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Guide for Trainers

Developing and Managing EU-Funded Projects

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Foundation in Support of Local Democracy
www.frdl.org.pl

Partners Foundation for Local Development
www.fpdl.ro

Guide for Trainers

Developing and Managing EU-Funded Projects

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Introduction

Introduction

This Guide for Trainers is an online resource to accompany TACSO's Manual on "Developing and Managing EU-Funded Projects". The aim of the Guide for Trainers is to demonstrate a range of methodologies and tools that can be used in many different types of learning activities for CSO managers, staff, local trainers and consultants who are interested in helping and enabling CSOs gain access to, and manage, EU funds. The Guide for Trainers also builds on the references made in the Manual by providing access to guidelines and templates related to EU grant applications, as well as to links for further information on EU funding for CSOs in the Western Balkans and Turkey.

The Guide for Trainers is organised in the following way. There are six sections, from Section A to Section F, corresponding to the six sub-sections used in the Manual to highlight the most important areas on which CSOs wishing to access and manage EU funding should specifically concentrate.

These sections are:

- Identifying EU funding opportunities for your organisation;
- Developing effective partnerships for projects;
- Preparing successful project proposals;
- Passing the evaluation - an insider's guide;
- Managing EU Grant Contracts;
- Compliance monitoring and reporting on EU funds.

Within each section the materials are organised as follows:

i. **Training Preparation** - a short introduction to each section to give some ideas about how to prepare training activities on the topic, along with a standardised 'training session plan' template:

Learning Objectives	What do we want participants to learn?
Methodology	How are we going to achieve the learning objectives?
Timing	How long will the training activities take?
Tools	What training tools are we going to use?
Other Resources	What other resources (such as equipment) will we need to deliver the training?
References	What are the 'further reading' references?

ii. **Tools: Presentations** - here you can find sample text and illustrations for Powerpoint slides and recommendations for use of flip charts and other presentation tools;

iii. **Tools: Handouts** - a few samples of short handouts (usually 1 or 2 A4 pages) which can be copied and given to training participants in support of presentations;

iv. **Tools: Exercises and Templates** - these are instructions on how to run practical training exercises, including any 'case study' notes or templates that participants might need to complete the exercise.

Finally, there is a Glossary of Terms and a list of References.

How to Use the Guide

The Guide for Trainers is designed to be used in conjunction with the Manual by a range of people: trainers, CSO staff and consultants. The instructions are not comprehensive, but rather are provided as a guide for readers who are expected to have had some prior experience as a trainer or facilitator. It should also be noted that the suggested tools and methodologies are best used as the foundation to a training course and need to be supplemented with additional training activities and materials in order to meet the expectations of any given group of trainees. Thus, in addition to what is provided in the Handbook, prior to organising any training activity on the subject of 'Developing and Managing EU-funded Projects', users of the Guide for Trainers should consider the following assessment questions and context of the training.

Assessing Training Needs

- Any training activity should be clearly designed against a set of agreed learning objectives, and such objectives can only be set if the needs of the target trainees and participants have been assessed;
- when considering the development and management of EU-funded projects, identify the capacity needs of potential trainees in terms of their existing Knowledge, Skills, and Attitude;
- if the target group for the training has no knowledge or experience generally of 'the project approach' and project management, it is advisable to first run a training course on Project Development, before focusing specifically on EU-funded projects;
- if the target group is strong on Project Development, then it is best to focus more on the specific aspects of EU-funded projects (Sections A, D, and E) rather than on the project proposal sections;
- the contents of the Guide for Trainers can be used to design and deliver training activities of varying lengths - from individual sessions of just 60-90 minutes, to a full training course of up to 5 days. Thus, once the training needs have been assessed, it is advisable to draft a clear training strategy, considering all available resources, in order to identify exactly when and for how long any training might be given.

Consideration of Training Context

- Be clear on how many people are going to be trained and in what context, be it on the job, in a workshop or a formal training seminar. This will influence the choice of tools required, such as Powerpoint presentations or flip charts, and the use of exercises;
- make sure you have reviewed and have access to any relevant local training materials on this topic. For example, in addition to the Case Studies and Samples used in this Manual and Toolkit, it is good to generate and use real, local materials on EU-funded projects (such as recent local Calls for Proposals, completed Application Forms and logframes of local or specific sector projects.);
- many Calls for Proposals require that documentation is submitted to the EU in English, thus it is important to consider the language context of the training. What level of English do the trainees have? How much material needs to be translated into any given national language?
- if the training is in support of a specific Call for Proposals, make sure that all the reference points in the training and all the exercises directly relate to the requirements of the Call. (For Example, when looking at issues of Partnership, refer directly to any partnership expectations in the Call, and when working out how to pass the evaluation, make direct use of the Evaluation Grid as published with the Call).

Identifying Funding Opportunities

Training Preparation

Helping CSOs to understand how EU funds are programmed and how to identify what funds might be accessible to them and when, is fundamental to building capacity for better strategic planning and resource mobilisation. Thus, rather than a brief 10 minute introduction to the topic of EU Funding, if time is available, it is worthwhile to run a session (or sessions) over 1-2 hours to explore the topic of 'identifying EU funding opportunities'.

