

***PROJECT CYCLE MANAGEMENT FOR DIGITAL, ECOLOGICAL AND
SOCIAL INNOVATIONS
Euro-planning techniques***

Elisabetta Boglich, PhD

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**UNIVERSITÀ
DEGLI STUDI
DI TRIESTE**



Dipartimento

**Scienze Politiche
e Sociali**

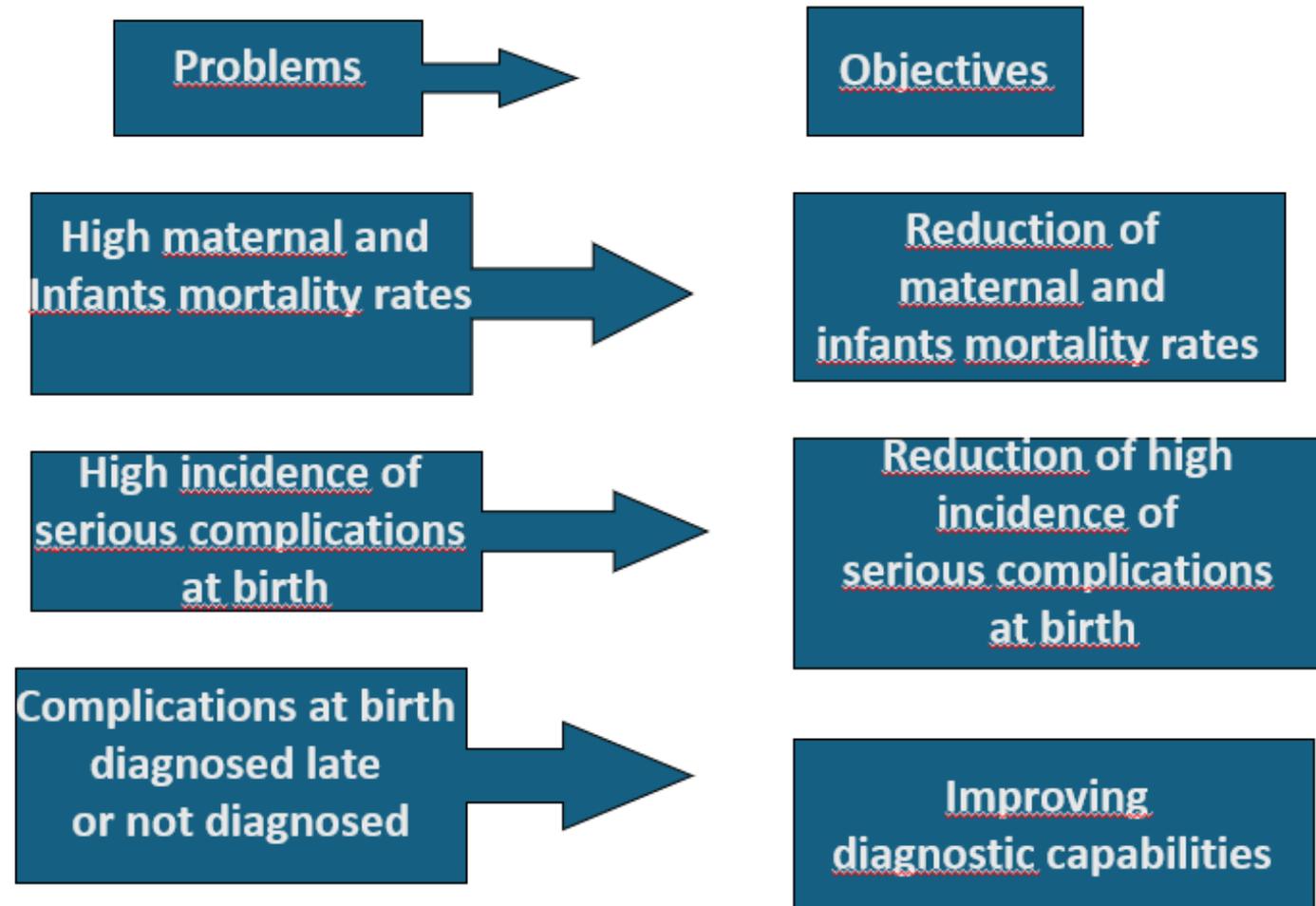
Analysis of objectives

As we have seen, the analysis of problems describes the negative aspects of the existing situation. The analysis of objectives, on the other hand, presents the positive aspects of the desired situation for the future. This analysis involves reformulating the problems into achievable objectives.



Analysis of objectives

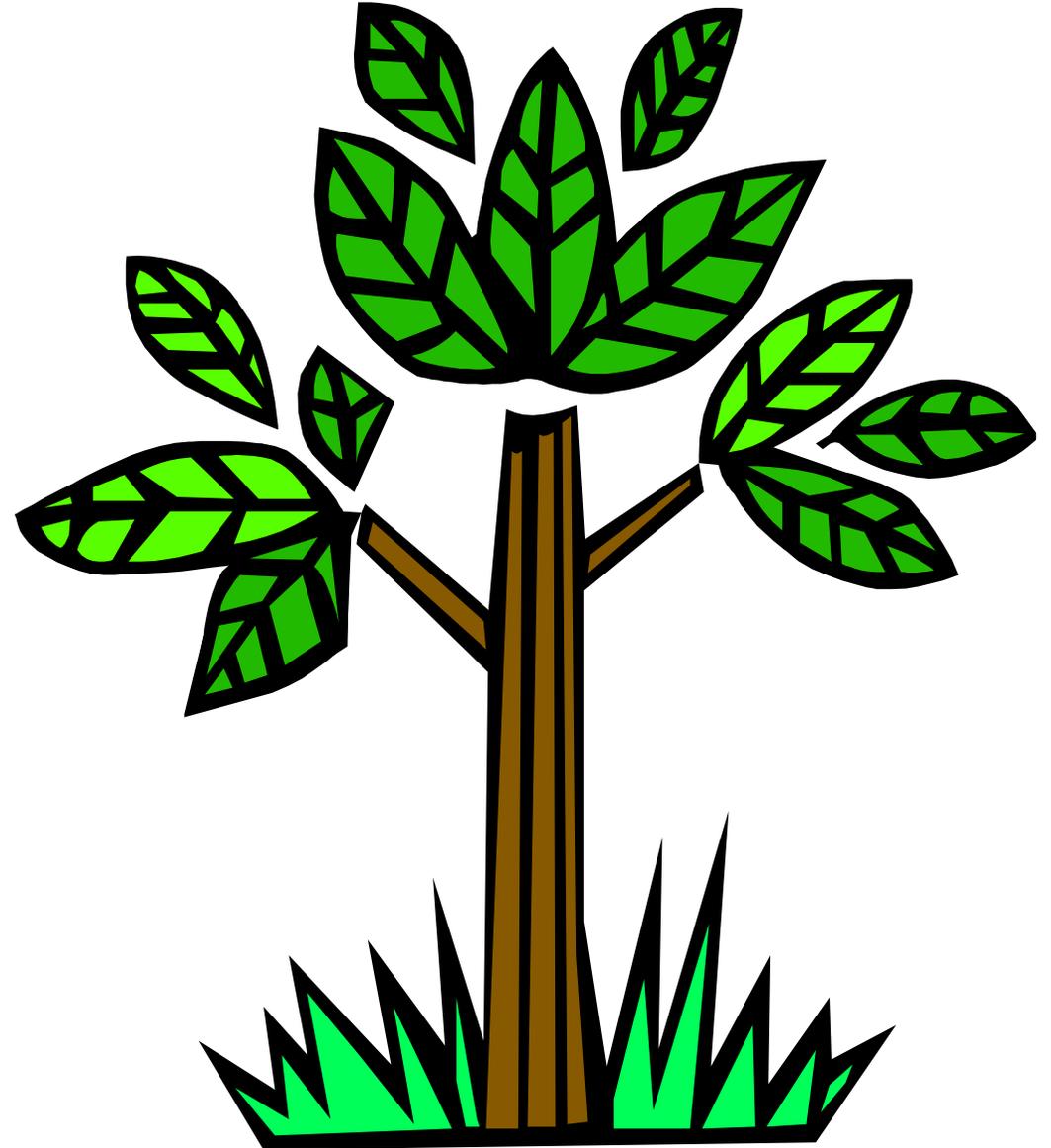
Turn problems into goals



Turn problems into goals

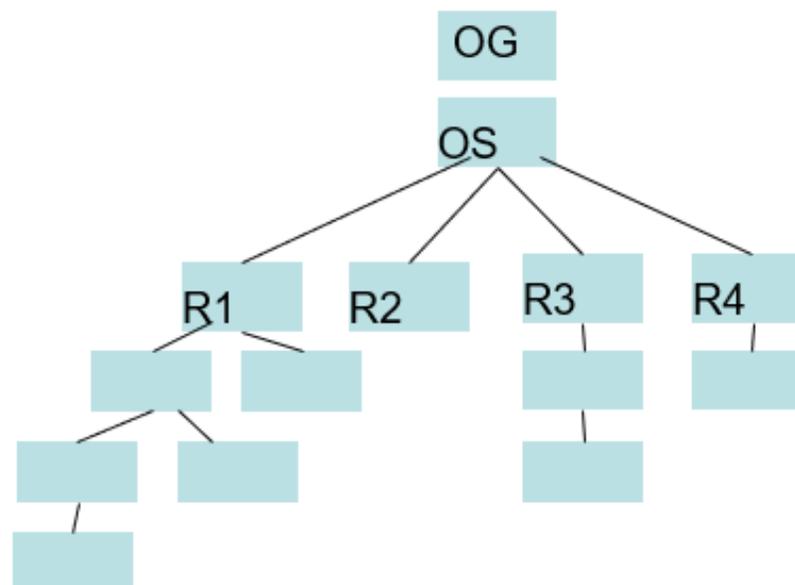
The **Goal Tree** can be thought of as the positive mirror image of the Problem Tree, where the cause-effect relationship between problems is replaced by that of “**means to an end**”, where the Goal is the means to solve the problem.

