EUPM²

Course Curriculum
v.1.0

Contents

0. Overview of the EUPM² Course Structure

Course Title	**Managing EU-Funded Projects with EUPM² Guide**
Short Course description:	The course aims at providing lean and easy-to-use guidance for defining step by step the activities, roles and responsibilities for the management of the EU-funded projects based on EUPM² Guide (v1.0).
Course Learning Objectives:	The overall learning objectives are the following: In term of **knowledge**, after the course the participants will be able to: • Acquire knowledge about the EU funding system, including the strategic and financial framework. • Understand the significance of EU funding programmes system and their role in promoting economic and social development. • Learn how design and manage an EU funded project following the specific EUPM² model. In terms of **competence**, after the course the participants will be able to: • Analyse and compare the characteristics and features of the different EU funding programs. • Assess the appropriateness of different EU funding programs for the different organizations based on their objectives, scale, and complexity. • Use the EUPM² model for designing and managing EU funded projects In terms of **skills**, after the course the participants will be able to: • Identify current trends and future developments in EU funding governance and critically evaluate their potential impact on the effectiveness and efficiency of funding programs. • Apply EUPM² model the to design and managing EU-funded projects within the EU funding programs. • Analyse case studies illustrating the practical application of different governance models and identify the factors contributing to their success or challenges.

EUPM² Course structure	The course is divided in two modules, each module is split into units and topics as follows:
	
	1. *Module*: **The EU Funding System**
	1.1 *Unit*: *The Institutional and Legal Framework of the European Union Funds*
	  1.1.2 *Topic*: <u>The EU Institutional framework and decision-making process.</u>
	  1.1.3 *Topic*: <u>The EU Strategic framework</u>
	  1.1.4 *Topic*: <u>The EU Financial framework</u>
	
	1.2 *Unit: The Governance of the EU Financing Programmes*
	  1.2.1 *Topic:* <u>The EU funding governance model</u>
	  1.2.2 *Topic:* Th<u>e EU financing programme management (PCM)</u>

	1.3 *Unit*: *Focus on Sectorial EU financing Programmes*
	   1.3.1 *Topic*: <u>EU financing programmes for Research and Environment</u>
	   1.3.2 *Topic*: <u>EU financing programmes on Social inclusion Employment</u>
	   1.3.3 *Topic*: <u>EU financing programmes on Education, Mobility and Youth</u>
	   1.3.4 *Topic*: <u>EU financing programmes on Development Cooperation</u>
	
	2. *Module:* The EU-Funded Projects Design and Management
	2.1 *Unit*: *Overview of EUPM² Guide Structure and the Governance Model*
	   2.1.1 *Topic*: <u>Introduction to project design and management</u>
	   2.1.2 *Topic*: <u>The main pillars of EUPM² Guide</u>
	   2.1.3 *Topic*: <u>The characteristics of EUPM² Guide Governance model</u>
	   2.1.4 *Topic*: <u>Roles and responsibilities</u>
	
	2.2 *Unit*: *EUPM² Guide Methodology Lifecycle, Processes, and Artefacts*
	   2.2.1 *Topic*: <u>Initiating Phase - processes and artefacts</u>
	   2.2.2 *Topic*: <u>Planning Phase – Designing stage, processes, and artefacts</u>
	   2.2.3 *Topic*: <u>Planning Phase – Preparing stage, processes, and artefacts</u>
	   2.2.4 *Topic*: <u>Executing Phase - processes and artefacts</u>
	   2.2.5 *Topic*: <u>Closing Phase - processes and artefacts</u>
	   2.2.6 *Topic*: <u>Monitoring and Control processes</u>

Duration	The minimum duration is 45hrs for a full course.
Methods of instructions	The general part of the course will be focused on knowledge transfer through face-to-face lessons and field seminars with professionals working on EU projects. During the course, lectures will mix with spontaneous interactive debates, aiming to test students' knowledge and understanding. The following teaching methods will be used: - **Lectures**: interactive lectures to introduce the key concepts, principles, and models, multimedia presentations, real-life examples, and case studies to enhance understanding and engagement. - **Group Discussions**: group discussions to encourage active participation and critical thinking among participants. specific topics or case studies for small group discussions, followed by a collective sharing of insights and conclusions. - **Case Studies**: case studies that illustrate the different course topics. Divide participants into small groups and assign each group a case study to analyze, discuss, and present their findings. This approach helps develop problem-solving skills and practical application of knowledge. - **Online Resources**: participants receive access to online resources such as articles, reports, videos, and interactive modules related to course topics.

