws on evaluation to build experience as part of the institutional learning process.

The PCM consists of six progressive phases: each phase leads to the next one and is therefore a lifelong cyclical process of continuous renewal and improvement.

Definition of PCM six phases

Programming: the context is analysed to identify problems, opportunities and impediments that could be addressed in the implementation of the project	→	<i>what are the partners development priorities? what is the EC focus? what are the pros and cons in the context?</i>
Identification: identify and analyse the possible actions to be taken, project ideas are formulated	→	<i>is the concept relevant to local needs and consistent with EC policy priority?</i>
Formulation: the perceived project ideas are elaborated in plans of operational projects	→	<i>is the project feasible and will it deliver sustainable benefits? is the project based on a</i>
Financing: proposals are examined by authorities who decide whether or not to fund the project	→	<i>precise and effective cost-analysis? are results being achieved?</i>
Implementation: the project is implemented within the given gantt-chart, following the given distribution of tasks and activities; it is constantly monitored	→	<i>are resources efficiently used? is there a corrective strategy? Are results, benefits and</i>
Evaluation: The project is evaluated to determine what objectives have been achieved and to identify useful lessons for the future	→	<i>outputs achieved in the given time? Are they sustainable?</i>

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This cycle highlights three main principles, as the decision making criteria and procedures are defined at each phase (including key information requirements and quality assessment criteria).

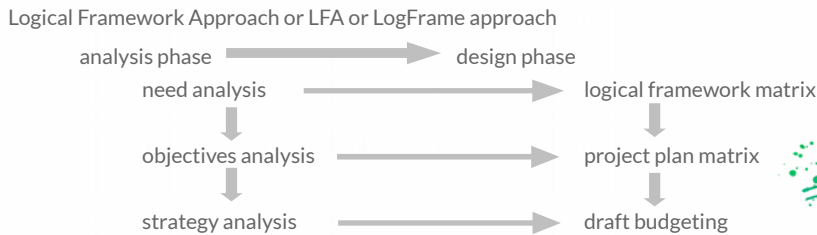
The phases in the cycle are always progressive: each phase should be completed for the next to be tackled with success.

New programming and project identification draws on the results of monitoring and evaluation as part of a structured process of feedback and institutional learning.

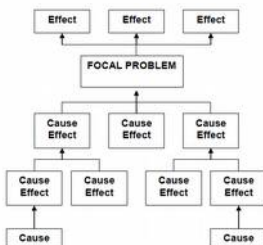
Each phase has a simple definition and it corresponds to simple questions that can make it easier for applicants to check if you are doing things right.

Once this step is given and clearly learnt, it is time to go a bit more into details of practical applications of PCM