Once completed, the Goal Tree provides a comprehensive picture of the desired future situation.



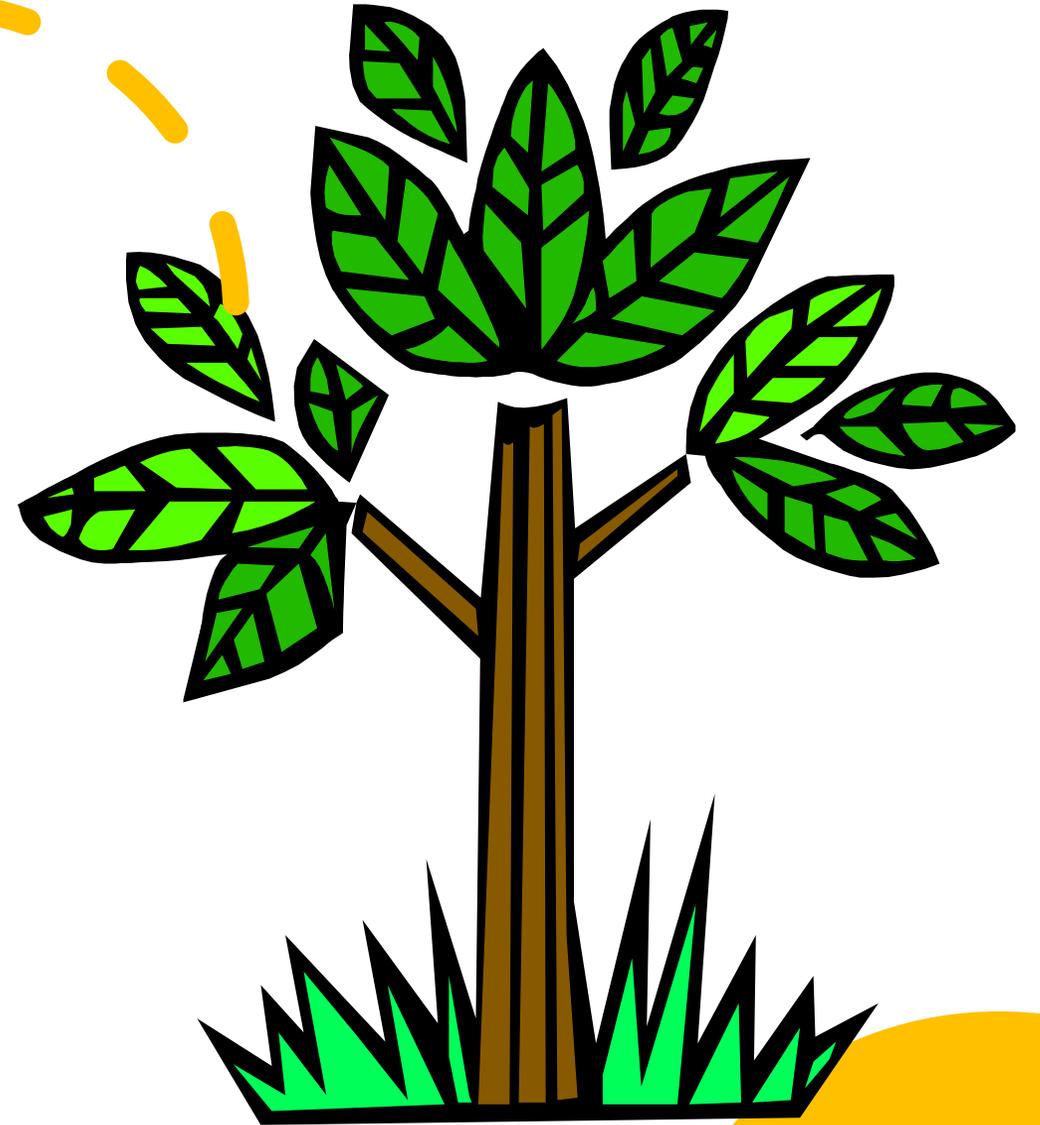
Turn problems into goals

Translate problems and causes into their solution (i.e. the description of the solved problem) by verifying the existence of any overarching problems.



Intervention strategy analysis

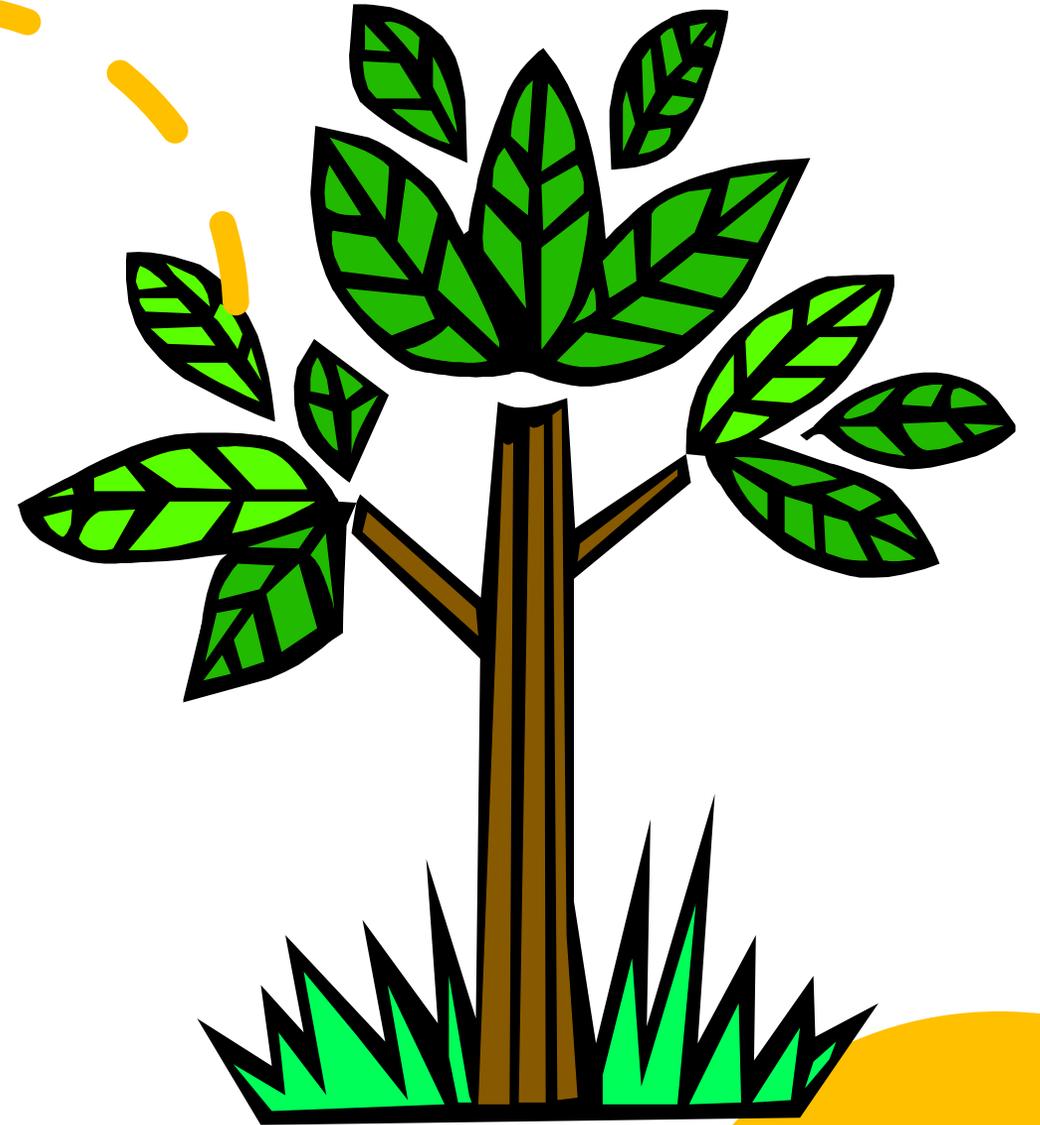
The final stage of the analysis phase involves **selecting the strategy** (or strategies) that will be used to achieve the set objectives. Strategy analysis is used to decide which objectives will be included IN the project and which will be left OUT, what the specific objective of the project will be and what the general objectives will be.



