TECHNICAL CROSSBORDER DEMONSTRATION PLAN

Methodological document

AGENDA

Table of contents:

- The purpose of the action plan
- The ATLAs project and the pilot actions
- The action plan model

THE PURPOSE OF THE ACTION PLAN

One of the distinctive elements of the ATLAs project is its operational approach aimed at the development of new business models that combines technological innovation, culture and tourism.
In such context, **ATLAS project partners, with some primary stakeholders, identified** pilot actions (demonstration actions) **aimed at support the development of an economy based on culture and tourism.**

- An **action plan** is the methodological tool that defines common standards for the development and management of pilot actions (or pilot projects).

- In particular, the action plan encompasses the **project's development phases**, from its conception to its implementation and evaluation, according to the action plan model (see next page).

- Drawing back from the action plan model, this document also provides guidance for the ATLAS project partners for demonstration of their own pilot actions with the final aim to promote an uniform and consistent demonstration action.

THE ATLAS PROJECT AND THE PILOT ACTIONS

The main scope of the ATLAs project is to foster technology innovation in cultural and natural heritage management to enhance competitiveness for local economic development. Each ATLAs partner (8 in total) is developing a pilot action to help reach the project purpose.

Common goals of pilot actions are:
- to test innovation in cultural and tourism management;
- to develop new metodologies for project development and implementation;
- to test innovative products and services in cultural tourism.

A keyword analysis allows to make a recognition of the main themes adressed by the pilot projects, as shown in the figure on the right (a tag cloud).

ATLAS project identifies four main topics (see next page) that pilot projects can relate to (one or more). These are:
- digital and virtual tourism;
- accessibility;
- tourism experience;
- enhancement of cultural heritage.

THEMES ADDRESSED BY THE ATLAS PILOT PROJECTS

SEASONALITY AND DIVERSIFICATION

DESTINATION AWARENESS

SUSTAINABILITY

ACCESSIBILITY

CULTURAL AND TOURISTIC PRODUCT INTEGRATION

REAL LOCAL LIFE EXPERIENCE

VALORIZATION AND PROMOTION OF RURAL / INTERNAL AREAS

NEW CULTURAL PATHS & INTERCONNECTION

LOCAL PRODUCTS

SLOW TOURISM

THE ATLAS PROJECT AND THE PILOT ACTIONS

Each pilot project focuses on one or more of the four main ATLAs topics, as detailed in the table here below.

PROJECT PARTNER	DIGITAL AND VIRTUAL TOURISM	ACCESSIBILITY	TOURISM EXPERIENCE	ENHANCEMENT OF CULTURAL HERITAGE
LP FRIULI INNOVAZIONE (ITA)	✖	✖	✖	✖
PP1 IDA (HR)		✖	✖	
PP2 SIPRO (ITA)	✖	✖	✖	✖
PP3 TECNOPOLIS (ITA)		✖		
PP4 PUGLIA CREATIVA (ITA)	✖	✖	✖	✖
PP5 UNIPU (HR)		✖	✖	
PP6 UNIONCAMERE (ITA)		✖	✖	✖
PP7 STEPRI (ITA)			✖	✖

THE ACTION PLAN MODEL

The document is structured following the action plan model, which distinguishes six subsequent phases within the process of the project development.

This document is hence composed of six sessions, one devoted to describe each of these steps.

For each session, a brief methodological overview is provided, along with a **WHAT TO DO** box that explains what is expected to be produced for the project demonstration.