Learning Objectives	▪ Increased understanding of the various instruments that the EU uses to channel funding to CSOs in the Balkans and Turkey; ▪ to strengthen knowledge of how to access information about funding opportunities; ▪ better understanding of what a 'grant' is and the different types of grants; ▪ to be able to determine whether or not an organisation is eligible and has the capacity to manage any particular type of funding.
Methodology	Achieving the learning objectives will depend mostly on presenting a lot of information. Thus, there is a need to make formal presentations to cover three important topics: ▪ an overview of how EU funding is organised; ▪ what are 'grants' and other EU contracts; ▪ sources of information on funding opportunities. The first topic is best managed through a Powerpoint presentation, followed by a Question and Answer session. The second topic can be delivered in an interactive manner, with a Powerpoint presentation being used as a guide and the trainer asking participants to explain from their own experience the different terminologies. The third topic is ideally done through a) a Powerpoint presentation and online demonstration of the various web sites providing information in any one country, followed by b) an exercise whereby participants in groups of 3 use an internet-connected computer to undertake a research task given by the trainer to identify certain funding opportunities.
Timing	To make full presentations and then to facilitate an exercise and feedback from the exercise will take 90 to 120 minutes. A session which is delivered only with formal presentations and some questions and answers can be managed within 60 minutes
Tools	Powerpoint presentations Handouts Exercise: online researching of EU funding opportunities
Other Resources	Projector for PPT Wireless internet connection (and laptops for participants
References	*Identifying funding opportunities for your organisations*, p. 37 Toolkit: *Identifying funding opportunities*, p. 83-88

Tools: Presentations

Below you will find a set of information that you can make into PowerPoint Presentations for your training sessions. The information provided covers 3 key topics: i) an overview of how EU funding is organised; ii) what are 'grants' and other EU contracts; iii) sources of information on funding opportunities These notes are designed to help you formulate your presentations in an effective and efficient manner. While preparing your presentations, feel free to review chapter Developing and Managing EU-Funded Projects, p. 37, for further information on the subject and the Trainer Tips provided below in small boxes for improving your delivery. Also, please note that in terms of making Powerpoint presentations, the information below mostly concerns the overview on EU funding, given that it is the most complex of the topics.

Round Table discussions in Serbia on "Media and CSOs – Challenges and Opportunities", 2010

Developing and Managing EU-Funded Projects

1. AN OVERVIEW OF EU FUNDING

There are 3 main funding mechanisms of the EU:

- Instrument for Pre-Accession (IPA);
- thematic Programmes under other EuropeAid instruments;
- the Community Programmes.

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INSTRUMENT FOR PRE-ACCESSION (IPA)

Beneficiary Countries:

Candidate Countries:

- Turkey, Croatia, Montenegro, Former Yugoslav Republic of Macedonia.

Pre-candidate Countries:

- Albania, Bosnia and Herzegovina, Kosovo under UNSCR 1244/99, Serbia.

Not all components are open to every country.

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The Aim:

The aim of IPA assistance is to support the EU pre-accession strategy, particularly in pursuit of three key objectives:

1) progress towards meeting the Copenhagen political criteria;
2) adoption and implementation of the *Acquis Communautaire;*
3) promotion of Civil Society Dialogue.

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Specific Objectives of IPA:

- the Instrument of the Pre-Accession Assistance is a precursor for the future Social, Structural and Cohesion Funds;
- to prepare the candidate countries for multiannual years planning;
- to implement projects consistent with Community and national priorities;
- to set up independent structures of management, implementation, control, audit.

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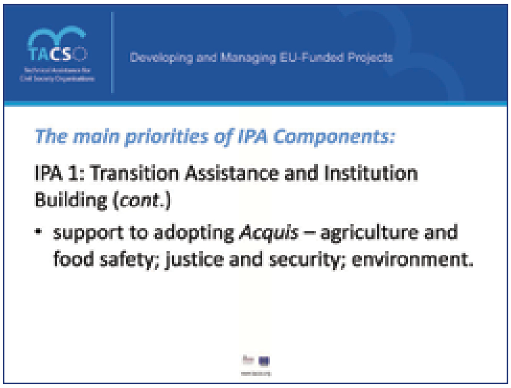
IPA has 5 components:

- Transition Assistance and Institution Building (I);
- Regional and Cross- Border Co-operation (II);
- Regional Development (III);
- Human Resources Development (IV);
- Rural Development (V).

TIP:

If your country is not yet a formal Candidate Country, it's best to emphasise that only Components 1 and 2 are relevant.



TIP:

Since only Candidate countries can benefit from IPA Components 3-5, you may keep the irrelevant sections much shorter.

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The main priorities of IPA Components:

IPA 4: Human Resource Development

- to contribute towards the priorities of the Community through strengthening economic and social cohesion (in conjunction with component III);
- support actions in line with the European Employment Strategy;

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IPA 4: Human Resource Development (*cont.*)

- Underpin the priorities and objectives of the Community by:
  - *strengthening education and training systems;*
  - *bringing inactive groups to the labour market;*
  - *combating social exclusion (disadvantaged groups);*
  - *promoting equality between men and women, and combating discrimination.*

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The main priorities of IPA Components:

IPA 5: Rural Development

- improving the technological and market infrastructure for increased added value of agri-food products and achieved compliance with EU quality, health, food safety and environmental standards;
- improved quality of life of the rural population, increased income and creation of new employment opportunities.

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THEMATIC PROGRAMMES UNDER OTHER EUROPEAID INSTRUMENTS

A mix of 'horizontal' and geographical instruments:

- **Development Cooperation Instrument (DCI);**
- **European Neighbourhood & Partnership Instrument (ENPI).**

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A mix of 'horizontal' and geographical instruments *(cont.)*:

- **European Instrument for Democracy & Human Rights (EIDHR);**
- **Instrument for Stability.**

Plus, the European Development Fund (EDF).

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THE COMMUNITY PROGRAMMES

Acceding and Candidate countries have the opportunity to participate in the programmes, although, as a main condition of participation, an annual fee has to be paid to the budget.