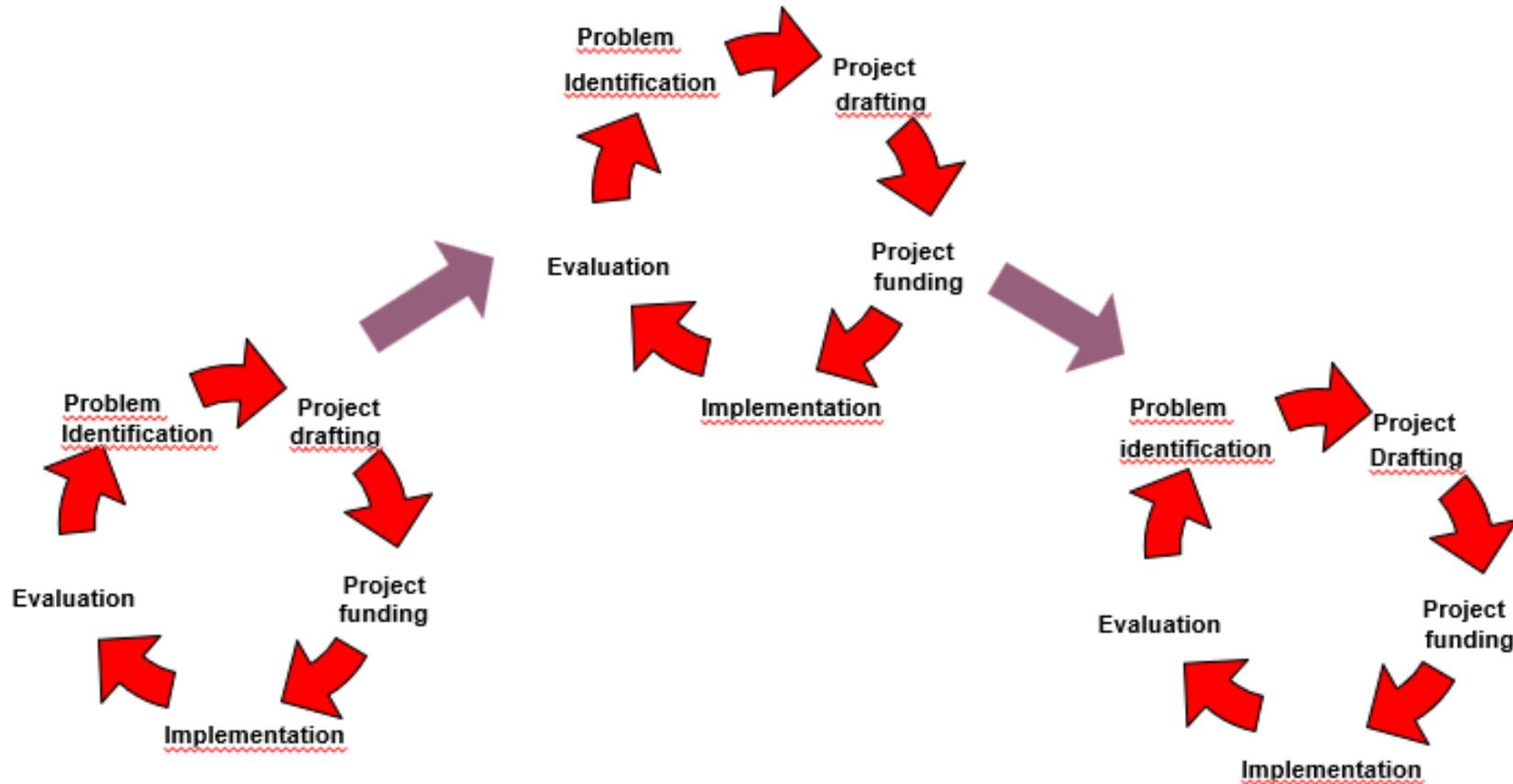
Intervention strategy analysis

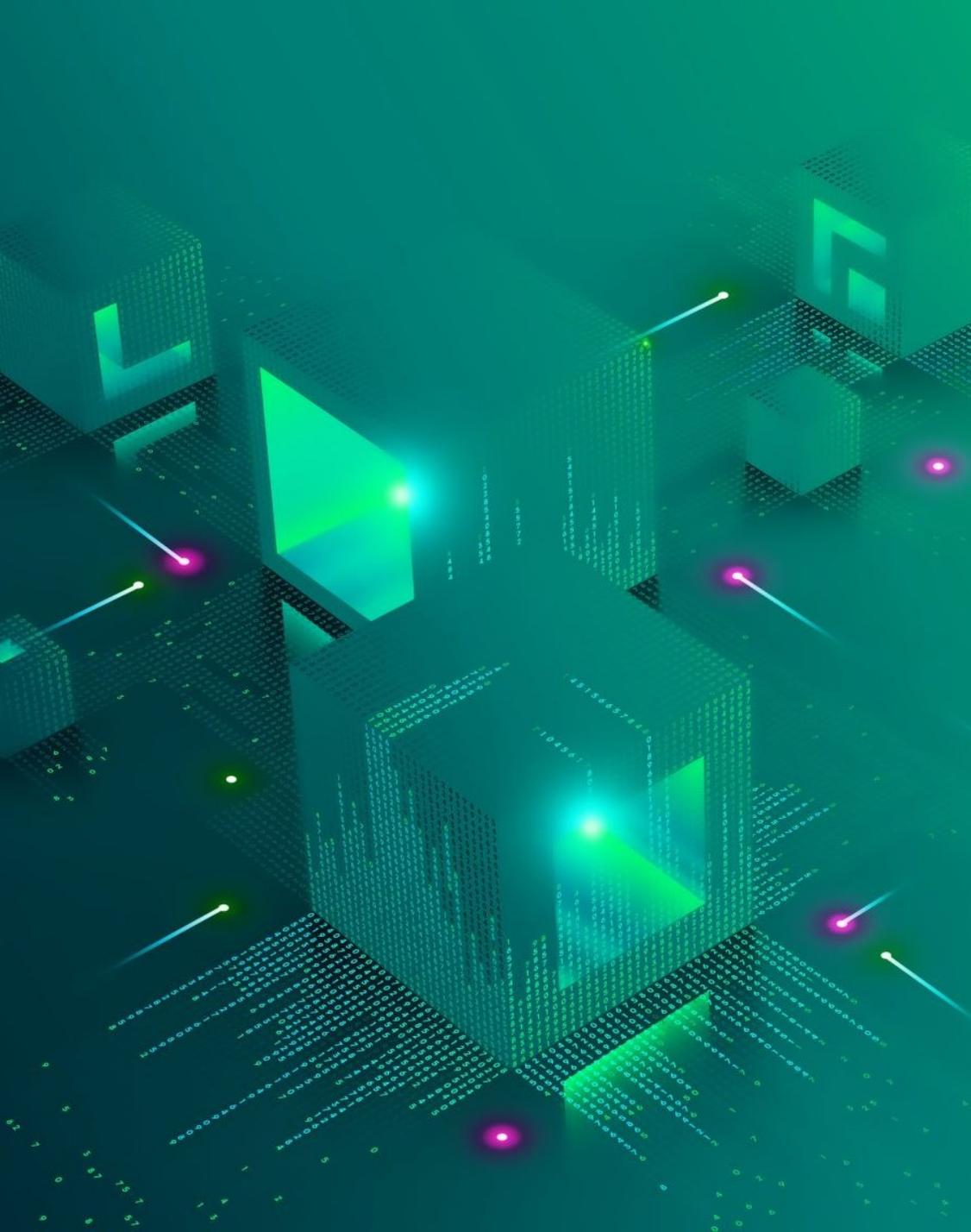
Depending on the scope of a program's objectives and the amount of work to be undertaken, the Strategy Analysis will enable the type of project to be defined.

This may range from a specific intervention project to a complex program consisting of a large number of projects.