INTERNAL AND CONTEXT ANALYSIS — 1

IDENTIFICATION OF THE MISSION — 2

DEFINITION OF STRATEGIC OBJECTIVES — 3

STRATEGIC PLANNING — 4

OPERATIONAL PLANNING — 5

MONITORING — 6

ACTION PLAN

1. INTERNAL AND CONTEXT ANALYSIS

OBJECTIVE | *To identify significant information - both internal and external to the organization - for strategic planning of the pilot action and identify the project's target market(s)*

SITE DESCRIPTION

WHAT TO DO

Identify and describe the internal elements that contribute – positively or negatively - to the cultural and touristic experience and the extent to which each of them impacts on it
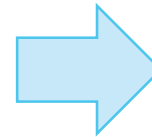
Location and history
Specify the type of site chosen for the project implementation also referring to its original historical and cultural context.

Characteristics and features
Describe what makes the site a (potential) point of historical, natural, cultural interest for tourism.

Provide a brief overview of the selected site(s)in which the project is implemented and capture all information that is relevant to the project demonstration

Site-related permits and regulations
Enucleate whether the site is subject to specific regulations to consider during the project design process and implementation of activities

1. INTERNAL AND CONTEXT ANALYSIS

In order to build a consistent medium-term strategy it is necessary to previously understand the characteristics of the socio-economic and territorial context in which the project is implemented and on which its planned actions produce their own impact.

EXTERNAL ANALYSIS

Desk analysis
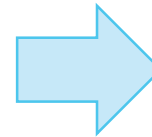Provide relevant data from existing statistics and sources

Policies and programmes
Explain national and local policies, regulations and programming documents that may affect project success

Stakeholder map
List and classify all persons, groups and organizations possibly interested or concerned by the project activities and/or results.

WHAT TO DO

Describe the key issues that the project addresses and its impact(s) on the overall tourist/visitor experience

Identify short-, medium- and long-term opportunities and challenges faced by the project

1. INTERNAL ANALYSIS AND CONTEXT ANALYSIS

A key scope of this phase is the identification of one or more target market(s) of the project, i.e. the selected group(s) of consumers for which the product(s) or service(s) resulting for the project is intended, hence the most likely to use (and to pay for) such product(s) or service(s) .
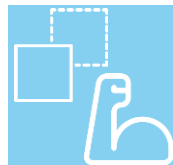
TARGET MARKET DESCRIPTION

Market analysis
Detect and outline project's market size, target groups (segmentation), benefits sought and further opportunities
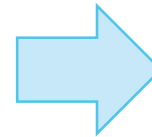
Technology and innovation provided
Analyse actual levels of technology use and adoption in the sector/market (familiarity), Disruptive vs. incremental innovation

Replication and competition
Assess exploitation potential in similar sites or sites that are located in proximity; availability of similar products/services.

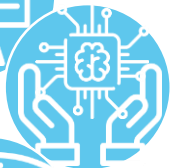**WHAT TO DO**

Explain the reason(s) behind the market choice

Identify the added value brought to the market by the project and its underlying technology

Describe what type of actions and activities are already carried out in that site (or similar ones) for that market

IMPORTANT

Consistent data and figures should be used to best support the description

1. INTERNAL ANALYSIS AND CONTEXT ANALYSIS

Once the features of the internal environment and the context in which the project is to be implemented have been exposed and its target market identified and outlined, it is important to give an initial, short description of the project including all the possible details and view on the scope and scale of the project.

WHAT TO DO

Write a project brief that outlines a summary of your project idea

KEY ELEMENTS OF A BRIEF

- Why is your project being undertaken?

- What is the background of the problem that has prompted to come up with the project concept?

- What is required for the project design and realization?

- What are the goals?

- What resources are available?

- Who is involved in the project?

- When does the project start and finish?

- Where and how is the project be carried out?

- What are the time frames for the completion?

2. IDENTIFICATION OF THE MISSION

To define the long-term main purpose – the "why" - of the pilot project
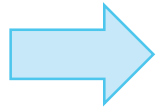
The mission is a statement capable to explain the main reason for implementing the project and carrying out the related activities.