1. *Module:* The EU Funding System

Module 1 Title:	**The EU Funding System**
Estimated duration (h):	The recommended duration is 15hrs for a full course.
Short Module description:	The Module will give an overview of how the EU funds are managed within the strategic context of the European Union.
Units and Topics	**1.1 *Unit:* The Institutional and Legal Framework of the EU Funds** 1.1.2 *Topic*: <u>The EU Institutional framework and decision-making process</u> 1.1.3 *Topic*: <u>The EU Strategic framework</u> 1.1.4 *Topic*: <u>The EU Financial framework</u> **1.2 *Unit*: The Governance of the EU Financing Programmes** 1.2.1 *Topic*: <u>The EU Funding Governance Model</u> 1.2.2 *Topic*: <u>The EU Financing Programmes Management</u> **1.3 *Unit:* Focus on Sectorial EU Financing Programmes** 1.3.1 *Topic*: <u>EU financing programmes for Research and Environment</u> 1.3.2 *Topic*: <u>EU financing programmes on Social inclusion Employment</u> 1.3.3 *Topic*: <u>EU financing programmes on Education, Mobility and Youth</u> 1.3.4 *Topic*: <u>EU financing programmes on Development Cooperation</u>

1.1 *Unit*: The Institutional and Legal Framework of the European Union Funds

Unit title:	*The Institutional and Legal Framework of the European Union Funds*
Duration	The minimum duration is **4hrs** for a full course.
Short introduction to the topic:	This topic starts by proving a general introduction to the course, including the aims, overall learning objectives and the structure. It then provides an overview of the EU unique institutional set up, as it's neither an international organization nor a country, of the main institutions involved in EU decision-making process and of the EU institutional ecosystem. Then the EU Financial framework will be presented as serves as a foundation for more detailed policies and actions. Finally, the Multiannual Financial Framework (MFF) will be explained in detail as well as the programs funded under the multiannual financial framework 2021-2027.
Unit Learning Objectives	*Knowledge* The participant will be able to: • Understand the specific institutional nature of the European Union, its governance and decision-making model. • Understand the importance of the EU's strategic agenda, the definition of priorities and their relationship with the EU budget.

	• Understand how the Multiannual Financial Framework (MFF) is drawn up, how priorities are defined in the EU budget and what implications this has for the funding of the various policies. • Learn about the sources of funding available in the EU for the various areas (e.g. agriculture, regional development, research and innovation) *Competence* The participant will be able to: • Identify sources of funding available in the EU for the various areas (e.g. agriculture, regional development, research, and innovation) • Navigate in the complex EU webpages to search for valuable information about EU funds. • Find the information required on available fundings. • Pick up and assimilate relevant information. • Manipulate and interpret that information. • Decide on the adequate source of funding to apply according to the objectives of the project. *Skills* The participant will be able to: • Communicate information and ideas clearly and articulately with the team. • Planning and organizing the information collected in a way that is valuable for the project.
Topics	This Unit include the following topics: 1.3.2 *Topic*: The EU Institutional framework and decision-making process - Introduction to the functioning of the European Union - The European Union institutions and their role in the EU funding system - The EU decision-making and the legislative process 1.3.3 *Topic*: The EU Strategic framework - The EU strategic agenda (2020-2030) - The synergies with the SDGs 1.3.4 *Topic*: The EU Financial framework - The composition of the EU budget - The Multi Annual Financial Framework MFF (2021-2027) - The EU Budgetary Cycle - The Next Generation EU instrument
Teaching Materials:	The main teaching materials: • EUPM[2] Teaching Slides • Additional materials provided by teachers.
Suggested videos:	On the official website of the European Commission students can find a large amount of information as well as multimedia on the topics covered in this session.