Intervention strategy analysis





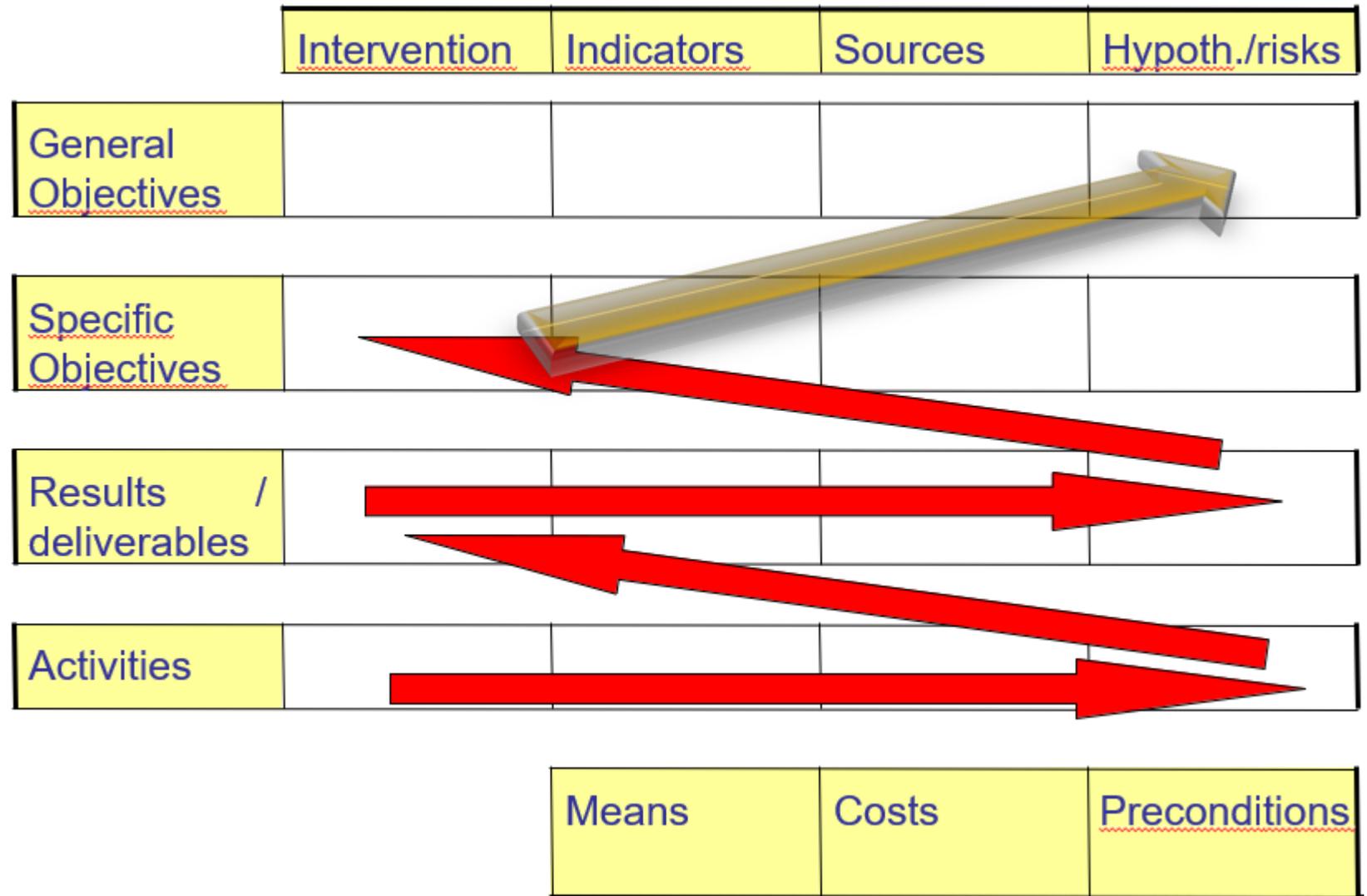
The Logical framework

The logic of the LF is expressed in a matrix that is its product. The matrix encapsulates the project's intervention logic and describes the relevant conditions and possible risks inherent in the chosen logic. The LF defines the project's functions, the necessary resources and management responsibilities.

The logical framework matrix

	<u>Intervention</u>	<u>Indicators</u>	Sources	<u>Hypoth./risks</u>
<u>General Objectives</u>		Impact		
<u>Specific Objectives</u>		<u>Effect</u>		
<u>Results / deliverables</u>		<u>Effect</u>		
Activities				
	<u>Means</u>	Costs	<u>Preconditions</u>	

Logical path if...then



Strategy of intervention

	<u>Intervention</u>	<u>Indicators</u>	Sources	<u>Hypoth./risks</u>
<u>General Objectives</u>				
<u>Specific Objectives</u>				
<u>Results / deliverables</u>				
Activities				

Means	Costs	<u>Preconditions</u>
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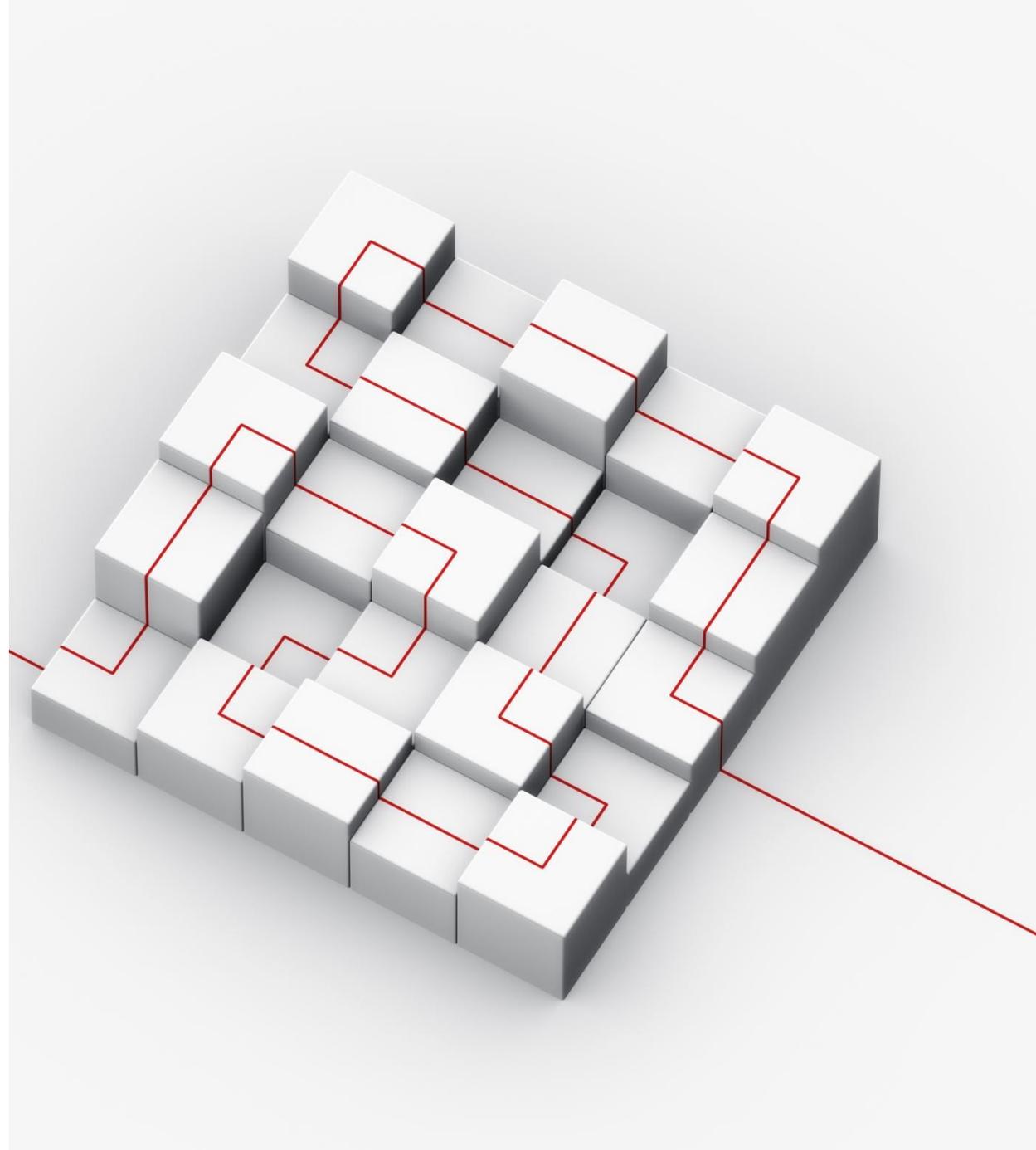
The Logical Framework

- LF alone does not guarantee the success of a project;
- The LF method takes a long time and requires considerable preparation;
- LF provides a tool for checking the internal logic of the project and ensures that activities, results and objectives are interconnected.



