



INTEGRATION, MIGRATION,  
TRANSNATIONAL RELATIONSHIPS.  
GOVERNING INHERITANCE STATUTES  
AFTER THE ENTRY INTO FORCE  
OF EU SUCCESSION REGULATIONS.

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## ***Project Management Action Implementation Internal Guidelines***

***Kick-off meeting***  
**6st December 2018 – Florence**

**Davide Bonagurio – Project Officer**  
**Fondazione Italiana del Notariato**

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This Project is implemented  
by Coordinator



UNIVERSITÀ  
DEGLI STUDI  
FIRENZE  
DSG  
DIPARTIMENTO DI  
SCIENZE GIURIDICHE



ELTE LAW  
EÖTVÖS LORÁND UNIVERSITY



UNIVERSITAT  
DE VALÈNCIA

Centre de  
Dret de  
*Família*



Fondazione  
Italiana  
del Notariato



AMI  
Associazione Avvocati  
Matrimonialisti Italiani  
Sezione Distrettuale di Firenze



FONDAZIONE  
DE GASPERI

Partners

# *Map of content*

**1. Project implementation phases**

**3. Main activities**

**5. Project work-plan**

**7. General principles**

**2. Project objectives**

**4. Outputs**

**6. Roles**

**8. Memory**



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# 1. Project implementation phases

- **Contracting phase**  
Grant Agreement
- **Contract Implementation**  
Project Management
- **Closure**  
Reports to the EU



## 2. Project objectives (a)



### General Objective:

**To contribute to a coherent application of Family & Successions Regulations through analytical and capacity building activities targeting legal practitioners.**



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## ***2. Project objectives (b)***

### **Specific Objectives:**

**1) To contribute to the reduction of social conflicts promoting an analysis of the impact of Migration to EU Family & Successions Law: marriage laws stemming from other cultural traditions; alien contractual schemes on Family Property; discrimination connected to different degrees of recognition of family models; protection of weaker parties in family break-ups; reconciling European Laws with religious dimensions of family in other cultural traditions**



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## 2. Project objectives (b)

### Specific Objectives:

2) **Capacitate legal practitioners to handle issues linked to Migration to promote integration:** publication of peer-reviewed scientific papers and practical guidelines; development of training content for sessions in presence and e-learning course on MOOC platform; M&E and dissemination.



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## ***3. Main activities***

- **(i) publication of peer-reviewed scientific papers and practical guidelines;**
- **(ii) development of training content for sessions in presence and e-learning course on MOOC platform;**
- **(iii) M&E and dissemination.**



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## 4. *Outputs*

- (i) Questionnaire, Assessment Report;
- (ii) E-learning course;
- (ii) A book, scientific papers and practical guidelines;
- (iii) 2 seminars, 2 conferences;
- (iv) Project website;
- (v) Updated database;
- (vi) Evaluation reports and (vii) EC Reports



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## 5. Project work plan



- **Inception period (October – December 2018);**

*The aim is to facilitate start-up*

- **Implementation phase (October 2018 – September 2020) ;**

*The aim is to undertake activity implementation and monitoring progress towards achieving objectives*

- **Closing phase (Post September 2020)**

*The aim is secure what planned and report it to the EU*



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## ***Inception period (October - December 2018)***

- **Manage preliminary activities and related outputs > Work plan, Project graphic line, web site, etc..**
- **Establish Monitoring & Evaluation systems**
- **Set working relations with partners and stakeholders**
- **Hold Project kick-off among the partners and with the EC**
- **Conclude first suppliers contracting arrangements**
- **Discuss first practical cases among partners**
- **Set the basis for draft of questionnaire and experts/practitioners**



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## ***Implementation phase (October 2019 – September 2020)***

The aim is to undertake activity implementation and monitoring progress towards achieving objectives:

- **Procure and deploy resources** (financial & personnel)
- **Implement activities and deliver results:** draft the questionnaire, collect answers and draft related Assessment Report; further practical cases from the partners; organize and deliver the seminars (including materials); realize the e-learning course; conduct external and internal evaluations (2 reports)
- **Monitor and review progress internally** (each partner)



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## ***Closing phase (Avril - September 2020)***

- Ensure resources deployment as foreseen
- Ensure activities' implementation and results attainment as planned and due
- **Grant respect of EU rules and procedures**
- **Grant due visibility of results**
- Report to the EC on activity implementation(results and objectives obtained as well as costs incurred)



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# ***Project Work Plan – Chrono(WP1)***

ACTIVITIES	2018-2019		2019-2020		PARTNERS
	1ST SEMESTER	2ND SEMESTER	3RD SEMESTER	4TH SEMESTER	
	0-6 (October-March)	6-12 (April-September)	12-18 (October-March)	18-24 (April-September)	
<b>WP 1 - Management and Coordination of the Project</b>					
Draft Consortium Agreement	30 November				UNIFI
develop project logo	30 Novembre				FIN
develop project's website (general)	31 December				FIN
draft Project Management Guidelines	31 December				UNIFI-FIN
kick-off in Brussels	???				UNIFI
kick-off in Florence	5-6 December				ALL
first online general coordination meeting	1 February				UNIFI
second online general coordination meeting		1 June			UNIFI
third online general coordination meeting			1 October		UNIFI
Progress Report			31 October		UNIFI
fourth online general coordination meeting			1 February		UNIFI
fifth online general coordination meeting				10 June	UNIFI
collect/check documents for Final Report				30 September	UNIFI