WHAT TO DO

Write a mission statement that answers the following question:

? *What does the project do, how does it does it, and why does it does it?*

MAIN FEATURES OF A MISSION STATEMENT

A mission statement *should be*:

REALISTIC   reasonably achievable and coherently targeted

DISTINCTIVE   unique, specifically conceived for the project and capable to make it recognizable

CLEAR   self-explaining, as well as brief

CONSISTENT   with the strategy and capable to communicate its major components

OUTCOME-ORIENTED devoted to successful project completion (improvement vs. current situation)

3. DEFINITION OF STRATEGIC OBJECTIVES

OBJECTIVE | *To transform critical issues, policies, challenges that emerged as findings from the context analysis into objectives that the projects aims to achieve, in line with the mission of the project*

Strategic objectives *set* the organization's plan in order to achieve the project's mission. They constitute a fundamental element of the overall project strategy and are of primary importance for the strategic planning.
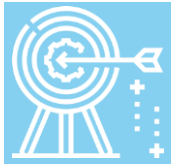
Project's **strategic objectives** are long-term cultural, social and economic benefits to which the project contributes.
Strategic objectives should be specific, concrete and SMART

SMART MODEL
CHARACTERISTICS OF OBJECTIVES

- **S** specific
- **M** measurable
- **A** achievable
- **R** realistic / relevant
- **T** time bound

As for the mission, strategic objective *statements* are short sentences used to define each objective's intent and meaning

WHAT TO DO

Clearly formulate coherent and SMART project strategic objectives to state what to achieve with the project in order to face the key issues

4. STRATEGIC PLANNING

To identify and plan the most effective strategy in order to achieve the project's strategic objectives
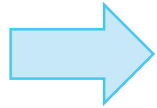
Strategic planning involves shaping a direction for the organization formulating strategies to pursue strategic objectives as in line with the mission statement and obtain the project results.

Strategy is referred to as the **essential methodology** used for carrying on the project to ensure the entailment of the project mission.

WHAT TO DO

Determine what is needed and what has to be done to achieve project's strategic objective

Define all results expected from the project (*see next page*)

WHERE ARE WE NOW?

WHERE DO WE WANT TO BE?

HOW DO WE GET THERE?

INTERNAL AND CONTEXT ANALYSIS

MISSION AND STRATEGIC OBJECTIVES

STRATEGY

NOTE: The Strategic Plan does not detect and explain tasks and activities involved in developing and running the project, as this is the purpose of the Operational Plan (*see section 5*), but the former is crucial in order to draw up the latter.

4. STRATEGIC PLANNING

FOCUS ON: **Project implementation and results**
In order to achieve desired long-term goals, there are many steps between actions taken and the desired impact.
Before and during project implementation, work plan and control is concentrated on inputs and activities.

INPUT	Financial, human, and material resources used for project development and realization	i.e. money, staff and technical expertise, supplies, facilities and equipment
ACTIVITIES	Work and actions planned and necessary to execute the project and achieve its set goals	what the project does to achieve results (*see next page*)
OUTPUTS	Products and services *directly generated* by a project activity (or group of activities).	
OUTCOMES	The likely or achieved short-term and medium-term effects of the project outputs	
IMPACTS	Positive and negative, primary and secondary long-term effects produced by the project, both direct / indirect, intended / unintended.	