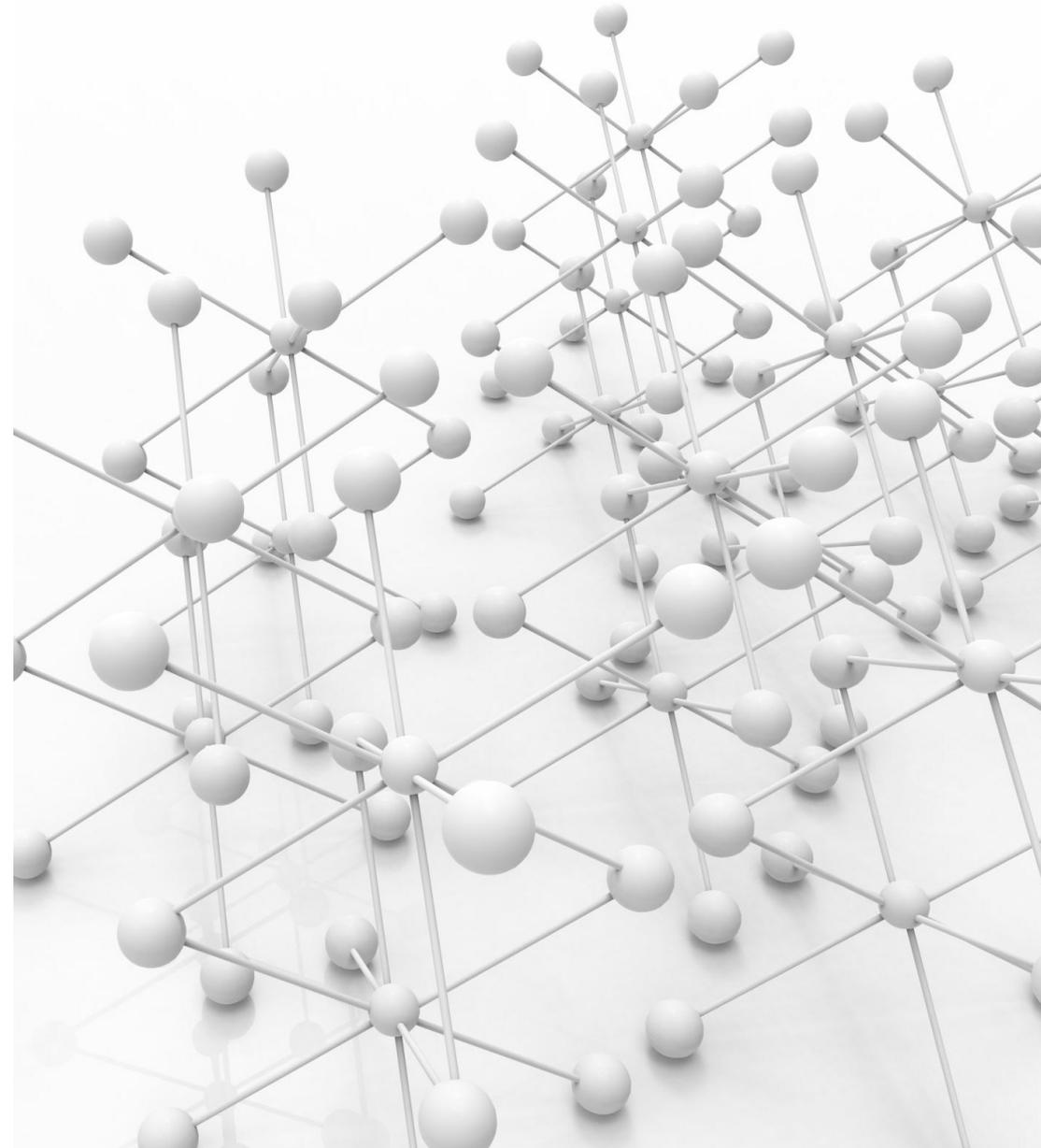
The logical framework

- The LF consists of a table or matrix composed of four columns and, in the basic format, four rows;
- The columns identify what the project intends to do, clarify causal relationships and specify the conditions and uncertainties that are beyond the control of the direct management of the project;
- The rows refer to the measurement of the project's effects, defined by key indicators and means of verification, and to the resources used.



Objectives: the different levels

- The objectives selected by the Objectives Tree to be included in the project are transposed into the first column of the matrix: they define the project's intervention logic.
- At this stage, it is important to correctly distinguish between the different levels of objectives:
 - **General Objectives (GO)**
 - **Specific Objective (SO)**
 - **Expected results**
 - **Activities**



General objectives



General or strategic objectives

- ✓ They answer the question ‘**why?**’
- ✓ They describe the reason for the project
- ✓ They are defined in the medium/long term
- ✓ When pursued, the **project contributes to...**
- ✓ There may be more than one, but in any case a limited number (3-5)
- ✓ They are expressed as a description of the state to be achieved

General objectives



General or strategic objectives

- They describe the importance for society in general of the long-term benefits for the beneficiary groups, and more general benefits for other groups;
- They link the program to the regional/sectoral policies of the EU and the government/organization with which it collaborates;
- They will not be achieved by the single project in question alone but will require the impact of other programs and projects.

Specific objective



- ✓ It answers the question 'what'?
- ✓ It describes the change brought about by the project and is expressed in the present tense
- ✓ It is a description of the problem that has been solved
- ✓ It is defined in the short/medium term
- ✓ It is only **one**
- ✓ It must be achieved by the end of the project
- ✓ It is expressed as a description of the desired outcome

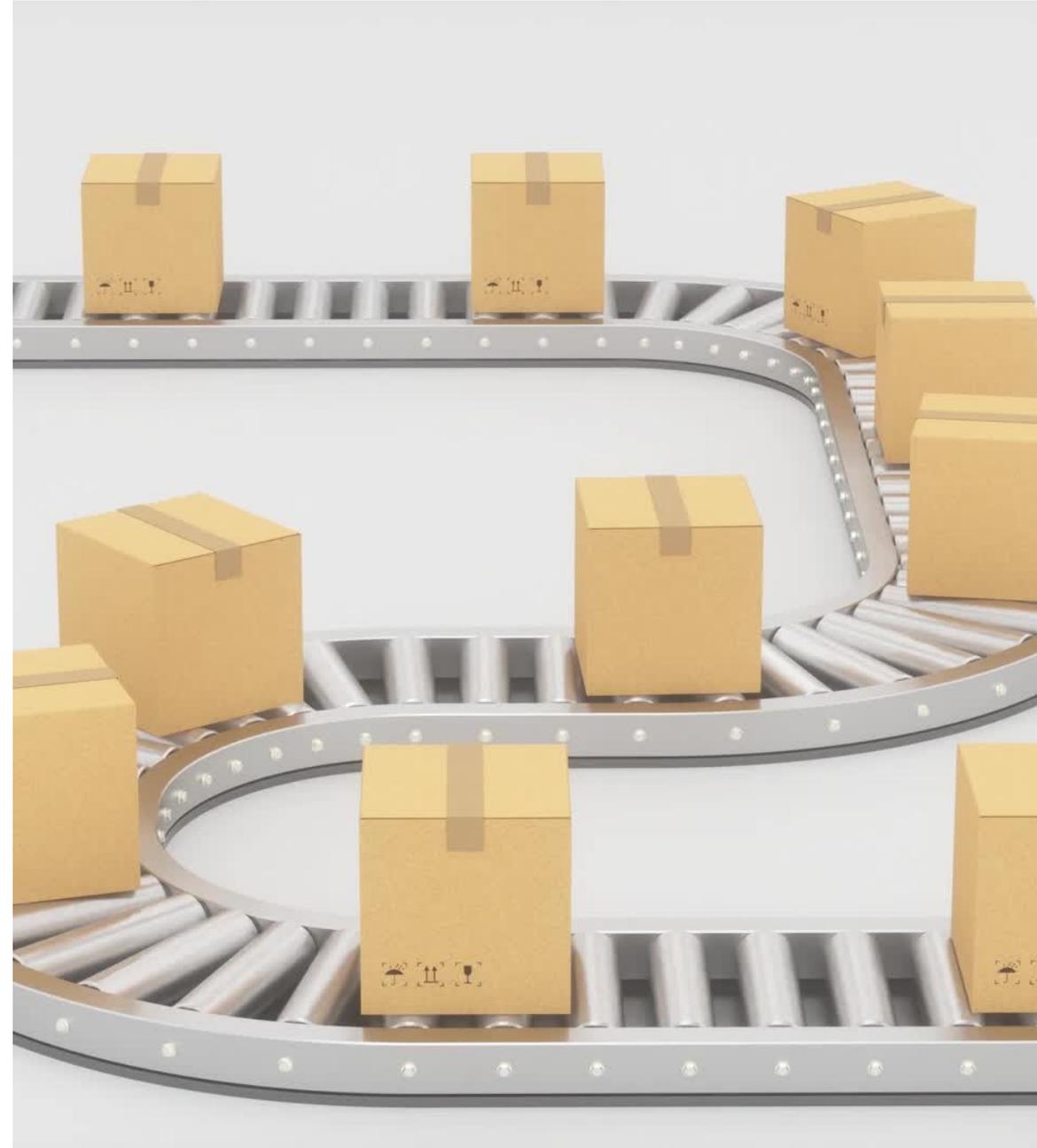
Expected results and activities



- ✓ The expected results represent the services that the project must offer to the chosen target group.
- ✓ The activities are the ways in which the goods and services will be distributed within the project.