# ***Project Work Plan – Chrono(WP2)***

<b>WP 2 - Preparation of the questionnaire, elaboration of data, population of the existing database</b>					
	<b>1ST SEMESTER</b>	<b>2ND SEMESTER</b>	<b>3RD SEMESTER</b>	<b>4TH SEMESTER</b>	<b>PARTNERS</b>
	<b>0-6 (October-March)</b>	<b>6-12 (April-September)</b>	<b>12-18 (October-March)</b>	<b>18-24 (April-September)</b>	
<b>Upadating mailing list for questionnaires dissemination</b>	<b>28 February</b>				<b>ALL</b>
<b>disseminate questionnaires</b>	<b>29 March</b>				<b>ALL</b>
<b>first deadline for answers</b>	<b>30 April</b>				<b>ALL</b>
<b>second deadline for answers</b>		<b>31 May</b>			<b>ALL</b>
<b>assessment report / evaluation questionnaires</b>		<b>28 September</b>			<b>UNIFI</b>
<b>list of controversial country-based issues</b>		<b>28 September</b>			<b>UNIFI</b>
<b>update case-law database</b>		<b>28 September</b>			<b>UNIFI-FIN</b>

# ***Project Work Plan – Chrono(WP3)***

<b>WP 3 - Drafting new scientific papers and the practical guidelines</b>				
<b>drafting scientific papers and practical guidelines</b>			<b>30 May 2020</b>	
<b>identify limited number of case studies</b>			<b>29 March 2020</b>	<b>UNIFI</b>
<b>editing Final Book</b>			<b>30 September</b>	<b>UNIFI</b>



# **Project Work Plan – Chrono(WP4)**

<b>WP 4 - Organisation and delivery of the training activities and the e-learning course</b>					
Opening conference on training	5 December				UNIFI
website pages on training	30 November				FIN
develop web page for first seminar	31 January				FIN
Iberian Seminar	To agree	To agree	To agree	To agree	ELTE
upload training materials on web page	Permanent	Permanent	Permanent	Permanent	ALL
first uploading of the internal evaluation table		30 April			FIN
develop web page for second seminar		15 September			FIN
draft e-learning course programme		28 September			FIN
Hungarian Seminar	To agree	To agree	To agree	To agree	FIN
draft the second internal evaluation table			30 November		FIN
e-learning course recording			31 January		FIN
develop web page for the Final Conference				31 July	FIN
draft the third internal evaluation table				15 May	FIN
internal evaluation report				31 May or 30 June	FIN
e-learning course completion to be uploaded on MOOC				31 July	FIN
final conference in Brussels				To agree	UNIFI

# Project Work Plan – Chrono(WP5)

WP 5 - External evaluation							
send Project materials to evaluators				30 June or 31 July			
Mid-term Evaluation Report					31 October		FIN
send Project materials to evaluators						30 June	FIN
Final Evaluation Report						30 September	FIN

## ***6.Roles and responsibilities(a)***

- **Work-stream 0 – Project management (resp. UNIFI)**
  - UNIFI – regular management, coordination and communication (coordination meetings); prepare Consortium Agreement; draft final reports to EC;
  - FIN – create & manage web site, Project implement. Guidelines
- **Work-stream 1 – Preparation of the questionnaire, elaboration of data, population of the existing database(resp. UNIFI)**
  - UNIFI – draft questionnaire (Q) and feed the database
  - ALL PARTNERS – Mailing List, translate and disseminate Q, collect answers, publish Q
  - UNIFI – draft Assessment Report



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## ***6.Roles and responsibilities(b)***

- **Work-stream 3 – Drafting new scientific papers and the practical guidelines (resp. UNIFI)**
  - ALL PARTNERS – To identify relevant case studies. About 10 cases for each country of the partnership (50 in total);
  - UNIFI – research/analysis, select practical cases, draft, peer-review & publish papers; draft & edit final book. Practical guidelines on Cultural Mediation in Family and Succession Law.
- **Work-stream 4 – Organize and deliver training activities and the e-learning course (resp. FIN)**
  - FIN – develop and manage registration web pages; supervise training programmes and activities; Internal evaluation; realize the e-learning course
  - ALL PARTNERS – deliver training sessions; prepare 2 seminars and 2 conference materials; contribute to internal evaluation and e-learning course’s modules preparation



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## ***6.Roles and responsibilities(c)***

- **Work-stream 5 – Evaluation of project main activities implementation and preliminary impact (resp. UNIFI)**
- FIN – evaluation of:
  - implementation and impact of the training sessions;
  - research activity, published papers, practical guidelines and the Book;
  - the e-learning course
- ALL PARTNERS – submit all useful information to the evaluator



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# 7. General Principles(a)

- **Project management** means organizing and managing project resources (time, costs, people, equipment, space, relationships etc.)

The aim is to reach set objectives and deliver expected results in a timely, accurate and efficient manner

Constraints of various nature need to be dealt with and risks reduced as far as possible

## Main tasks:

- Maintain progress
- Maintain productive mutual interaction of parties
- No additional activities are to be undertaken, if not first communicated EC in writing (unless they do not involve planned costs and are justified)



# 7. General Principles(b)

## Project Manager's roles and responsibilities

- Plan activities / design work-plan and time-line to be followed
- Analyze and design objectives (log-frame, if required)
- Revise the work plan considering progress
- Ensure co-funding and sustainability
- Estimate resources and allocate them
- Schedule activities and time management
- Organize the work
- Acquire human and material resources
- Direct activities and assign tasks / delegate work
- Monitor project execution/internal evaluation as required
- Report progress, communicate and manage public relations / with the EC
- Analyze results based on objectives met



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## *8. Last but not...least*

- ❖ follow the Consortium Agreement
- ❖ comply with the Grant Agreement
- ❖ use the EU Management Guide
- ❖ pay attention to UNIFI Project Management Guidelines...

...and to the present Action Implementation Internal Guidelines



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