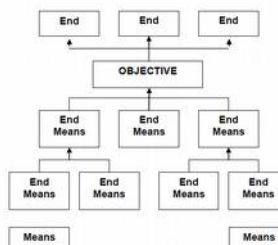
PCM main tools



The Problems Tree



The Objectives Tree



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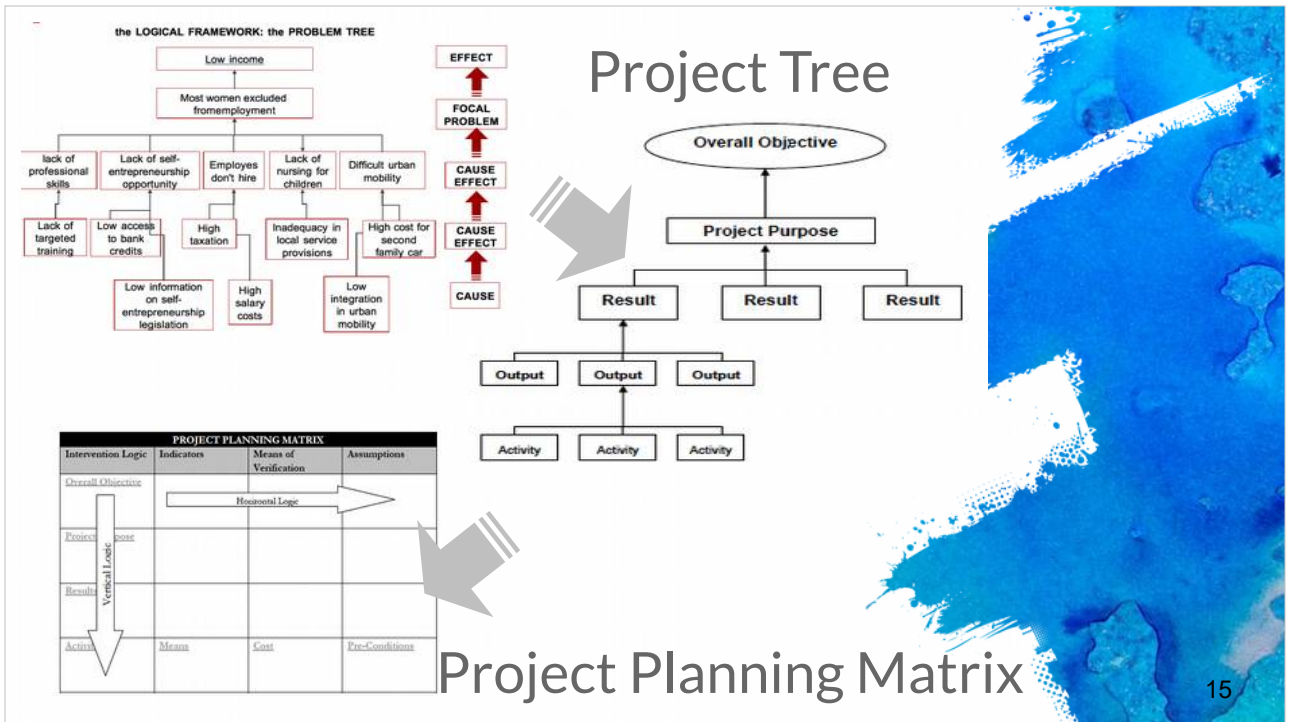
The Logical Framework Approach (LFA) is a core tool used within Project Cycle Management.

It is used during the identification stage to help analyse the existing situation, to investigate the relevance of the proposed project and to identify potential objectives and strategies.

It might sound complex, but it is a logical way to approach the preparatory phase: it supports the preparation of an appropriate project plan with clear objectives, measurable results, a risk management strategy and defined levels of management responsibility.

Subsequently in the project/programme implementation, it provides a key management tool to support contracting, operational work planning and monitoring.

Finally at the evaluation and audit stage, the Logframe matrix provides a summary record of what was planned (objectives, indicators and key assumptions), and thus provides a basis for performance and impact assessment.



Problem analysis identifies the negative aspects of an existing situation and establishes the 'cause and effect' relationships between the identified problems.

Tips:

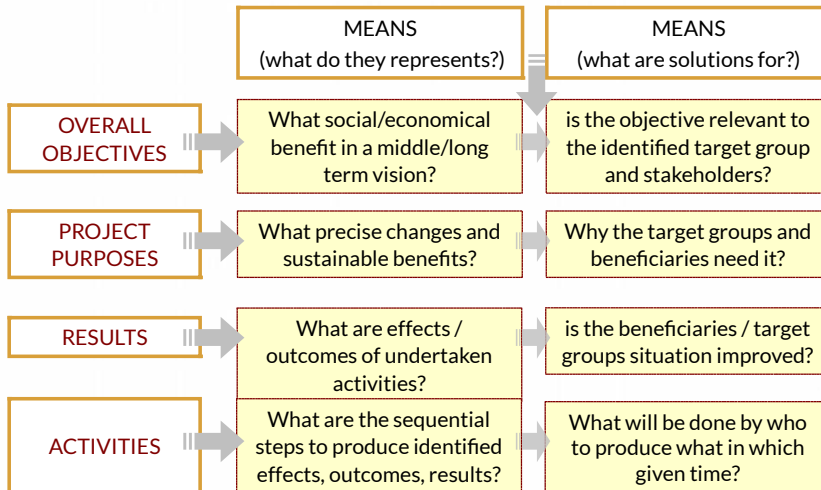
Applicants should start from the definition of the framework and the subject of the analysis (i.e: what are we talking about?)

Then identify what major problems are faced by the target groups and beneficiaries (i.e: what is/are the problem/s? Whose problems?)

Finally, let's visualize the problems in form of a diagram, called a "problem tree" or "hierarchy of problems" to help analyse and clarify the cause-effect relationships.

The analysis is presented in diagrammatic form showing effects of a problem on top and its causes underneath. The analysis is aimed at identifying the real bottlenecks which stakeholders attach high priority to, and which they wish to overcome. A clear problem analysis thus provides a sound foundation on which to develop a set of relevant and focused project objectives.