	In particular:
	- Information on the EU Budget at the European Commission https://commission.europa.eu/strategy-and-policy/eu-budget_en
	- Information on Policies and Initiatives https://commission.europa.eu/strategy-and-policy_en
	- The EU budget explained https://www.youtube.com/watch?v=39RVLAG0v4U

1.2 *Unit:* The Governance of the EU Financing Programmes

Unit title:	*Governance of EU Financing Programmes*
Duration	The minimum duration is 5hrs for a full course.
Short introduction to the unit:	This unit provides an overview of the governance model and financial program management within the European Union (EU). This unit aims to familiarize participants with the different governance models used for EU funding programs, including direct, shared, and indirect governance. It also covers the principles and practices of financial program management (PCM) within the EU context.
Unit Learning Objectives	**Knowledge** The participant will be able to: - Acquire knowledge of the EU governance model for funding programs, including the concepts of direct, shared, and indirect governance. - Gain an understanding of financial program management within the EU context, including its purpose and significance in ensuring effective utilization of funds. **Competence** The participant will be able to: - Analyse and compare the characteristics and features of direct, shared, and indirect governance models used in EU funding programs. - Evaluate the advantages and disadvantages of each governance model in terms of accountability, decision-making efficiency, and stakeholder involvement. - Assess the appropriateness of different governance models for specific funding programs based on their objectives, scale, and complexity. - Assess reporting and accountability practices in financial program management, including the requirements for financial statements and performance reports. **Skills** The participant will be able to: - Apply the knowledge gained to classify and categorize examples of direct, shared, and indirect governance in EU funding programs.

	• Apply the knowledge of financial program management to analyse and propose appropriate financial programming and budgeting strategies for EU funding programs.
Topics	1.2.1 *Topic*: <u>The EU Funding Governance Model</u> - Introduction to EU funding programs and their significance - Overview of the EU governance model for funding programs - Direct governance: Definition, characteristics, and examples - Shared governance: Definition, characteristics, and examples - Indirect governance: Definition, characteristics, and examples - Comparative analysis of the advantages and disadvantages of each governance model - Case studies illustrating the practical application of different governance models. - Current trends and future developments in EU funding governance 1.2.2 *Topic*: <u>The EU Financing Programmes Management:</u> - Introduction to financial programme management in the EU context - Key principles and objectives of financial programme management - Overview of the EU financial framework and regulations - Financial programming and budgeting processes - Financial control mechanisms and audit procedures - Reporting and accountability in financial programme management - Risk management and fraud prevention strategies - Good practices and case studies showcasing successful financial programme management.
Teaching materials:	The main teaching materials • EUPM^2 Guide (v 1.0) – section 2 • EUPM^2 Teaching Slides • Additional materials provided by teachers.
Suggested readings:	The following link will complement the teaching materials: • https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe_en • https://www.horizon-eu.eu/ • https://single-market-economy.ec.europa.eu/industry/strategy/hydrogen/funding-guide/eu-programmes-funds/life-programme_en • https://webgate.ec.europa.eu/life/publicWebsite/search • https://cinea.ec.europa.eu/programmes/life_en
Suggested videos:	The following video will complement the teaching materials: • https://www.youtube.com/watch?v=g8BQNnX6_kY • https://www.youtube.com/watch?v=w83oc43wqvo

1.3 *Unit*: Specific EU Financing Programmes

Unit title:	*Specific EU Financing Programmes*
Duration	The minimum duration is 6hrs for a full course.
Short introduction to the unit:	The Unit will present the structure and aims of the main EU funding programmes available for the programming cycle 2021-2027. For the main EU funding programmes the goals, actions and funding mechanisms will be presented.
Unit Learning Objectives	***Knowledge*** The participant will be able to: • Understand the structure and goals of the main EU funding programmes. • Acquire knowledge of the key principles and objectives the main EU funding programmes. • Gain knowledge of the Evaluation criteria and how the points are awarded. • Acquire knowledge of the key measures to maximise impact of the projects. ***Competence*** The participant will be able to: • Identifying components and actions eligible for funding in the main EU funding programmes • Understand how the main EU funding programmes can support the beneficiaries' activities. ***Skills*** The participant will be able to: • Explain the main goals and usage of the main EU funding programmes. • Identifying Calls for Proposals financed under the main EU funding programmes. • Find projects that will be eligible for funding by the main EU funding programmes. • Find the links between policy priorities and project results.