These Programmes can be tied to almost every Community policy. The Community decides on the type of programmes, their budgets and their durations.

TIP:

Explain more about these programmes if you have a good example of a project financed by them in your region.

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Key Community Programmes for CSOs in the Pre-Accession Countries are:

- Culture Programme (2007-2013)
- Erasmus Mundus
- Europe for Citizens
- FP7
- Public Health
- Youth in Action
- LIFE + Integrated Action Programme in Lifelong Learning

TIP:

You can include some pictures, logos or links of these programmes.

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HOW DOES THE EU CHANNEL ITS INVESTMENTS?

The EU channels its investments through different types of projects.

E.g. via the modernisation of a Ministry or the promotion of an active labour market.

TIP:

You can give some examples from local/ regional/ national projects in your region.

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'Macro' Projects

- With objectives of national importance;
- maybe cross-sectoral;
- managed from the Centre;
- often complex (with multiple components).

E.g. via the modernisation of a Ministry or the promotion of an active labour market

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'Micro' Projects

- With objectives of local importance or 'pilot' in nature;
- usually sector-based;
- managed locally (but may be part of a 'macro' project);
- usually limited to one type of 'action'.

E.g. by improving the drinking water supply of a municipality or by improving services for internal migrants.

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2. WHAT ARE GRANTS AND OTHER EU CONTRACTS

How are the projects implemented?

Projects can be implemented through grants awarded to achieve specific objectives.

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- Operational grants;
- Action grants;
- Competitive Calls;
- Direct Awards.

The EU makes a contribution either to a project carried out by an external organisation or directly to that organisation because its activities contribute to EU policy aims.

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Projects can also be implemented through public contracting to buy specific:

- services;
- supplies;
- works.

A Contracting Authority (of, or accredited to the EU) receives the product or service it needs in return for payment.

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What is a grant?

- A grant may support projects:
  - whose immediate objective is non-commercial;
  - whose activities are within the normal scope of the application organisation.
- the project is managed solely by the Grant Beneficiary;
- the results of the project are owned by the beneficiaries (or partners).

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What is a grant?

- A grant is a payment of a non-commercial nature by the Contracting Authority to a specific beneficiary to implement an action intended to help achieve an objective forming part of a European Union policy;
- but it is NOT a donation;
- funds support activities of beneficiaries;
- funds cover only eligible incurred costs.

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3. SOURCES OF INFORMATION ON EU FUNDING

In order to understand EU programming, it is important to understand:

- how are the EU funds programmed?
- how they can help CSOs be more strategic in their project development?

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Key steps for improved planning are:

1) To identify the types of funds available for your country.

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2) To review the relevant programme documents:
   - IPA Component 1&2 – annual programme and project *fiches;*
   - other IPA Components– Operational Programmes;
   - instruments like EIDHR – annual action programmes and *fiches;*
   - national Agencies for the Community Programmes in your country.

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Visit the web pages!

EC's DG for Enlargement web portal gives you broad information about accession process and financial assistance.

http://ec.europa.eu/enlargement/countries/index_en.htm

TIP:

Show snapshots of different web pages from the portal on each slide.

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In order to match your organization's priorities with EU Programmes, visit them regularly.

Understand which funds will be available in the next programming period and be prepared.

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The European Commission and Civil Society
http://ec.europa.eu/civil_society/index_en.htm

Funds available under IPA 3, 4, 5
Candidate countries only.

http://ec.europa.eu/enlargement/candidate-countries/turkey/financial-assistance/index_en.htm

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Community Programmes are managed in-country through national agencies - check out your EUD web pages.

http://www.eeas.europa.eu/delegations/web_en.htm

TIP:

The EU Enlargement web portal gives a selection of projects for each country. Use them!

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Remember!

Time spent on researching the EU programme documents will help your organisation to:

- integrate EU priorities into your strategic plans;
- identify funding opportunities;
- provide facts and figures to help justify project proposals.

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Using PADOR:

Another important feature of the DG Cooperation and Development (Europe Aid) web portal is access to **PADOR**, an online system for pre-registration of organisations interested in applying for EU external assistance.

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CSOs applying to grant schemes which are managed centrally by the EC (or by the country Delegations) are required to register on PADOR. Registration on PADOR is not necessary for organisations applying to grant schemes managed under Decentralised institutional arrangements (Croatia and Turkey).

TIP:

Confirm the validity of this information before using, since it may change in time according to pre-accession preparations of each country.


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PADOR is a web-based database is managed by EuropeAid and contains information about organizations applying for grants of the European Commission in the field of external assistance. To find out more about PADOR go to:
http://ec.europa.eu/europeaid/work/index_en.htm
and navigate to 'Work With Us / PADOR'.

Tools: Handouts

Below you will find a series of pieces of information that you can use as handouts during your training sessions. These handouts are complementary to the PowerPoint presentations mentioned previously. Remember not to overwhelm your trainees with too much information at once and present these handouts in a timely manner. For further information on how to utilize these handouts please refer to Identifying Funding Opportunities for Your Organisation in the Manual, p. 37.

Grant/Public Contracts - some definitions

Below are descriptions taken from the EuropeAid web portal:

Grants

Grants are direct financial contributions from the EU budget or from the European Development Fund. They are awarded as donations to third parties that are engaged in external aid activities. The Contracting Authority awards grants that are used to implement projects or activities that relate to the EU's external aid programmes.

Grants fall into two categories:

- grants for actions: they aim to achieve an objective that forms part of an external aid programme;
- operating grants: they finance the operating expenditure of an EU body that is pursuing an aim of general European interest or an objective that forms part of an EU policy.