Logical framework meaning



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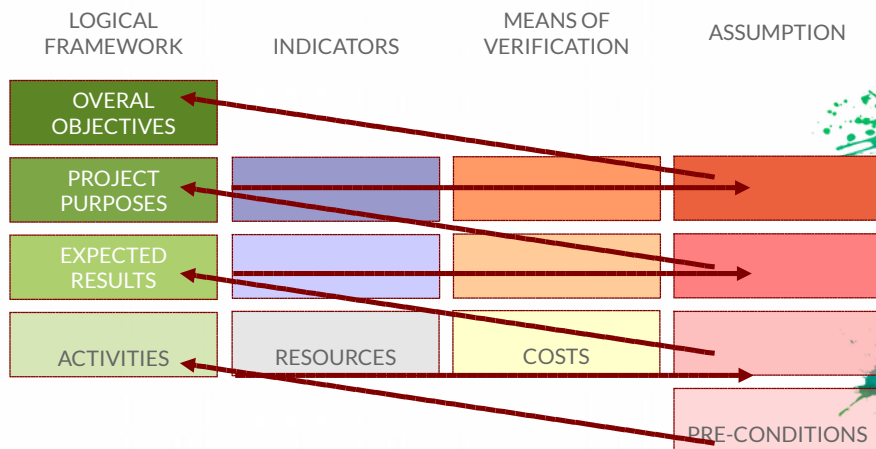
There are various reasons to keep things logical and to set the previous need analysis into a structured framework: one is to keep your points visible, clear and easy to monitor.

During the analysis phase, the existing situation is analysed to develop an image of the "future desired situation" and select the strategies that will be applied to achieve it.

Lately, during the designing phase when the project idea is developed in its operational details, it might be declinable in operational details to ensure the feasibility and sustainability of the project.

Tips: if the project ideas are relevant, they will be the objective of the logical framework

Logical framework structure



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The preparation of a Logframe matrix is an iterative process, not just a linear set of steps. As new parts of the matrix are drafted, information previously assembled needs to be reviewed and, if required, revised.

Nevertheless, there is a general sequence to completing the matrix, which starts with the project description (top down), then the assumptions (bottom-up), followed by the indicators and then sources of verification (working across).

Tips: when the Logframe has been filled in, recheck it; if it is logical. the objectives are stated clearly and logically linked to the objective on the next level up. All key assumptions have been made and the project is likely to be successful.

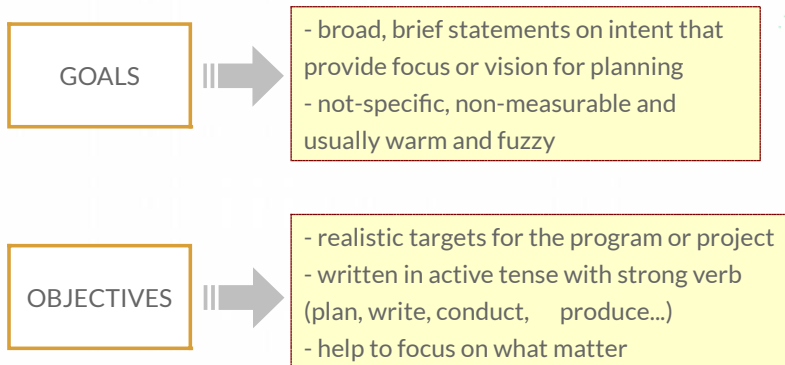
The indicators and evidence are reliable and accessible; they can measure the progress and impact of the objectives.

The activities include actions needed for gathering evidence.

The indicators and evidence can be used for monitoring and evaluation.

Goals and objectives

The difference between goals and objectives can be confusing, so it is important to have it clear from the beginning



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This is a basic lesson to be learnt very clearly

If applicants don't see what the objectives are and what they are not, then the whole process will be ruined.

We suggest to keep it as simple as possible.

A goal is general ambition, like "peace on earth" or "feed the world".

The objectives are realistic/concrete strategies to achieve the goal: who is doing what, when, why and to what standards.

But they are not activities, nor are they simple «visions».

And there should not be too many.