Topics	The session will cover the following topics:
	
	1.3.1 *Topic*: <u>EU Financing Programmes for Research and Environment</u>
	  - Horizon Europe main pillars
	  - Life+
	
	1.3.2 *Topic*: <u>EU Financing Programmes on Social inclusion and Employment</u>
	  - European Social Fund+
	  - EU Funds structure and ESF+ position and history
	  - European Pillars and Social Rights
	  - Distribution of support from ESF+

	1.3.3 *Topic*: <u>EU Financing Programmes on Education, Mobility and Youth</u> - Introduction to the Erasmus + - Main funding mechanisms and Programmes - Key Action 1: Mobility of individuals - Key Action 2: Cooperation among organisations and institutions - Key Action 3: Support to policy development and cooperation - Jean Monnet **1.3.4** *Topic*: <u>EU Financing Programmes on Development Cooperation</u> - Introduction to the EU´s Development Cooperation Policy - Size and political importance - Main political elements - Key areas for Development Cooperation - Main funding mechanisms and Programmes - Overview of the EC Development Cooperation Assistance Useful resources
Teaching materials:	The main teaching materials: • EUPM[2] Teaching Slides • Additional materials provided by teachers.
Suggested readings:	For EU-financing programmes for Research and Environment • https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe_en • https://www.horizon-eu.eu/ • https://single-market-economy.ec.europa.eu/industry/strategy/hydrogen/funding-guide/eu-programmes-funds/life-programme_en • https://webgate.ec.europa.eu/life/publicWebsite/search • https://cinea.ec.europa.eu/programmes/life_en For EU-financing programmes on Social inclusion and Employment • https://ec.europa.eu/social/main.jsp?catId=325 • https://ec.europa.eu/european-social-fund-plus/en • https://ec.europa.eu/european-social-fund-plus/en/support-your-country For EU-financing programmes on Education, Mobility and Youth • https://erasmus-plus.ec.europa.eu/ • https://erasmus-plus.ec.europa.eu/about-erasmus/what-is-erasmus For EU-financing programmes on Development Cooperation • https://international-partnerships.ec.europa.eu/policies/european-development-policy/european-consensus-development_en • https://wikis.ec.europa.eu/display/ExactExternalWiki/6.+Grants • https://capacity4dev.europa.eu/

	For Next Generation EU ○ https://commission.europa.eu/strategy-and-policy/eu-budget/eu-borrower-investor-relations/nextgenerationeu_en

Suggested videos:	For EU-financing programmes for Research and Environment
	    • https://www.youtube.com/watch?v=g8BQNnX6_kY
	    • https://www.youtube.com/watch?v=w83oc43wqvo
	
	For EU-financing programmes on Social inclusion and Employment
	    • European Pillar of Social Rights - Building a fairer and more inclusive European Union - Employment, Social Affairs & Inclusion - European Commission (europa.eu)
	
	For EU-financing programmes on Development Cooperation
	    • https://www.youtube.com/watch?v=QILF3xDs2c0

2. The EU-Funded Projects Design and Management

Module 2 Title:	The EU-Funded Projects Design and Management
Estimated duration (h):	The minimum duration is 25hrs for a full course.
Short Module description:	The Module will give an overview of how the EU funded projects are designed and managed within the strategic context of the European Union according to the EUPM^2 model.