Grants are based on the reimbursement of the eligible costs, in other words, costs effectively incurred by the beneficiaries that are deemed necessary for carrying out the activities in question. The results of the action remain the property of the beneficiaries. Grants are subject to a written agreement signed by the two parties and, as a general rule, require co-financing by the grant beneficiary. Since grants cover a very diverse range of fields, the specific conditions that need to be fulfilled (eligibility, etc.) may vary from one area of activity to another.

Those intending to apply for a grant should consult the Calls for Proposals.

Contracts

Procurement procedures are launched when the Contracting Authority wants to purchase a service, goods or work in exchange for remuneration. A procurement procedure leads to the conclusion of a public contract.

The difference between a public contract and a grant is clear: in the case of a contract, the Contracting Authority receives the product or service it needs in return for payment; in the case of a grant, it makes a contribution either to a project carried out by an external organisation or directly to that organisation because its activities contribute to Community policy aims.

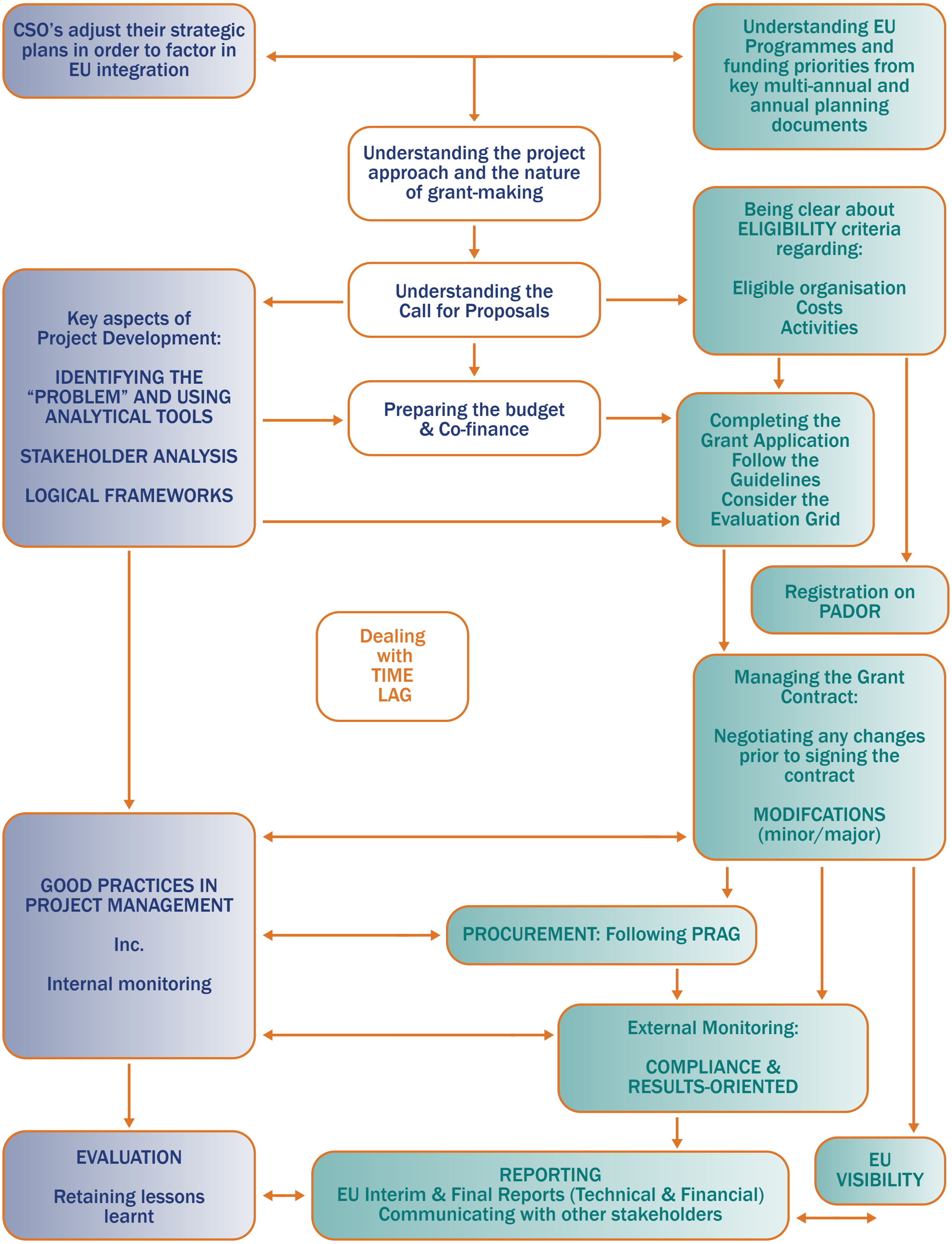
Procurement procedures are governed by specific rules which vary depending on the nature of the contract (service, supplies, work) and the threshold.

Those intending to apply for a contract should consult the Procurement Notices.

Procedures for grants and contracts under the relevant EU external aid programmes are consolidated in the Practical Guide.

CRITICAL PATH ANALYSIS:

For CSOs for Developing and Managing EU Funds



Guidance Notes on web-based sources of information on Calls for Proposals

EuropeAid web portal

Calls for Proposals are published on the EuropeAid web site and may also, in the case of countries which have 'decentralised' institutional arrangements, be published on local web sites (for example, in Croatia under the web site of the Central Finance and Contracting Agency at http://www.safu.hr/en/ and in Turkey under the Central Finance and Contracts Unit at http://www.cfcu.gov.tr). The EU Delegations in each country usually also have local language web pages with information about Calls for Proposals. On the EuropeAid web site http://ec.europa.eu/europeaid/work/index_en.htm you will need to navigate to the 'Work With Us/Funding: Calls for Proposals' page. There you can use the search mechanism to find 'open' calls for 'grants' for your country or region. Remember to choose dates for your search which begin for Calls published at least 3 months ago.