S.M.A.R.T. Objective matrix

S pecific	⇒ What are we going to do?	⇒ Products and outcomes are clearly addressed and defined
M easurable	⇒ How do we measure / consider what we do?	⇒ Every activity is measurable and verifiable at certain level
A chievable	⇒ Is the external context favorable?	⇒ Objectives and expectations are realistic
R elevant	⇒ Does the achievements of objectives lead to expected results?	⇒ Products, results and outputs are relevant for the partners
T imeframed	⇒ When are we going to make it?	⇒ a gantt-chart identifies distribution of tasks between partners & across time

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Basically no one would like to do something useless and stupid. As we mostly like to be smart, so do the objectives.

They should be “Specific” and reflect what the project intends to change (include the specific target population group and the change you want to achieve for them).

They should be “Measurable”, precisely defined, avoiding ambiguity in measurement and interpretation.

They should be “Achievable”, meaning it is verified that it is indeed possible to accomplish the specified quantities (how much/how many) and end results (what/for whom).

They should be “Relevant” and address real priority, needs, problems

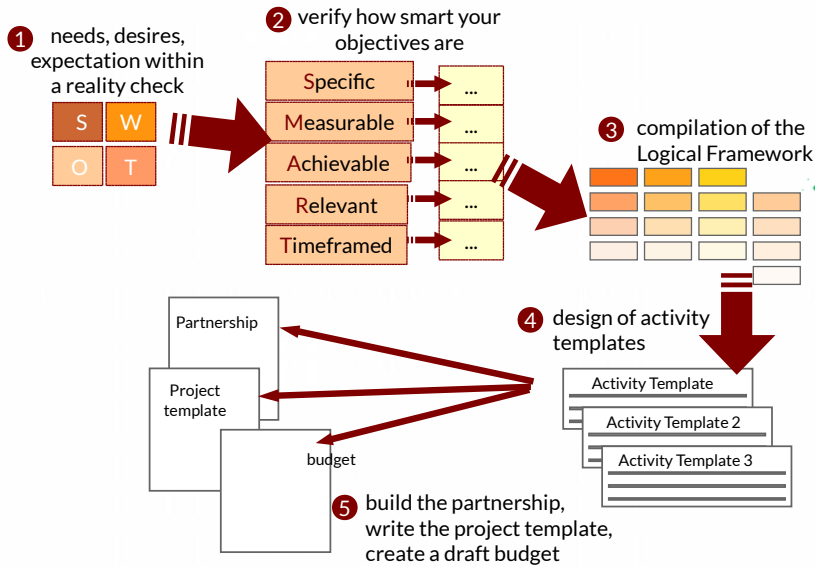
They should be “Time-framed” to determine “when” a certain change is expected.

If just one of these conditions is not satisfied, the objective you are thinking is not smart

From PCM to structuring a project idea



From PCM to project structure



After Logical Framework definition, a further step adds operational details to the project design: drawing up of activity tables and expenditure schedule.

Activity Tables and Expenditure schedule are two tools that derive from activities reported in the Logical Framework and provide a direct link between design details and project objectives.

Checklist for an Activity Table

List of Main Activities

The activities described in the Logical Framework are used as a basis for identifying all operational details

Division of each activity into Operational Tasks: tasks are dropped into sub-tasks and each assignment is assigned to an individual

Make sequence and interdependence clear: the tasks are related to each other in order to define sequence and interdependence

Make an estimate of the start, duration, and performance of the activities: a realistic estimate of the duration of each task is made to determine probable start and end dates

Summarize the Activity Table: a summary table of start times, duration, and task completion is created

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An activity table is a format for analysing and graphically presenting project activities.

It helps to identify their logical sequence, expected duration and any dependencies that exist between activities, and provides a basis for allocating management responsibility and operational tasks.

The list of assets is also used to calculate all the necessary resources (human, financial and material).

Each activity should be used as a checklist to ensure that the resources required to carry out the activities have been calculated.

Tips: we suggest to follow the list during the preparation and the implementation, and to double-check it for monitoring and evaluation

Define Goals ||▸ Goals are set (dates for the completion of each activity)

Define Skills ||▸ Specifies the type of skills needed to accomplish individual tasks

Assign Tasks to Team Members ||▸ Responsibilities for achieving the goals are defined

All information processed in the Activity Table can be summarized in the Gantt graphic format

For the overall picture of the Project it is appropriate to present a quarterly or monthly presentation, while for a detail on individual activities it is advisable to have a weekly format

Budget ||▸ The list of Logical Framework activities must be copied to a new table: that of expenditure based on which the budget is defined

An activity table is used to determine who will do what and when it will happen.

It defines what types of inputs will be needed, and what contribution the activity will make to the outputs, outcomes and impact.

