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Scheduling Project Activities

Introduction

**Project planning** is the process of quantifying the amount of time and type and size of inputs (human and economic resources) for a project. The output of the project planning process is an **activity plan** that a project manager can use to track the project’s progress to achieve results. Therefore the project plan forms the basis for all management efforts associated with the project. In the intervention logic of the logical framework the activity plans permits to measure the efficiency of the project.

During the formulation of the project Proposal, a list of main activities is presented in the matrix of the Logical Framework, their scheduling is detailed in the activity plan and their in-depth explanation (with identification of responsibilities) is available in Part 2 the Grant Application Form (GAF): “Description of the Project”.

As soon as the implementation phase of your project starts, it is fundamental to carry out a **detailed activity scheduling**, based on the above mentioned documents.

**Detailed activity scheduling** means determining the sequence and the dependency of activities, estimating their duration and assigning responsibility and tasks.

Therefore, the action of scheduling activities is related with 3 key elements:

- The logical framework
- Responsibilities between Partners
- Ability to define priorities and dependencies

To ensure a consistent and transparent scheduling of activities to be carried out by the partnership, we suggest to make an extensive use of conference calls (e.g. via video conference with VoIP systems such as “Skype”) to facilitate exchange of ideas between project Partners or – which is advisable – to dedicate a special moment during your project kick-off meeting.

Scheduling activities step by step

**Step 1 - List the Activities**

If the **Logical Framework** matrix included in the project is complete enough, the activities identified in it represent a summary of what the project must do in order to deliver project results and it is then possible to further develop aspects like timing, dependency and responsibility using the preferred activity scheduling format (or Gantt chart).

Please note that if a work package approach has been chosen in designing the project, the main activities identified through the Logical Framework table should correspond to
the tasks listed in the work packages and to the ones listed in the **Action Plan** included in the Description of the project annexed to the Grant Contract.

Starting from the detailed Action Plan, the Activities for the on-going year may be specified more in detail (e.g. at monthly and weekly level of their expected timing). The subsequent years can be left at a less detailed level (to within a month or a quarter).

When planning project activities, the partnership must be aware of the rules concerning the **location of activities**.

As a rule projects activities must take place in one or more of the **eligible regions**.

Project activities can take place in **adjoining regions** in case of participation of Partners from those areas, provided that the activities are necessary for the success of the project and for the benefit of the Programme area.

Participation in activities organised outside the area concerned by the project but included in the list of eligible regions of the Programme is allowed.

The planning of activities (e.g. seminars, conferences, etc.) which take place outside the Programme eligible regions is not allowed. In case such activities have been planned and described in Part 2 of the Full Application Form (“Description of the Project”) the relevant paragraph will be deleted or modified during the negotiation process.

A special case is the participation in **events organised by third parties outside the Programme eligible area**, where the location of the event is something the Beneficiary and Partners cannot influence (e.g. an annual event organised by the European Commission in Brussels). In this case, as long as the participation in such events (seminars, trainings, conferences, study trips, etc.) is relevant to the rationale of the project and is **essential to achieve its objectives**, it could be considered as eligible for financing. The participation will however have to be duly justified.

**Step 2 - Break Activities Down into Manageable Tasks**

The list of **activities** included in the “Description of the Project” should be broken down into **sub-activities or tasks**, so that they are sufficiently simple to be easily organised and managed. The technique is to break down an **activity** into its **sub-activities**, and then to take each **sub-activity** and break it down into its **tasks**. Each of these tasks will be assigned to an individual or a team within the partnership and it will become their short-term goal (see Step 8).

It is advisable to avoid breaking down the activities into too much detail: the analysis should stop as soon as the planner has sufficient detail to estimate the **time and**

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1. During the contract negotiation phase, the consistency among all those documents is verified by the Joint Technical Secretariat and the Joint Managing Authority, in order to facilitate the implementation and the monitoring of the project.

2. See Section 3.1.1. of Guidelines for applicants

3. See Section 3.1.2 of Guidelines for applicants
resources required, and the person responsible for actually doing the work has sufficient instructions on what has to be done.

**Step 3 - Clarify Sequence and Identify Dependencies**

Once the Activities have been broken down into sufficient detail, they must be related to each other to determine their:

- **sequence:** in what order should related Activities be undertaken?
- **dependencies:** is the Activity dependent on the start-up or completion of any other Activity?

Dependencies may also occur between otherwise unrelated activities that will be undertaken by the same person or Partner (i.e. the person may not be able to complete both tasks at the same time).