Example of EU's list of forecast Calls for Proposals (*)

GLOBAL CALLS FOR PROPOSALS - FORECAST OF UPCOMING CALLS (LAST UPDATE 01/08/11)(1)										
EXPECTED PUBLICATION DATE (2)	THEMATIC PROGRAMME	CALL TITLE	CALL REFERENCE	ELIGIBLE PARTICIPANTS (3)		PROCEDURE (4)	CONCEPT NOTE SUBMISSION DEADLINE	FULL APPLICATION SUBMISSION DEADLINE	TOTAL ESTIMATED BUDGET AVAILABLE	BUDGET YEAR(S)
				APPLICANT	PARTNERS					
1 October 2011	Non-State Actors and Local Authorities in Development - Objective 2	Development Education	131141	NSA	NSA, LA	Restricted	21 November 2011	8 March 2012	55.100.000€	2011-2012
15 October 2011	Non-State Actors and Local Authorities in Development - Objective 1	Actions in partner countries (Multi-country interventions) for Non-State Actors	131140	NSA	NSA, LA	Restricted	5 December 2011	29 March 2012	32.300.000	2011-2012
15 October 2011	Migration	Thematic program of cooperation with third countries in the areas of migration and asylum	131088	NSA, LA, IO	NSA, LA, IO, private companies	Restricted	1 December 2011	24 April 2012	75.000.000€	2011-2012
15 October 2011	Food security	Participation for governance	131144	All	All	Restricted	15 December 2011	17 April 2012	20.000.000€	2011
1 November 2011	Investing in People	Gender - Strenghtening protection and promotion of women's rights and women's social and economic empowerment	131087	All	All	Restricted	19 December 2011	16 April 2012	30.000.000€	2011
1 November 2011	Non-State Actors and Local Authorities in Development (Objective 1 and 2)	Local Authorities in Development	131143	LA	NSA, LA	Restricted	1 February 2012	15 May 2012	16.200.000	2011-2012
15 November 2011	Environment	Natural resources thematic program	131089	All	All	Restricted	16 January 2012	15 May 2012	100.000.000€	2011-2012

(1) This table includes a forecast only of thematic calls for proposals that have not yet been launched and for which guidelines and application forms are not yet available on the EuropeAid website. The information contained in this table is indicative only and subject to change.

(2) As a general rule, calls listed in this table will be launched on the 1st or 15th of each month.

(3) Detailed eligibility criteria can be found in the respective guidelines following publication. CSO - civil society organisation; NSA - non-state actor (non-profit); LA - local authority; RIO - Regional Inter-governmental organisation

(4) There are two types of procedure, restricted and open. The restricted procedure splits the evaluation process into two phases, the first phase requiring the submission of a concept note. Successful applicants are then invited to submit a full application for the second phase. The open procedure requires the submission of the full application form at the outset of the application process.

*A softcopy of this sheet can be obtained from:

https://webgate.ec.europa.eu/europeaid/online-services/index.cfm?ADSSChck=1224846858672&do=publi.welcome&userlanguage=en

Registration for PADOR

PADOR registration has three phases:

1. Identification/authentication

1.1. For accessing PADOR you need a username (login). This username is unique per person and can be used for accessing various databases at the European Commission.

1.2. Your username is linked to the email address that you provide on the "Identification" screen. E-mails concerning access to PADOR will be sent only to this mailbox! Make sure you will remember this e-mail address and the username for accessing PADOR in the future!

1.3. If you already have a username:

1.3.1. Go to the PADOR homepage and click on "You have an ECAS username"

1.3.2. You can update/consult an organisation: continue at point 3

1.3.3. You can create an organisation: continue at point 1.4.2.

1.4. You have never had a username at the European Commission:

1.4.1. Go to the PADOR homepage and click on "You do not have an ECAS username"

1.4.2. Introduce the data that identifies your organisation and submit it

1.4.3. If a list of organisations appears:

- either you select, if possible, the one whose data matches with your own organisation, uppermost the "Type 6"
- or you click on "My organisation is not on the list"

1.4.4. Confirm your registration

2. Obtaining the ECAS username and password

2.1. Check the mail account that you provided previously as Personal login on the "Identification" screen (see point 1.4.2.)

2.2. Read the email with the subject Availability of your account in the European

Commission Authentication Service (check your spambox as well)

2.3. Click on "this link" in order to obtain your username and password

2.4. Write down your username, create your password and click on "Submit"

2.5. Continue at point 3.2.

3. Filling in/Updating information in PADOR screens in order to obtain the EuropeAid ID

3.1. Start on the PADOR homepage and click on "You have an ECAS username". On the next screen, click on "You want to update/consult the account of your organisation"

3.2. Introduce your username (or login email) and password

3.3. Click on the name of your organisation (written with blue letters)

3.4. Fill in and save the "Administrative data" screen first. The "Profile" screen (option in the menu on the left side of the screen) will be activated afterwards.

3.5. Click on each of the "Screens to be filled in" (menu on the left hand side of the screens) and fill in ALL the obligatory fields (written with orange characters)

3.6. Sign your data, with the option SIGN (in the menu on the left side of the screen)

3.7. Once you have signed your data, the EuropeAid ID appears automatically on each PADOR screen, just under the title of the screen.