4. STRATEGIC PLANNING

FOCUS ON: **Project implementation and results**

Every project, when implemented, generates direct and indirect results, namely: outputs, outcomes and impacts.
When performing project planning, it is important to state *intended* results that the project aims to accomplish.
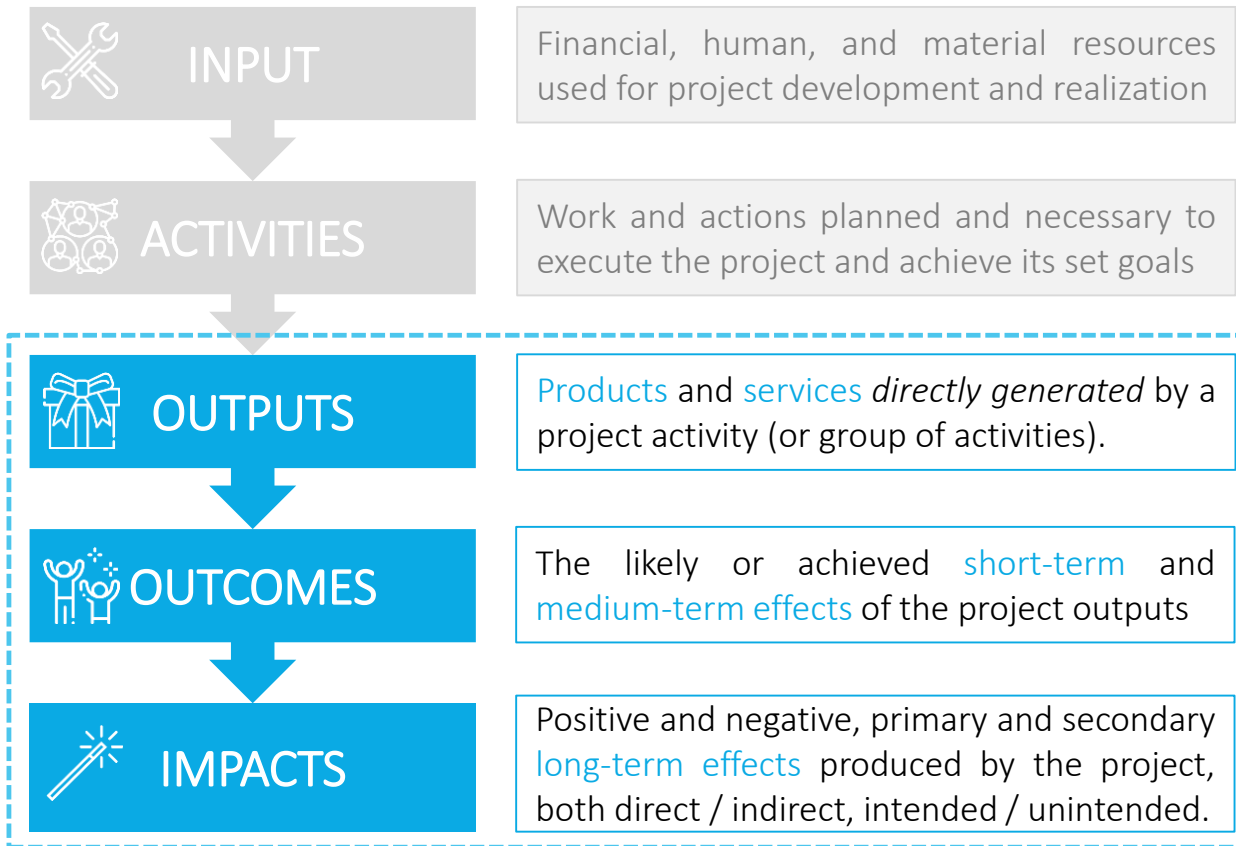
INPUT	Financial, human, and material resources used for project development and realization
ACTIVITIES	Work and actions planned and necessary to execute the project and achieve its set goals
OUTPUTS	Products and services *directly generated* by a project activity (or group of activities).
OUTCOMES	The likely or achieved short-term and medium-term effects of the project outputs
IMPACTS	Positive and negative, primary and secondary long-term effects produced by the project, both direct / indirect, intended / unintended.

NOTE: **Outputs** are usually tangible (or easily identifiable and detectable in any case) and measurable.

Outcomes - deriving from project outputs – constitute the reason why the project exists. They are less tangible and measurable.
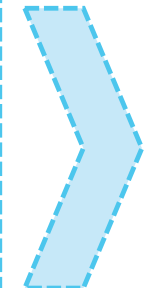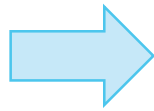
Achieving project outputs does not automatically entail the achievement of the project outcomes.