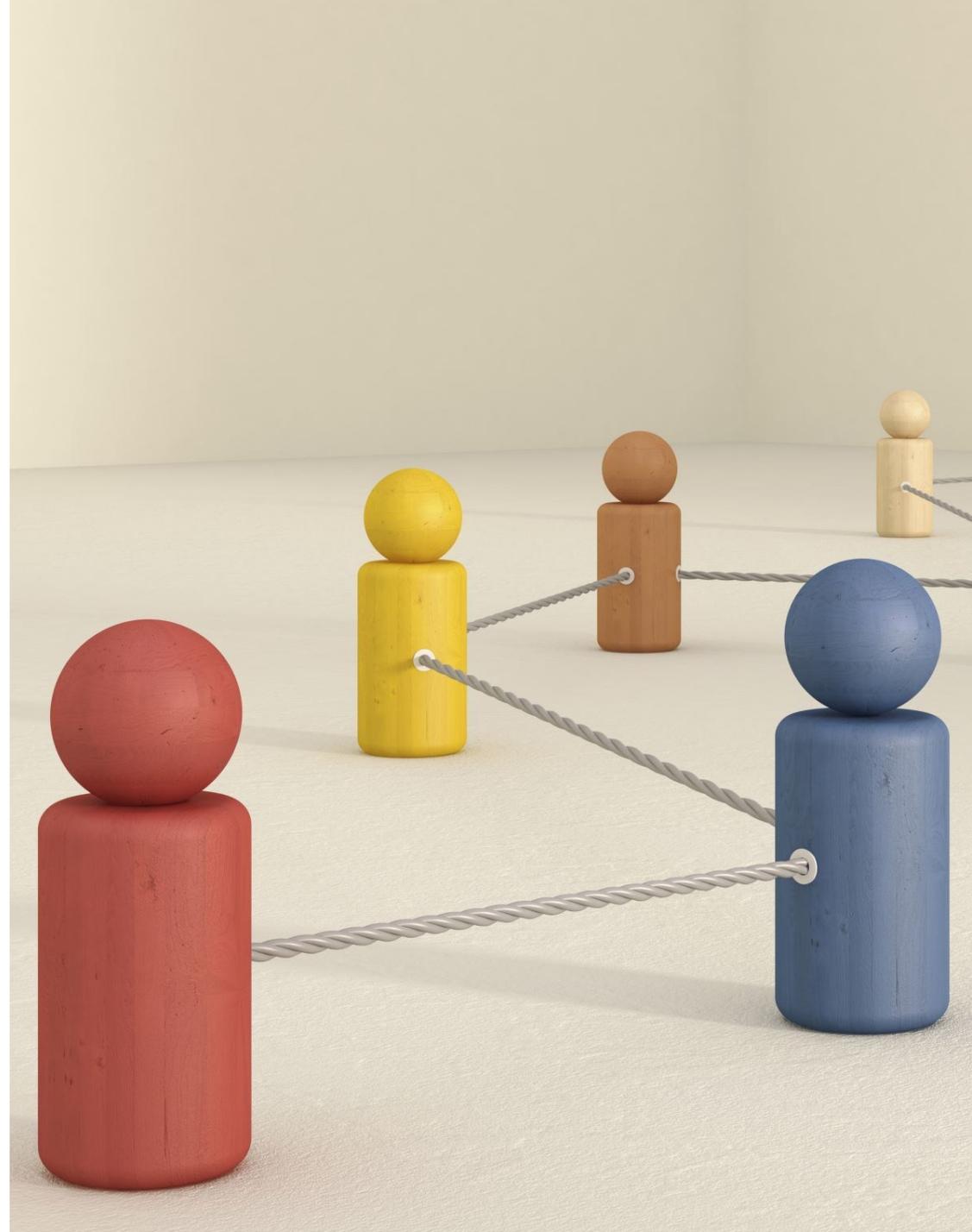
Results and deliverables

- Tangible products generated by project activities and necessary for achieving the specific objective;
- ≠ objectives
- ≠ outputs
- Deliverables are intermediate products, purely instrumental to the production of results, e.g. *project meetings*;
- Please note: the team is responsible for achieving the results!

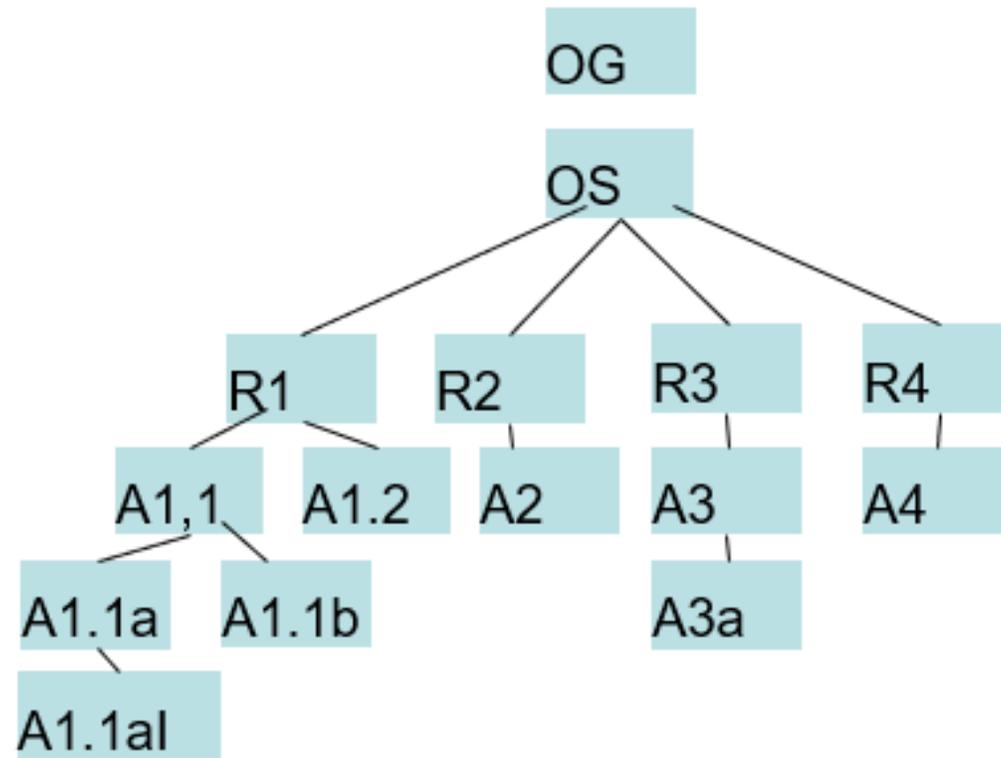


Actions and workplan

- Actions that the team carries out to generate the results necessary to achieve the specific objective;
- Chronological sequence and indication of the necessary inputs (Gantt chart).



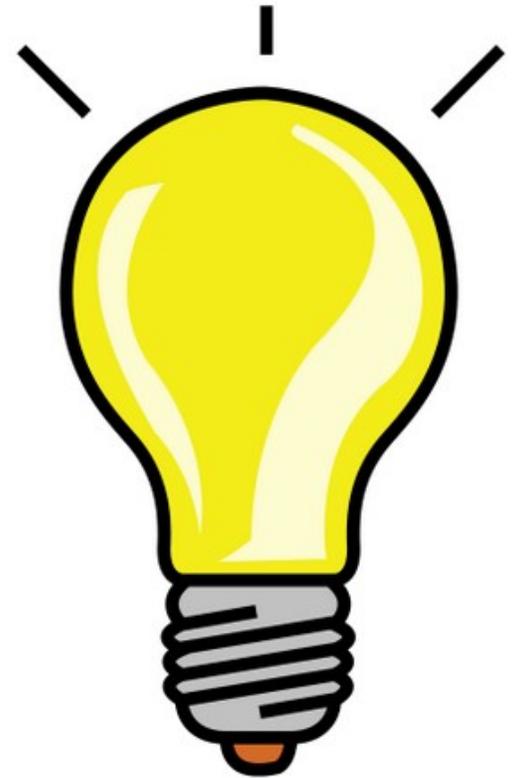
From objectives to activities



I evaluate different options and strategies and choose the one that offers the best cost/benefit ratio.

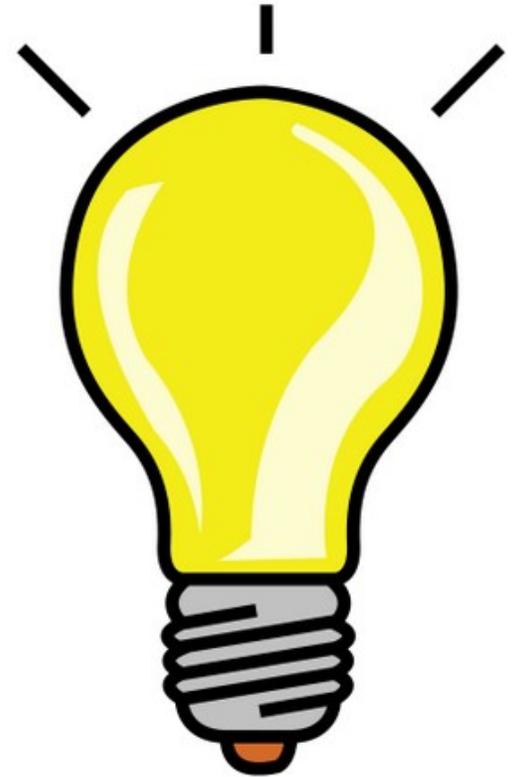
Exercise - spot the mistakes: specific objective or not?