3.8. AFTER HAVING UPDATED YOUR DATA: SIGN AGAIN to confirm the modifications!

If you have forgotten your password:

1. Start on the PADOR homepage and click on "You have forgotten your ECAS password"

2. Click on « Don't yet have a password » or « Forgot your password »

The domain for accessing PADOR is always "EXTERNAL"

3. Introduce your username or "login email" (that you have provided previously as Personal login on the "Identification" screen (see point 1.4.2.)

4. Click on "Request ECAS password"

5. Consult your "login email" address (also check your spambox) and continue at point 2.4.

Tools: Exercises and Templates

Exercise on Searching for EU Funds

The exact task of the exercise will be tailored depending on the context of the training and profile of participants. But as an example, if the training is for members from environmental CSOs in country XYZ, the task could be threefold:

- find out about any forecast Calls for Proposals on environmental issues in Country XYZ;
- find out about any forecast Calls for Proposals aimed at CSOs funded through any non-IPA programmes for which the region is eligible and which have environmental actions;
- find out about any Calls for Proposals under the IPA-funded regional Civil Society Facility which might benefit environmental CSOs in Country XYZ.

Participants can work in groups of 2 or 3 using one laptop per group. The research should take around 20-30 minutes. Once the research is complete and every group has some information to share, a plenary feedback can go through each task, with different groups providing information against each task. The feedback and discussion will take another 20-30 minutes.

The exercise should be concluded by the trainer facilitating a discussion on 'how easy/difficult was the task?', 'how were any difficulties overcome?', 'what extra information was found of interest?'

Developing Effective Partnerships for Projects

Training Preparation

CSOs need to have specific capacities and competence to be able to develop and maintain successful partnerships, and this is a whole training area by itself. Thus, in this section, we will not attempt to provide tools and methodologies for delivering comprehensive training on 'partnership', but rather focus on particular partnership issues which are most relevant to CSOs interested in accessing EU Funds.

As partnership is increasingly an obligation in Calls for Proposals in the Western Balkans and Turkey, it is important in any training programme to dedicate at least one session (90 minutes) to the topic. The training plan below is designed exactly for such a session.

Learning Objectives	▪ To agree a common understanding of why partnership is important and the principles on which successful partnerships are based; ▪ to be able to assess what kind of partners your organisation needs for any application for EU funds; ▪ to have improved knowledge of how and where to find partners; ▪ to be able to identify the risks and opportunities of partnership within an EU-funded project.
Methodology	A brief and interactive presentation on the definition of 'partnership', underlying principles, and how 'partners' are defined in most EU Calls for Proposals. Case Study exercise (best done in small groups) to get CSO activists to think about the considerations in choosing a partner and what needs to be done in order to find a suitable partner for an EU grant application. The Case Study exercise can be followed by a plenary discussion to summarise the main lessons learnt and any advice from CSOs' experience. Thereafter it will be useful to present information about where CSOs in your country and region can seek help in finding partners both at home and internationally.
Timing	An introductory presentation and discussion on the concepts relating to 'partnership' can be covered in 30 minutes. Case study exercise in small groups and plenary discussion – 45 minutes. Wrap-up discussion and presentation of information sources in 15 minutes.
Tools	Powerpoint presentations Handouts Template: Partner Statement form from grant application form Exercise: Case Study on finding the right partner
Other Resources	Projector for PPT Flipchart for taking down 'lessons learnt'
References	*Developing Effective Partnerships for Projects, p. 46* Toolkit: *Developing Effective Partnerships for Projects*, p. 89-93

Tools: Presentations

Below you can find a series of pieces of information that you can make into PowerPoint Presentations for your training sessions. The information provided covers 5 topics: i) definition of partnership; ii) principles of successful partnership; (iii) finding the right partner for your organization; (iv) risks and opportunities of partnerships; and (v) how and where to find the partners. These notes are designed to help you formulate your presentations in an effective and efficient manner. While preparing your presentations, feel free to review Developing Effective Partnerships for Projects, p. 46 for further information on the subject and the Trainer Tips provided below in small boxes for improving your delivery.

1. PARTNERSHIPS

EU Calls for Proposals often include references to:

- partners;
- associates;
- sub-contractors.

> **TIP:**
>
> Give detailed descriptions and examples of these concepts at the beginning of the training session.

You need to be aware of the EU's definitions, but more importantly, have a stronger understanding of what 'partnership' means.

Definition of 'partnership'

"…Partnership is a cross-sector collaboration in which organisations work together in a transparent, equitable and mutually beneficial way. The partners agree to commit resources, share the risks as well as the benefits to work together towards a sustainable development goal."
- *currently used by The Partnering Initiative, January 2005.*

2. PRINCIPLES OF SUCCESSFUL PARTNERSHIPS

Core principles for effective partnerships are:

- equity;
- transparency;
- mutual benefit.

Fundamental conditions for a partnership to flourish are:

- commitment - including resources which may be financial, physical, human;
- agreement about the scope of the partnership;

- means for prioritising activities;
- targets that are to be achieved, which should be measurable.

Effective partnerships grow through the following steps:

- pre-dialogue - "contact";
- dialogue;
- consultation;
- co-operation;
- co-ordination;
- collaboration;
- formalised partnership.

TIP:

Ask your participants to describe these concepts in an interactive way before you move on to the next section.