5. OPERATIONAL PLANNING

OBJECTIVE

To identify and define the most effective set of operational activities (actions) in order to implement and execute the project strategy and achieve the project's plan, outputs and outcome

The Operational plan is a tool that focuses on project implementation, namely on inputs and activities (*see next page*), and facilitates co-ordination and allocation of the human, physical and financial resources involved in the project to achieve the strategic plan. It is meant for the project daily management (day-to-day work), hence set for the short-term.

THE OPERATIONAL PLAN:

pinpoints and lists all actions and practical activities to undertake for the project realization.

assigns tasks and responsibilities to every person involved in the project, providing them with a full description of each.

allocates financial resources to each task within existing budget constraints.

sets operational objectives (*see next page*) and Key Performance Indicators (KPIs)

illustrates a project timeline and sequence for the starting, duration and termination of actions and activities

WHAT TO DO

Write an operational plan that identifies, organizes and *fully* details resources and activities, project operational objectives and actions (*see next page*), tasks and responsibilities, budget and timing for each action

16

5. OPERATIONAL PLANNING

Project's **operational objectives** are tangible and short-term benefits that recipients (and stakeholders in general) get from carrying out the planned actions and activities in the Operational plan. A project is capable to achieve strategic objectives only if operational objectives have previously been met.

> Operational objectives are directly connected to the project strategy and to strategic objectives: each strategic objective is assigned a set (one or more) of operational objectives; actions are planned to be performed in order to respond to and achieve operative objectives.

STRATEGIC OBJECTIVE → OPERATIONAL OBJECTIVE(S) → ACTION(S)

OPERATIONAL OBJECTIVES:

- allow for performance measurement and evaluation
- give orientation for the realization of day-to-day activities and operations (actions)
- provide (additional!) motivation to staff and all people involved in the project toward the reach of common goals (it also promotes teamwork!)

Operational objectives should be reachable in the short term and specific.
NOTE: The SMART model is applicable for operational as well as for strategic objectives (*see section 3*)

5. OPERATIONAL PLANNING

FOCUS ON: Project budgeting

Project budgeting consists in combining costs for all planned actions/activities for the project accomplishment.
Budget is crucial because it drives project funding and provides the basis for cost control activities.
Table here below illustrates a budget template for a project.

		Cost calculation	Labour		Material		Services		Other costs		Budget (A)	Actual cost (B)	Balance (B-A)
			Hour	Hour rate h/€	Units	Unit rate h/€	Units	Unit rate h/€	Units	Unit rate h/€			
1	Action 1		- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
1.1	Task 1		- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
1.2	Task 2		- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
1.3	Task 3		- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
1.3.1	Sub task 1		- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
1.3.2	Sub task 2		- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
1.3.3	Sub task 3		- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
2	Action 2		- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
3	Action 3		- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
n	Action n		- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
	Subtotal	St = $\sum_1^n$ Action	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
IC	Indirect Costs		- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
GT	Grand Total	GT = St + IC	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €

FOCUS ON: **Project timing**

Project timing is about scheduling all activities and actions related to the project in order to deliver the planned results on time.

An useful tool for project timing and planning is a Gantt chart, a type of bar diagram that illustrates a project schedule expressing the duration of each action and sub actions – on the vertical axis - via the width of the horizontal bars (horizontal axis illustrates time, generally expressed in weeks). Gantt charts can also illustrate % of schedule completion and dependency relationships between activities.

	week	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	…	n	% complete
1	Action 1	■	■	■	■	■	■	■	■	■														
1.1	Task 1	■	■	■	■	■	■																	
1.2	Task 2	■	■	■	■	■																		
1.3	Task 3					■	■			■														
1.3.1	Sub task 1					■	■																	
1.3.2	Sub task 2							■	■															
1.3.3	Sub task 3								■	■														
2	Action 2								■	■	■	■	■											
3	Action 3										■	■	■	■	■	■	■							
n	Action n																■	■	■	■	■			