- Promoting scientific culture among young people
- Contributing to the achievement of the Kyoto targets
- The average waiting time at the call centre is 25 seconds
- Investments in renewable energy sources in FVG increase by 25% by 2030
- Employment and competitiveness of businesses in FVG will increase



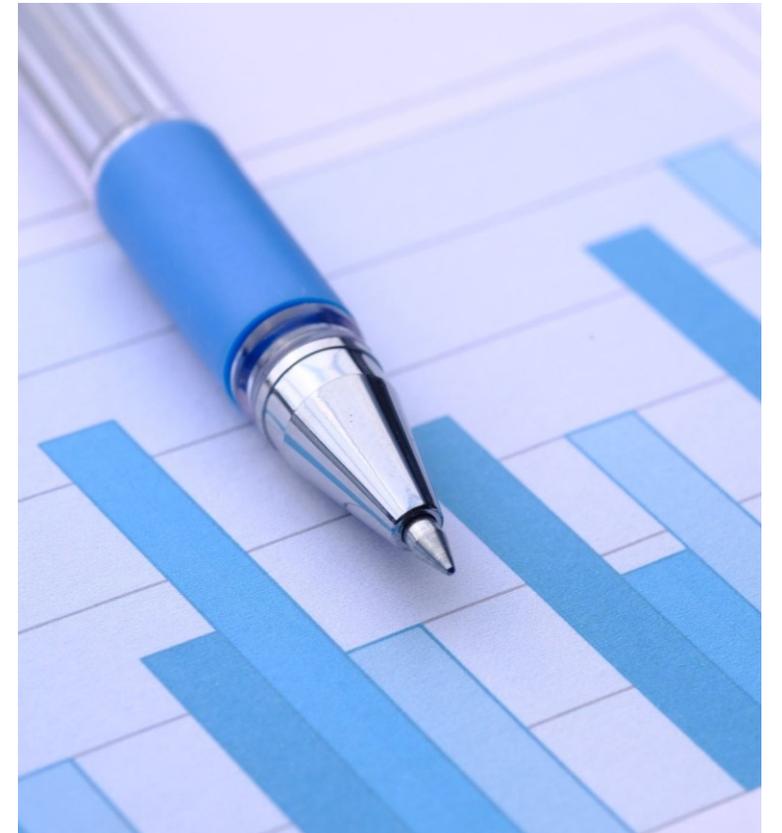
Exercise 2 – define the specific objective of the following problems

- The field is infested with pests
- The youth unemployment rate in the city of Monteverde is 17%
- Primary school children do not eat fruit and vegetables



Objectively verifiable indicators

- Indicators are a qualitative or quantitative measure of the achievement of a result or objective shared by the parties involved;
- They form the basis for monitoring and evaluation;
- They indicate how to measure the success of the project;
- They help to specify objectives and results (if they are not measurable, this is a problem);
- They indicate the target to be addressed in order to see whether an objective has been achieved.



Objectively verifiable indicators

- An indicator is a **quantitative or qualitative factor or variable** that provides a simple and reliable means of measuring the achievement of the results of an action;
- In practice, an indicator is something that can be observed in reality at the time the project and/or an action within it is carried out;
- To do this, the following must be defined:
 - a **variable**, i.e. which aspect or condition to verify (the “what”);
 - a **target group**, i.e. the territory or population of reference against which to verify the variable (“where”);

Objectively verifiable indicators

- a **verification time**, i.e. the moment when it makes sense to carry out the verification ('when');
- a **reference value** ('how much'), i.e. how much the variable must increase or decrease or what value it must assume in order to demonstrate that the project's objectives, achievements and products have been achieved.

Types of indicators

The types of indicators will be:

- For general objectives: **impact indicators**, which will depend not only on what has been achieved by the individual project but also on other factors, measuring long-term change;
- For specific objectives and results: **direct effect or outcome indicators**;
- For activities: **implementation indicators**;
- It is always useful to include the **satisfaction of the beneficiaries**.



Types of indicators

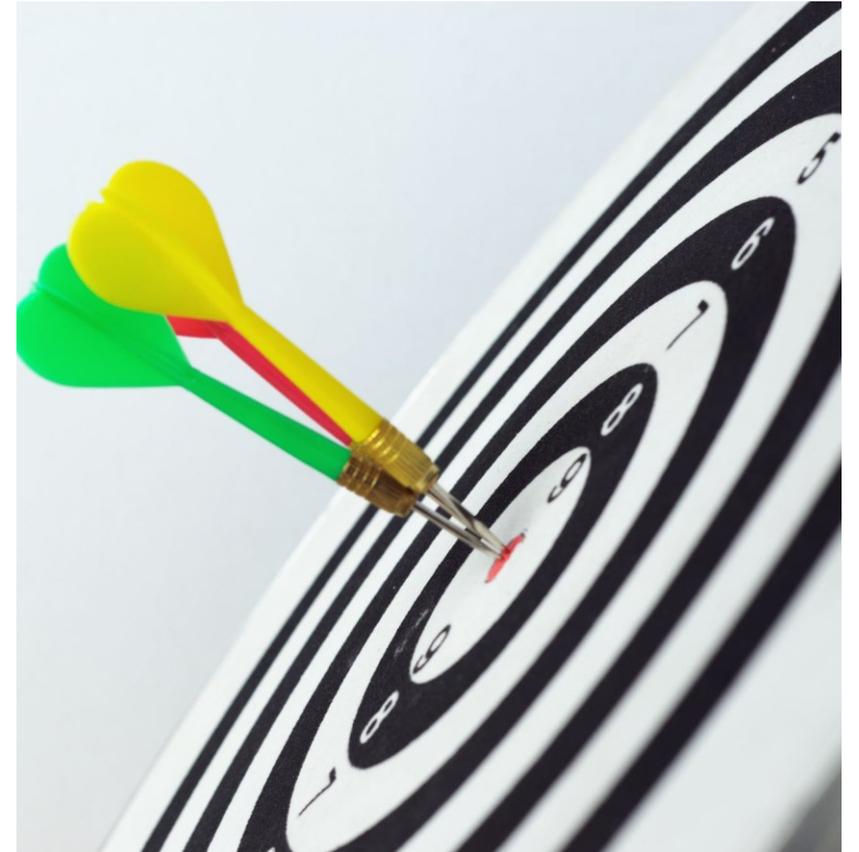
Indicators can be quantitative or qualitative.

For **quantitative indicators**, the variable can be expressed in absolute terms or percentages, indicating both the initial data and the target data.

For **qualitative indicators**, a variable must be identified that measures the perception of improvements, changes and benefits achieved.

These must be verified using tools such as field surveys, interviews with beneficiaries, etc., which must be listed in the “sources and means of verification” column.

The Logical Framework requires not only the source of verification of the indicator, but also the method used to collect the data.



Indicators: requirements



You must choose as many indicators as are necessary and sufficient to measure the achievement of a given result or objective.

The indicators must have the following characteristics:

1. **Practicality**
2. **Independence**
3. **Relevance**
4. **Objectivity**

Smart indicators



1. **Simple**
2. **Measurable**
3. **Achievable**
4. **Relevant**
5. **Time related**

QQT indicators

Once an indicator has been identified, it must be developed to include brief information on quantity, quality, time (QQT) and location.

- Quantity: how much?
- Quality: what type?
- Time: when?



Ensuring the specificity of indicators

Specific objective: **to improve health conditions**

- **Quality** (what does it describe?): reduction in mortality rates
- **Target group** (who?): reduction in infant mortality rates...
- **Location** (where?): in the North-Eastern province;
- **Quantity** (how much?): from X to Y;
- **Time** (in how long?): by the year 2030.



Verification sources

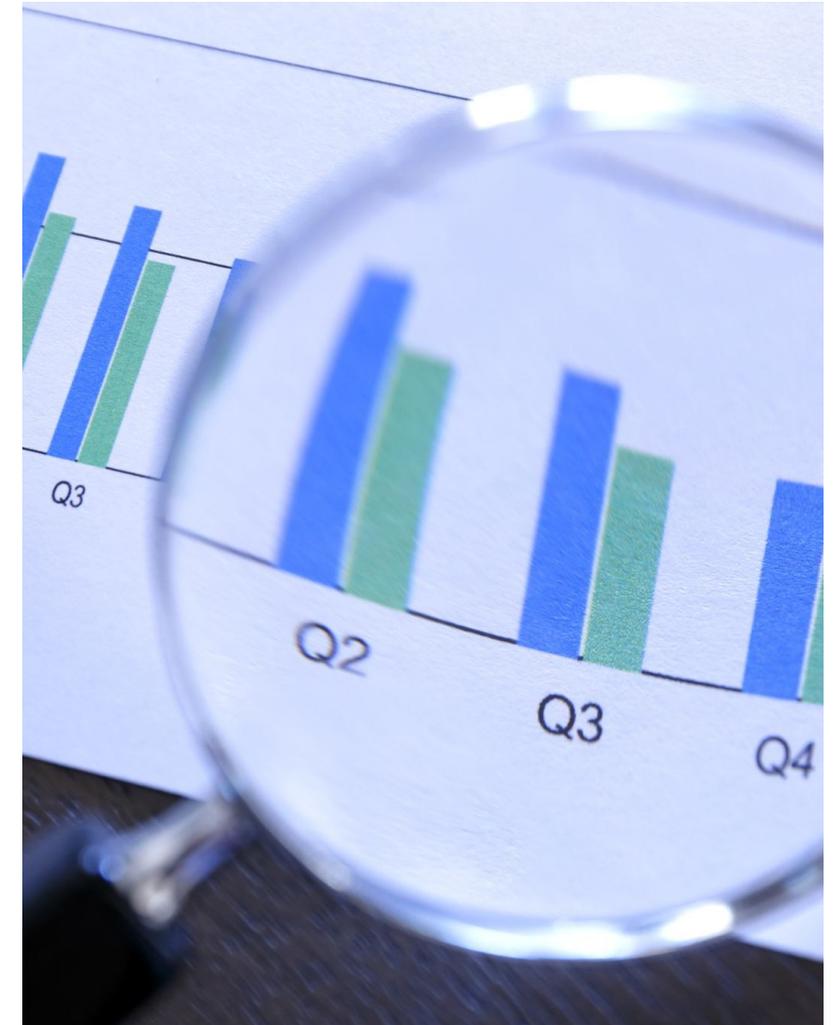
The verification sources are the methodology by which the indicators will be measured.