The organization of a seminar, with the support of external speakers can be an example common to many projects financed by the ENPI CBC Programme. The organization of the event can consist of different sub-activities, namely:

- “Speakers”, that can be subdivided in 4 sequential tasks: selection, contact, budget definition and signature of the contract
- “Venue”, which include drafting of a requirement list, search of the place, budgeting, selection, contract signature and layout of the meeting room
- “Agenda”, composed by drafting, validation and distribution
- “Handout”, which include the contribution from/by the speakers and can vary in function of the techniques adopted for the seminar (i.e. small thematic work groups, plenary session).
- “Audio/Video”
- “Supporting staff”
- “Final products”, i.e. Memorandum, minutes.

The logical **sequence** tells us that the organization of the venue is linked to the presence of the speakers, as well as the identification of the most suitable techniques for training and the material to be used (handout, audio/video, ...). The list of requirements for the venue should take in consideration the characteristics of the event, the estimated number of participants, their needs in terms of transport, overnight stay, ... The agenda can be prepared only when the venue and the speakers have been identified and the speakers have estimated the duration of their speeches or training sessions. For each activity one or more responsible should be identified, considering where multi-tasking can occur or can be detrimental to the effective organization and implementation of the seminar.

**Step 4 Estimate Start-up, Duration and Completion of Activities**

In order to put the activity in a time frame, a **realistic estimate of the duration** of each task should be made, and then it should be built into the activity plan to establish likely
**start-up and end dates.** To ensure that the estimates are at least realistic, it is necessary to consult those who have the necessary technical knowledge or experience.

One of the most common problems arising in the preparation of activity plans is to underestimate the time required. This can happen for a number of reasons:

- essential activities and tasks have been overseen
- the interdependence of Activities has not been considered enough carefully
- the workload on the same human or physical resource has not been considered (i.e. one cannot schedule the same person or piece of equipment to do two or more things at once)
- rapid results have been (too optimistically) declared
- time necessary for procurement of services, supplies or works has not been taken into account or underestimated

**Step 5 - Summarise Scheduling of Main Activities**

Having specified the timing of the individual tasks that make up the main Activities, it is useful to provide an overall summary of the start-up, duration and completion of the main activity itself.

**Step 6 – Define Milestones**

Milestones are key events that provide a measure of progress and a target for the project team to aim at. Normally a milestone is the end of a stage that marks the completion of a work package or phase, typically resulting in an event and a deliverable. The simplest milestones are the dates estimated for completion of each Activity – e.g. *training needs assessment completed by January 201X*. Milestones are extremely useful for the monitoring and reporting of the project implementation.

**Step 7 – Define Expertise**

Once the tasks have been defined it is possible to specify the type of expertise required and to check if the action plan is feasible, given the human resources available. To define expertise the questions to answer are the following:

- What are the capabilities and skills needed?
- Can the tasks actually be performed by the human resources at hand or a review is necessary?

**Step 8 – Allocate Tasks Among Partners’ Teams**

Allocating tasks implies assigning responsibilities for the achievement of milestones and in the long run of project results. Task allocation should take into consideration the capability, skills and experience of each Partner and member of the team and its

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4 A pre-defined tangible work product or event.
accountability face to the Beneficiary’s project manager. When delegating tasks to team members, it is important to ensure that they understand what is required of them. If their tasks are not clear, it means that the level of detail with which the relevant tasks are specified may have to be increased and it is necessary to run Step 2 again.

Reviewing of project activities

Reviewing the project planned activities can become necessary in any moment of the project life cycle.

During the kick-off meeting project Partners can be asked to indicate to what extent there have been changes in the situation in relation to the activities and/or results they are responsible for and discuss:

- The validity of the assumptions in the project logical framework
- The feasibility of the activities and results in the project logical framework

The Partners should discuss whether it is (still) possible to do all the activities the same way they were planned to achieve the expected results.

The Beneficiary and its project Partners should:

- Discuss the changes in circumstances and their possible consequences (this may also lead to changes in other activities).
- If necessary, adjust the project planning (minor changes: reallocate resources – financial of human- re-allocate tasks)
- Check the consequences of any change, keeping in mind that if one activity changes, this may also lead to changes to other activities

In all these cases, the Beneficiary informs the JMA and JTS in writing and consults them in order to verify whether the changes in the project planning will lead to an amendment to the Grant Contract or not.

Useful contacts

This document has been drawn up by the JTS officers. For further information, the Beneficiaries can contact the following officer, preferably by email:

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