6. MONITORING

OBJECTIVE

To gather information on all aspects of the project and to interpret the project results - from the point of view both of the direct and indirect beneficiaries – in order to detect whether or not the intended objectives have been met and eventually take corrective actions
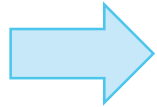
The process of measuring progress through reporting permits to eventually adjust and adapt the operational plan – in the short-term – and to review and revise the strategic plan – in the medium- and long- term, with the final aim to ensure successful completion of the project and to minimize the risk of failure

The monitoring process consists in the continuous assessment of the project with reference to the plans.

As a management tool, when used properly, it processes and reports ongoing information on the project implementation, allowing for the identification of potential successes and constraints and to facilitate decisions regarding the management of the project.

Objectives and **indicators** provide the basis for evaluating the project performance, playing a fundamental role in the monitoring process; hence, they are crucial for an adequate project demonstration action and, finally, for the project validation.
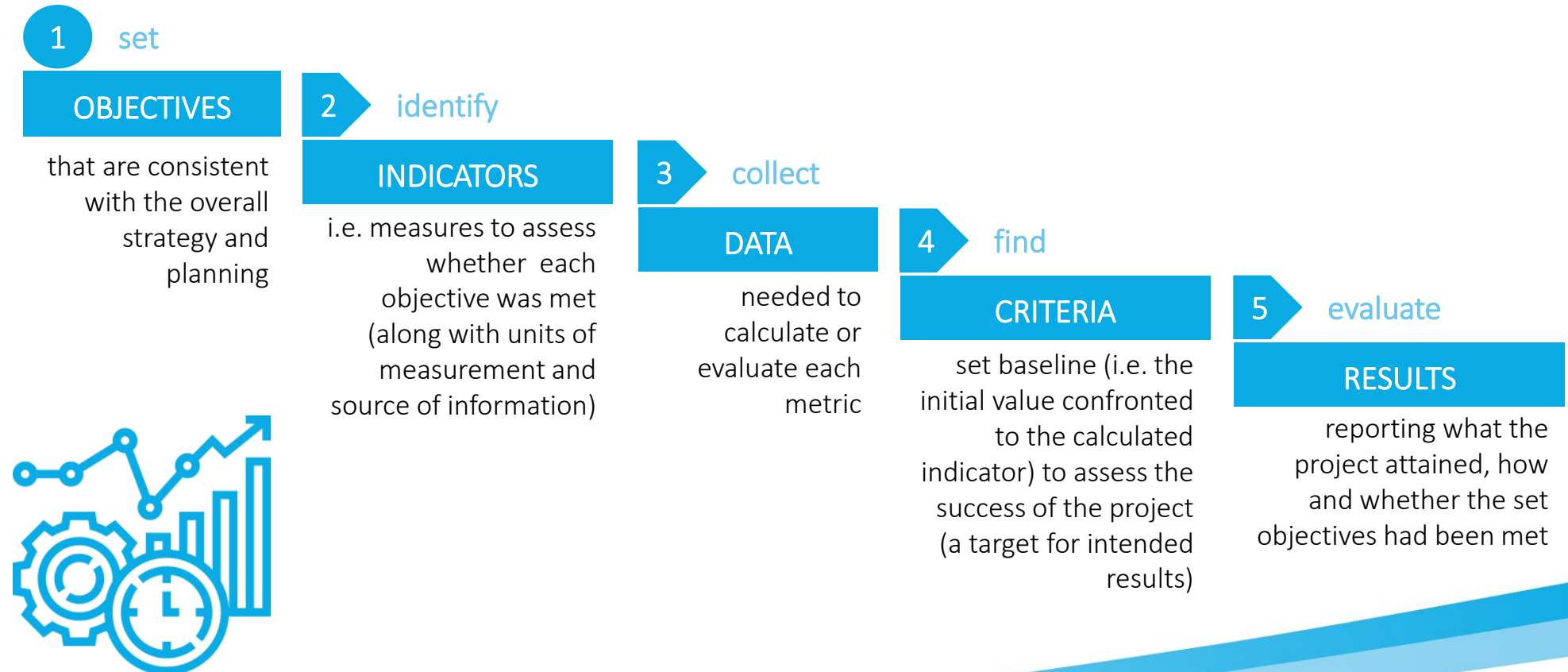
WHAT TO DO