The activity table helps to consider when an activity will happen and for how long, and how many resources are allocated in term of staff, working days, requirements for exceptional costs, mobilities.

This defines the draft budget.

Tips: it is important to draft a budget for the project at this stage, and not before, in order to maintain the project effective and sustainable.

Checklist

- Specify the required resources
- Enter resources into your spending categories
- Specify units and quantities
- Evaluate unit costs
- Identify sources of funding
- Assign spending codes
- Scheduling costs per period
- Calculate the total
- Estimate the costs to sustain

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Once the activity table is complete, it is possible to define the resources required to carry out each single activity.

This process can produce modifications to the Gantt chart in term of timing, dependency and responsibility, in particular linked to the availability of resources which relate to staff, costs, tools, equipment.

A budget is necessary for transparent financial management.

Resource planning is used to help to consider many aspects, such as what types of inputs, besides people, will be needed and when how much.

Other basic aspect are the total cost of the project, which defines the planning exercise. It should be clear what are the requirements in terms of budget, inputs and the timing of the activity

The cash flow required to ensure the activities takes place and design the roles and responsibilities

The analysis of problems

identification and analysis of main problems, the socio-economic and policy context

identification of the actors involved (with clear contributions and expectations)

INTERNAL ELEMENTS <i>structural to the organisation</i>	STRENGTHS <ul style="list-style-type: none">- what you can do well- previous experiences and knowledge- competences and skills- quality and references- availability of internal resources- geographical positioning- flexibility and transferability- exploitation and dissemination- cost/benefit analysis	WEAKNESS <ul style="list-style-type: none">- where can be improve- low experience- lack of key skilled staff- low or selfish-network- weak leadership and management- unfavorable geography- structural rigidity- low motivation- financial weakness
EXTERNAL ELEMENTS <i>belonging to to the context</i>	OPPORTUNITIES <ul style="list-style-type: none">- strategic position on the market- diverse fields of intervention- develop new products and services- optimise cost/benefit range- staff empowerment- openness to innovation	THREATS <ul style="list-style-type: none">- change in the context- decrease of the target groups- increase competition- increment of investments- more mobility of skilled personnels- development of technology

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The SWOT analysis (strengths, weaknesses, opportunities and threats) is used to analyse the internal strengths and weaknesses of an organization and the external opportunities and threats that it faces.

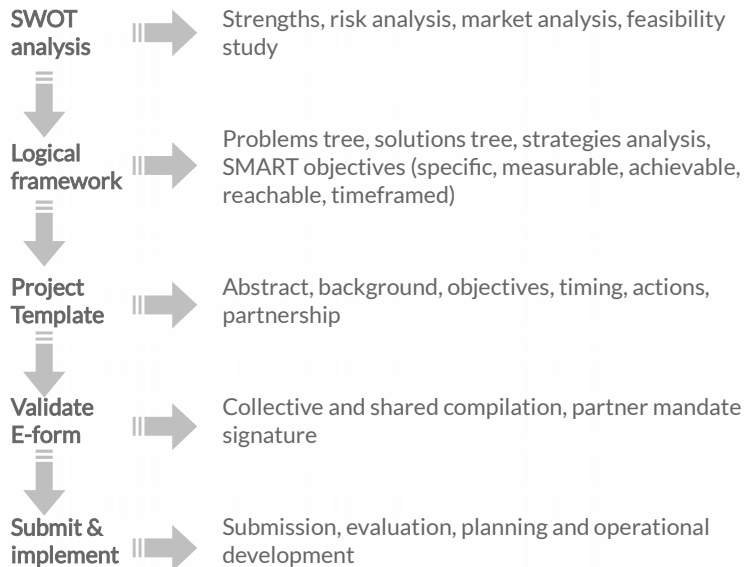
It is easier to do it than to explain it.

Ideas are generated about the internal strengths and weaknesses of a group or organization, and the external opportunities and threats.

The situation is analysed by looking for ways in which the group/organisation's strengths can be built on to overcome identified weaknesses, and opportunities can be taken to minimize threats.

A strategy for making improvements is formulated; then subsequently it will be developed using a number of additional analytical planning tools.

Project designing



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There are some key points we suggest to remember when designing a project.

It should include monitoring (continual) and reviewing (specific phases) in the activity planning worksheet.

It is important to think about who will collect the evidence for the indicators and who will analyse them.

Also you will need to identify who will be responsible for making decisions for changing the project design as a result of lessons learned. Ensure that the stakeholders are involved in this process.