3. FINDING THE RIGHT PARTNERS

Identifying a potential partner is an important step in project preparation. It can be very difficult unless you're well prepared. So, before you start looking for a partner, make sure that you reply to these questions:

- what do you need from this partnership?
- what kind of organizations are you looking for?
- does the location matter?
- how are you going to communicate?
- do you have a written introduction to your organization and team?
- do you have resources to establish the partnership?
- what networks or intermediaries can help you?

Beware of mismatches

- make sure you present the potential partner with a clear written request;
- establish contact with an appropriately authorized person;
- be clear about timelines;
- make your partner feel well informed, clear on any resources issues and empowered.

Partnership Agreements:

Whichever agreement template you're using, make sure that you include:

- objectives and expected outcomes from the partnership (the vision of the partnership);
- roles and responsibilities of partners;
- how communication will be carried out;
- mechanisms for monitoring and evaluation of results;
- procedures for managing conflicts and crises.

4. RISKS AND OPPORTUNITIES OF PARTNERSHIPS

Creating effective partnerships takes time. Partners improve their relations and build a mutual trust and respect over time. However, acknowledging the risks and opportunities of partnership can help you out in this process.

Risks

Being aware of risks and weaknesses will help your organization to be prepared for potential problems ahead.

- quickly formed partnerships: If a partnership is quickly formed with the main concern of being eligible for a certain Call for Proposal, it is bound to fail in the implementation phase. Identify your potential partners in advance and inform them in a clear and timely manner;
- overconfidence: If partners promise to do more than they can, they will end up being overloaded with work that they can barely accomplish, which would cause the project and partnership to fail. Be aware of each other's capacity to carry out the given roles and responsibilities;

TIP:

Don't forget to add colour to your presentations with some cartoons demonstrating the spirit of these concepts.

- lack of coordination and information sharing: Make sure that you identify the means of managing coordination and information sharing at the beginning of partnership discussions;
- unrealistic expectations: Effective partnerships require clear and mutual understanding of the purpose and expectations, which should be clearly discussed and identified at the very beginning.

Opportunities

On the other hand, a well functioning partnership can produce many opportunities, including:

- bringing significant added value to the project: A good partnership brings together different experience and knowledge, which strengthens different aspects of the project and eventually increases the success of the action;
- transfer of good practices: Partners can learn good practices from each other in a much quicker way than by themselves;
- building networks: A well-functioning partnership can expand your connections and help your organization to improve its network of people, information and resources .

5. HOW AND WHERE TO FIND THE PARTNERS

Potential Match-Makers

Civil society umbrella organisations and platforms:

> **TIP:**
>
> Select one and give snapshots from its webpage. Go step-by-step on the selected webpage system for partner search.

ACT FOR EUROPE: EU Civil Society Contact Group, www.act4europe.org

AGE PLATFORM EUROPE, www.age-platform.eu/en

BEUC: The European Consumers' Organization, www.beuc.org

BUSINESSEUROPE, www.businesseurope.eu

CONCORDE EUROPE: European NGO Confederation for Relief and Development, www.concordeurope.org

CULTURE ACTION EUROPE: The Political Platform for Arts and Culture, www.cultureactioneurope.org

EAPN: European Anti-Poverty Network, www.eapn.org

ENAR: European Network against Racism, www.enar-eu.org

ETUC: European Trade Union Confederation, www.etuc.org

EUROPEAN CIVIC FORUM, www.cidem.org

EUROPEAN DISABILITY FORUM, www.edf-feph.org

EUROPEAN YOUTH FORUM, www.youthforum.org

EUROSTEP: European Solidarity towards Equal Participation of People, www.eurostep.org

EUROPEAN WOMEN'S LOBBY, www.womenlobby.org

EUROPEAN ENVIRONMENT BUREAU, www.eeb.org

EUROPEAN PUBLIC HEALTH ALLIANCE, www.epha.org

FEANTSA: European Federation of National Organizations Working with the Homeless, www.feantsa.org