Write a monitoring plan illustrating the monitoring process and the indicators for the different objectives and actions

NOTE: the monitoring plan is designed *before* starting the implementation the project.

6. MONITORING

Once objectives have been broken down into *key activities*, the need is to define how to track performance, progression and results of activities as well as the main impact of the project: key performance indicators (KPIs) allow for measuring results agreed during planning.

1 set

OBJECTIVES

that are consistent with the overall strategy and planning

2 identify

INDICATORS

i.e. measures to assess whether each objective was met (along with units of measurement and source of information)

3 collect

DATA

needed to calculate or evaluate each metric

4 find

CRITERIA

set baseline (i.e. the initial value confronted to the calculated indicator) to assess the success of the project (a target for intended results)

5 evaluate

RESULTS

reporting what the project attained, how and whether the set objectives had been met

6. MONITORING

The **performance objectives** are a fundamental component of the project demonstration, as they provide the basis for evaluating the general project performance: hence, the correct formulation (*ex ante*) and the meeting (*ex post*) of such objectives is crucial for successful project demonstration (and validation).

For **resources monitoring**, the focus is on input indicators, i.e. the amount of inputs allocated and used to obtain outputs, while activity indicators are essential in order to understand the extent to which a project was delivered as planned, and to highlight obstacles to implementation.

For **results monitoring**, indicators are designed with relation to *intended* results. While output indicators are useful to evaluate process efficiency, outcome indicators are the ultimate measure of result attainment, as outputs do not reflect the changes in the beneficiaries provided with the project and impacts are usually complicated to tackle and too long-term for performance monitoring. That is why it is important to develop observable and measurable outcomes; note that outcome can be intermediate or final.

Indicators can be either quantitative or qualitative. Quantitative indicators point a *quantity* i.e. a pure number, an index, ratio or percentage; they give a very clear measure of things and are numerically comparable.

Qualitative indicators, lacking a direct relationship to specific units of measure, depict the status of something in more of qualitative terms but can be graded via qualitative findings (notably using scales).

6. MONITORING

Example of monitoring plan:

Objective	Field	Indicator	Type of indicator	Information needed	Data source(s)	Method(s) of data collection	Frequency of data collection	Criteria of evaluation
strategic / operational goal(s) to which the indicator relates	*related to project implementation process input / activity / output / outcome / (impact)*	*name and provide a brief description of the indicator*	*qualitative / quantitative*	*list and describe the information used to calculate indicators*	*desk / field analysis; name sources used to get data*	*describe the approach(es) used to collect data*	*set how often data should be collected to perform the calculation of the indicator*	*describe the reference target to which compare the calculated result for the indicator*

? *How to document and evaluate the project (intermediate and final) results?*

WHAT TO DO

Reporting enables gathered information to be used in making decisions for improving the project performance.
Indeed, monitoring also involves giving feedbacks about the progress of the project to the funder, implementers and beneficiaries of the project.
Moreover, once the project comes to an end, results should be written down in a final report in order to clearly state whether the project accomplished or not its main scope(s), what else it eventually accomplished (not included in project planning) and how.

Write periodical reports during the implementation of the project primarily addressed to the person(s) in charge of planning revision

Produce and circulate a final report at the completion of the project to disseminate methodology and results