Topics and Units	**2. *Module:* The EU Funded Project Design and Management**
	2.1 *Unit*: Overview of EUPM^2 Guide Structure and Governance Model
	  2.1.1 *Topic*: Introduction to project design and management
	  2.1.2 *Topic*: The main pillars of EUPM^2 Guide
	  2.1.3 *Topic*: The characteristics of EUPM^2 Guide Governance model
	  2.1.4 *Topic*: Roles and responsibilities
	
	2.2 *Unit*: EUPM^2 Guide Lifecycle, Processes, and Artefacts
	  2.2.1 *Topic*: Initiating Phase - processes and artefacts
	  2.2.2 *Topic*: Planning Phase – Designing stage, processes, and artefacts
	  2.2.3 *Topic*: Planning Phase – Preparing stage, processes, and artefacts
	  2.2.4 *Topic*: Executing Phase - processes and artefacts
	  2.2.5 *Topic*: Closing Phase - processes and artefacts
	  2.2.6 *Topic*: Monitoring and Control processes

2.1 *Unit:* Overview of the EUPM^2 Guide Structure and the Governance Model

Unit title:	*Overview of the EUPM^2 Guide structure and the governance model*
Duration	The recommended duration is 10hrs for a full course.
Short introduction to the unit:	This Unit provides an overview of the EUPM^2 Guide structure, explaining its main pillars, such as the house of PM^2, the EUPM^2 governance model, lifecycle and phase drivers and main artefacts. The Unit will also deal with project governance and organization describing the importance of project governance and provide framework for successful project management. The unit shows solutions provided by EUPM^2 Guide, which includes organization model and detailed descriptions of roles and responsibilities, also summarized in ARSCI matrix format (RASCI matrix).
Unit Learning Objectives (LOs)	**Knowledge** The participant will be able to: • Understand the significance of projects and project management profession for successful project delivery. • Gather knowledge about key global methodologies in project management and position the EUPM^2 Guide.

	• Understand the EUPM^2 governance framework for project roles and responsibilities. • Acquire knowledge for each project role and related responsibility, as described in the EUPM^2 Guide. **Competence** The participant will be able to: • Recognize and construct project management framework towards project successful delivery. • Analyse and set project context and propose governance model based on EUPM^2 Guide. • Set project organization layers based on EUPM^{2}concept for real case projects. • Select project roles to monitor their performance in regards their responsibilities, as defined by EUPM^2 Guide. **Skills** The participant will be able to: • Apply the presented knowledge about project management methodology. • Construct project success framework with the key factors and criteria based on project success or failure reports. • Apply the presented knowledge about project governance. • Practice project governance framework and its relationship with project success • Prepare project organization chart and responsibility matrix based on EUPM^2 Guide. • Extract good practices from case studies towards more effective project organization supported by EUPM^2 Guide
Topics	2.1.1 *Topic*: <u>Introduction to Project Design and Management</u> - what is project, and why projects are important for people organizations and communities. - what is the current project share in overall people endeavors: private and public sector perspectives. - what is project management, and why we need it for project delivery process and project deliverable. - an insight in the key global project management standards and methodologies. - how the EUPM^2 Guide contributes to project management body of knowledges and responds to EU funded project needs. 2.1.2 Topic: <u>The Main Pillars of the EUPM² Guide</u> - the structure of the EUPM^2 Guide and main pillars for EU funds methodology. - the EUPM^2 Guide lifecycle and key features for the main phases. - the key drivers and artefacts per phases. - why the EUPM^2 Guide it is suitable for application at EU funded / co-funded projects.

	- Examples of EUPM[2] Guide uses in the practice. 2.1.3 *Topic*: <u>The characteristics of PM² for EU funds Governance model</u> - what is project governance and why it is important. - what is the framework for successful governance. - how are project governance and project management banded. - what happens if there is no proper project governance. - who is responsible for setting project governance. - an example of project governance model provided by other PM methodologies (i.e. ISO). 2.1.4 Topic: <u>Roles and responsibilities</u> - the project organization model described in the EUPM[2] Guide. - the layers in organization model and their roles, together with relationships among those - detailed insight in particular role and its responsibility, as defined by EUPM[2]Guide. - documenting of the key roles and their responsibilities, (RAM matrix, or ARSCI Matrix) - examples of roles and responsibilities for real case projects, formatted by EUPM[2] Guide.
Teaching materials:	The main teaching materials will be the following: • EUPM[2] Guide (v 1.0) – Section 3, Section 4, Appendix B • EUPM[2] Teaching Slides • Additional materials provided by teachers.