Data collection must be reliable and efficient (it must be carried out within acceptable timeframes and at acceptable costs).

The following must be specified:

- Who
- What
- Where
- How
- When

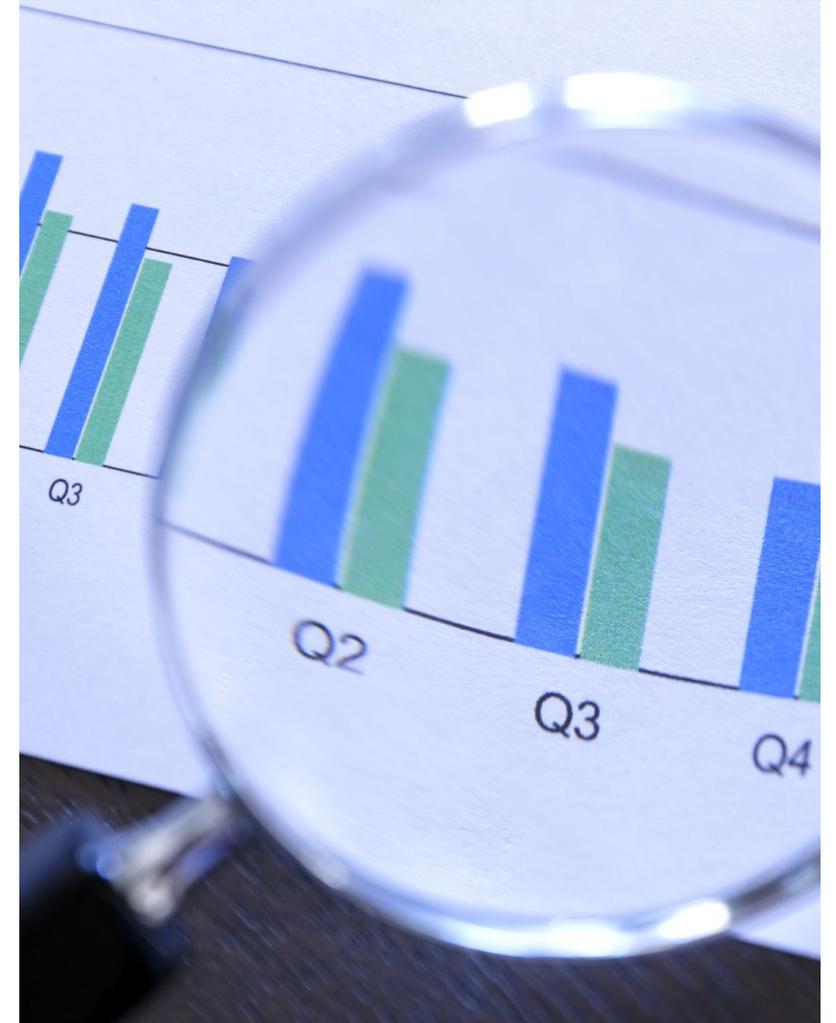
The monitoring system may become part of the project and must in any case be planned in detail.



Secondary sources

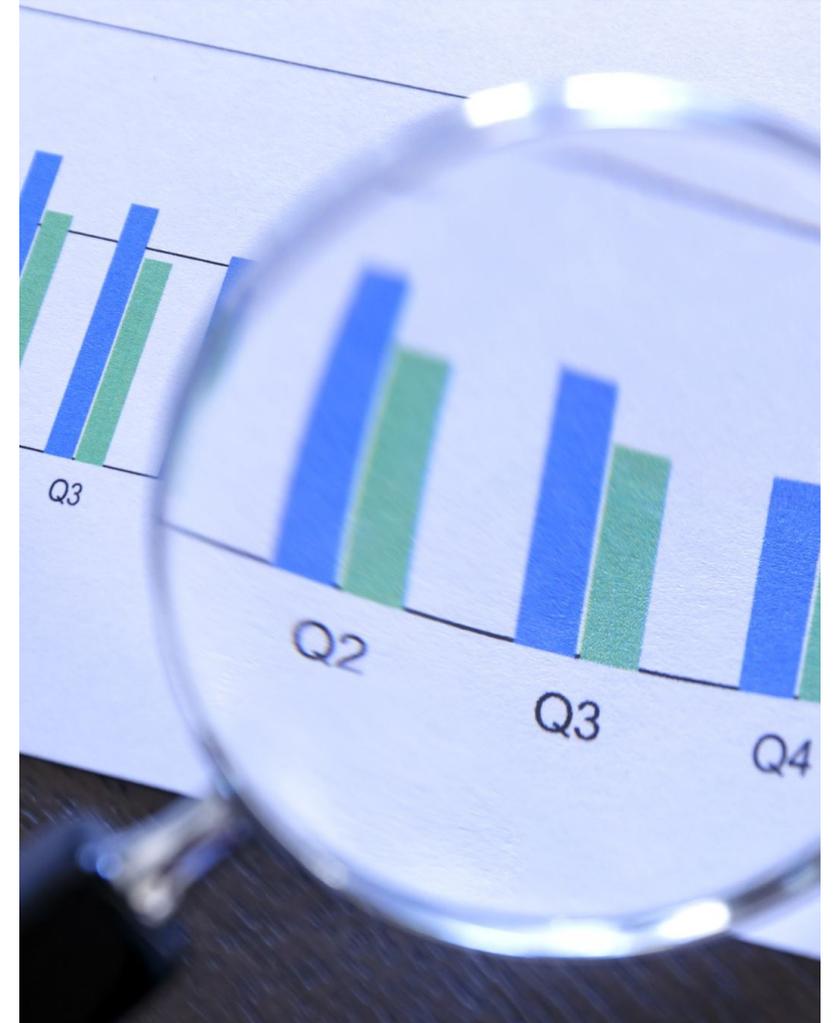
Data produced by third parties that exist independently of the project (official statistics, sector reports, accounting and tax data, monitoring by official agencies, etc.).

- They are inexpensive and easily available;
- They are often released late;
- They are impartial;
- They are often not entirely relevant.



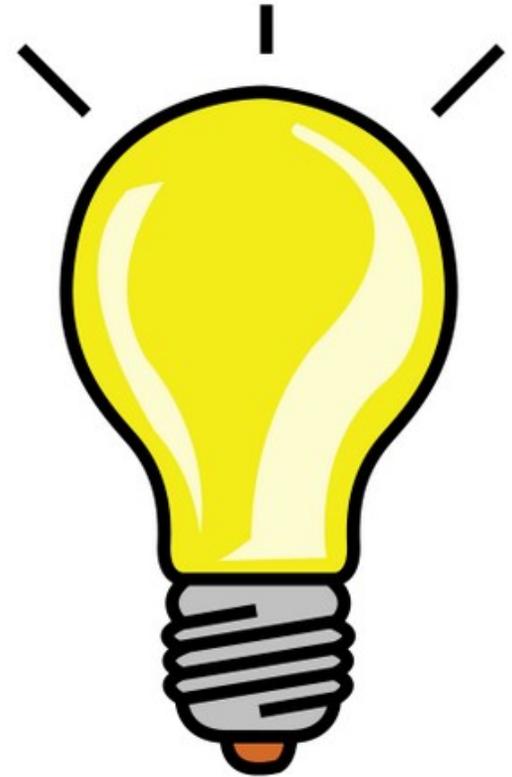
Primary sources

- Instrumental measurements, questionnaires, studies, internal surveys, etc.
- Primary sources are specific to the project and indicators;
- They may involve high costs and time requirements;
- In some cases, estimation methods may be accepted, but the methodology must be explicit and credible.



Exercise – find the indicators and specify verification sources

- Increased employment in FVG
- Greater interest among young people in scientific subjects
- Greater effectiveness of anti-cancer drug X
- Increased business competitiveness
- Reduction in the environmental impact of paint factory Y



Thank you for your attention!

Elisabetta Boglich Perasti, PhD

elisabetta.boglich@dispes.units.it

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Dr. Fabio Tomasi

Consortium for the Scientific and Technological Research Area of Trieste