If the information gathered during project identification and research is not enough to give baseline data for the indicators that have been identified, a baseline survey should be carried out before project implementation starts.

This means that there will be data to compare progress.

Project template

TITLE
NEED ANALYSIS (ex ante) + BACKGROUND info
BENEFICIARIES
ON-GOING BENEFICIARIES + END-USERS
TARGET GROUP (possibly more than one & different)
PROJECT PROPOSAL
AIMS
OBJECTIVES (process, specific, SMART)
ACTIVITIES
EXPECTED RESULTS
EVALUATION
TIMEFRAME, GANTT CHART, CALENDAR
BUDGET, CO-FINANCING, SUBCONTRACT
AOB + contract details

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The project template allows for a complete project to be represented in a clear and inter-related manner.

The project template supports ease of understanding and sets the basis for Project Cycle Management to occur and a way of presenting the substance of an intervention in a comprehensive form.

The project template is a product of the Logical Framework matrix and includes all the relevant fields which have to be developed in order to plan an effective and sustainable project.

How to find a good partnership

DEFINITION	⇒	written definition of partner requirements in terms of experience, management, curricula, skills, accessibility to networks, lobbying ability, financial capacity
TIPOLOGY	⇒	Identify an exact type of organization (public/private, large/small, service provider/lobbying agency, same/different sector)
ORIENTATION	⇒	Geography, Policy Orientation, Institutional ...
GEOGRAFICAL POSITION	⇒	Fair and wide partner distribution, ease in travelling, preferably at low cost
PARTNER TEMPLATE	⇒	Partners know about the others from their partner template
FINANCIAL RESOURCES	⇒	Enough financial resources for a preparatory partners meeting/study visit
PROPER SEARCHING	⇒	Consider the kind of network and/or contacts used for searching
CONTACT E-MAIL	⇒	Adequate, punctual and accurate replies to contact emails
DECISION-MAKING	⇒	Immediately definition of contact and decision-making processes
DEADLINES	⇒	Clear definition and respect of the deadlines
ACHIEVE EFFECTIVE RESULTS	⇒	Implementation of partnership-based project and a project of transnational cooperation, is more difficult than when the project is implemented by a single organization alone. However, in return the project can generate unique experiences, broaden perspectives, achieve better and more effective results

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Building a proper partnerships is another key aspect.

The applicant is the partner organisation which will submit and coordinate the whole project.

Partners are the participating organisations which will be involved in the project but do not actually apply for it.

Partners participate in designing and implementing the actions, and the costs they incur are eligible in the same way as those incurred by the grant beneficiary.

It is important to realise that all partners are equally responsible for the successful project outcome; a failure of one partner could jeopardise the success of the whole project so effective management is crucial.

Partners must therefore satisfy the eligibility criteria as applicable to the grant beneficiary himself, in addition to any other criteria affecting partners.

How to build a good partnership

BASICS	⇒	The partnership is based on the project implementation
MANDATE DEFINITION	⇒	The clear definition of the mandate letter, which partners have to sign before applying, contributes to the entire path successful
COMMON INTERESTS	⇒	Clear identification of common interests
PARALLEL ACTION PLAN	⇒	Parallel action plans development for achieving project goals
MUTUAL EXCHANGE	⇒	Foster advices exchange between partners, reply promptly and enlarge the mutual communication exchange of feedbacks
CLEAR MANAGEMENT	⇒	Be clear at every step of the project, such as the implementation and management of the project, the administration and financial management
MUTUALITY RULES	⇒	Establish as soon as possible mutuality rules with regard to decision-making, responsibility, disputes management
CONDIVISION	⇒	Promote free and clear condivision of skills and experiences in order to foster all participants empowerment

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Partnership is an agreement between a group of participating organisations in different Programme Countries in order to carry out joint European activities or establishing a formal or informal network in a relevant field between local and regional authorities to foster inter-regional, including cross-border, cooperation.

It may be extended to institutions and/or organisations from Partner Countries with a view to strengthening the quality of the partnership.

Some projects might include so-called silent partners: these are organisation who are not directly involved in the work, and cannot receive any kind of funds. They might be part of the referring stakeholders, and can maximize the dissemination and valorisation of the project outputs.



diciannove



Generativity
Manage it!



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The next module (Module 1) considers the financial and operational priorities of the EU2020 strategy and how these need to be developed within a product idea and application.