2.2 *Unit* EUPM² Lifecycle, Processes and Artefacts

Unit title:	*EUPM² Lifecycle, Processes and Artefacts*
Duration	The minimum duration is **20hrs** for a full course.
Short introduction to the unit:	This Unit presents the EUPM[2] Guide lifecycle, processes, and artefacts. For each phase a detailed description of the main processes, gates and artefacts will be outlined. The Unit will also deal with the main project design and management tools for managing the project variables, as scope, timing, resources, costs and risks as well as for monitoring them.
Unit Learning Objectives (LOs)	***Knowledge*** The participant will be able to: • Understand how to design and manage an EU-funded project based on EUPM[2] model. • Understand the processes to carry out in each EU-funded project phase. • Understand how to plan and manage the main project variables (scope, resources, time, risks etc.) • Understand the aim, objectives, and content of the different artefacts.

	Competence
	The participant will be able to:
	- Plan the process of submitting a project proposal in a Call for Proposals - Plan and manage effectively an EU-funded project. - Identifying Strengths, Weaknesses, Threats and Opportunities in a project idea and transform a project idea into a project proposal. - Capture the importance of the Stakeholders in projects.
	Skills
	The participant will be able to:
	- Systematically approach the design and management of an EU-funded project using EUPM^2 model. - Identifying indicators to measure outputs and impact. - Systematically approach problem and objective analysis - Design the core terms of a Logical Framework Matrix
Topics	2.2.1 *Topic*: <u>Initiating Phase - processes and artefacts</u> - Overview of the Initiating Phase - Purpose and activities - Key artefacts - Initiating Meeting - The Project Submission Request - The Project Fiche - Phase Gate – Ready for Design 2.2.2 *Topic*: <u>Planning Phase – Designing stage, processes, and artefacts</u> - Project Stakeholder Matrix - Stakeholder mapping and analysis - Project Logical Framework - The Logical Framework Approach - The Logical Framework Matrix (LFM) - Project Application Form - The scope breakdown - Effort & Cost estimates - Project Schedule - Risk identification - Financing Decision 2.2.3 *Topic*: <u>Planning Phase – Preparing stage, processes, and artefacts</u> - Structure and content of the Grant and Partnership Agreement. - Elaboration of the Project Handbook and the related project management plans. - Update of the Project Work Plan and development of the Project. Plans, including Communication and Dissemination Plan. 2.2.4 *Topic*: <u>Executing Phase - processes and artefacts</u> - Executing kick-off meeting. - Coordination of the project activities. - Creation of project reports. - Communicate the project results.

	2.2.5 *Topic*: <u>Closing Phase - processes and artefacts</u> - Project end-review meeting. - Elaboration of the Final project report. - Capturing the lessons learned. - Archive the project documentation. 2.2.6 *Topic*: <u>Monitoring and Control processes</u> - Monitor project performance. - Control the schedule and costs. - Manage the stakeholders. - Manage the project changes. - Manage the Risks. - Manage outsourcing.
Teaching materials:	The main teaching materials will be the following: • EUPM² Guide (v 1.0), Section 5, Section 6, Section 7, Section 8, Section 9 • EUPM² Teaching Slides • Additional materials provided by teachers
Suggested readings:	• EuropeAid Project Cycle Management Guidelines, European Commission, Aid Delivery Methods: https://capacity4dev.europa.eu/library/europeaid-project-cycle-management-guidelines • The Log frame Handbook – A Logical Framework Approach to Project Management, World Bank 31240: https://documents.worldbank.org/en/publication/documents-reports/documentdetail/783001468134383368/the-logframe-handbook-a-logical-framework-approach-to-project-cycle-management
Suggested videos:	• The 5 why technique – short video: https://youtu.be/SrlYkx41wEE (to be watched in the classroom) • Problem and objective trees – short videos: https://youtu.be/YZ1Q06uM9WQ and https://youtu.be/YZ1Q06uM9WQ