SOCIAL PLATFORM: Platform of European Social NGOs, www.socialplatform.org

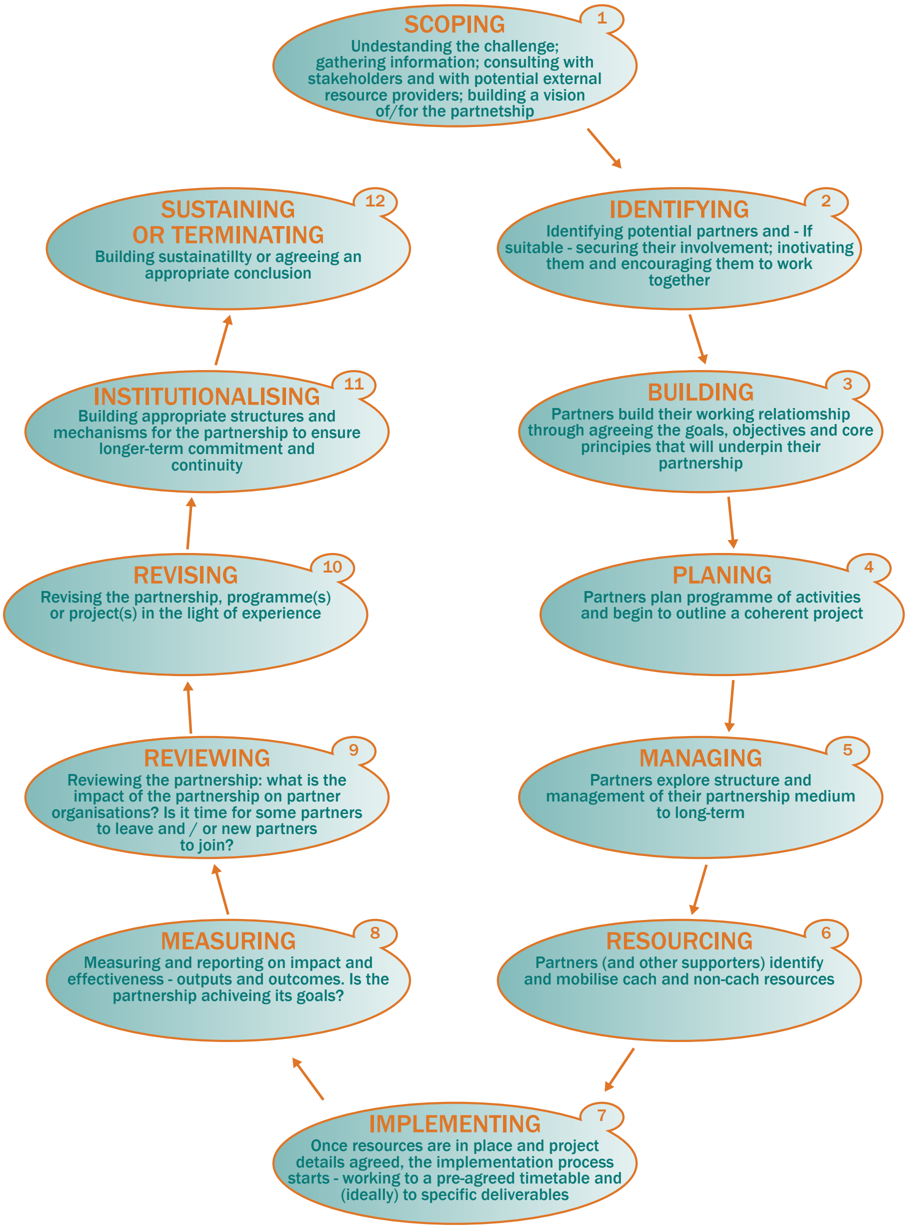
SOLIDAR: European network of NGOs working to advance social justice in Europe and worldwide, www.solidar.org

TRIALOG: Development NGOs in the Enlarged EU, www.trialog.or.at

TOOLS: HANDOUTS

Below is a series of pieces of information that you can use as handouts during your training sessions. These handouts are complementary to the PowerPoint presentations mentioned previously. Remember not to overwhelm your trainees with too much information at once and present these handouts in a timely manner. For further information on how to utilize these handouts please refer to Developing Effective Partnerships for Projects, p. 46.

Partnership "Cycle"



Tools: Exercises and Templates

EXERCISE:

Case Study for a Partnership Action – ‘The Journalists Association Project’

Introduction

The Antalya Journalists Association is a membership-based NGO serving the interests of professionals in the media industry in the southern Mediterranean region of Turkey. The Association has 3 full time staff and an active Board, and provides regular training on legislation relating to the media, as well as some technical training, and represents its members’ interests with media owners. Local journalists who are members of the Association have limited knowledge of journalistic practices within the EU and few opportunities for professional development. So the Association applied for and was awarded a grant under the EU-Turkey Civil Society Dialogue scheme. The application required an obligatory partnership agreement with a similar organisation in an EU Member State. The grant-funded project’s activities were mostly related to formal training workshops, study visits, and the production of a ‘good practice’ handbook for journalists, and had a budget of 90,000 euros and a duration of 15 months.

Project and Partnership Development

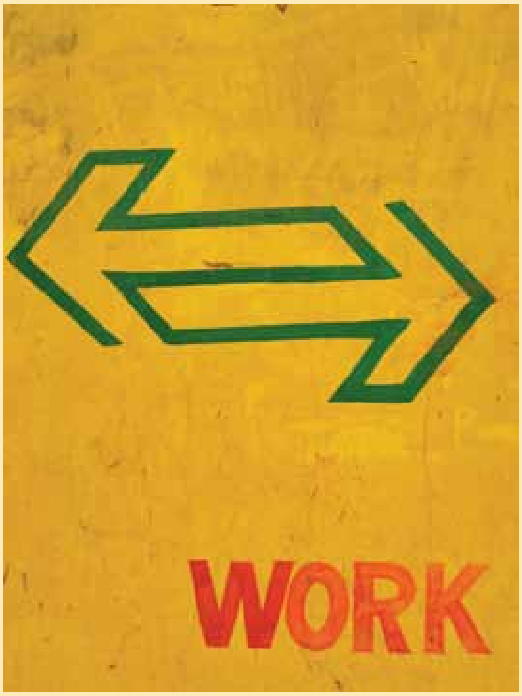
The Association had conducted a needs assessment of their members prior to the Call for Proposals and thus once the Call was announced it was easy for the Association’s Director to work with a small group of members to fully develop a logframe and project proposal. This proposal stated that the main purpose was to increase capacities of the individual members in terms of applying good practices from the EU in their work, and proposed that the objectives would be met through formal training provided by the Association and study visits to EU Member States.

The draft proposal was finished 3 weeks before the application deadline and the Association then sent the draft to 3 similar organisations in the EU that it had identified via the internet. The draft was sent with a simple email cover message in English asking the organisations if they were interested in being partners.

Only one organisation responded. This was NGO Publica, from a small town in southern Spain. NGO Publica was established 10 years ago as a cultural organisation and has since managed to generate income through the provision of various training in the culture and arts sector. They have 5 full time staff, including a Project Officer who has significant journalistic experience, and run an informative web site with cultural news and events. The organisation has been involved in eight EU-funded projects.

NGO Publica signed the Partnership Statement and provided the necessary supporting documents. 11 months after submitting their proposal, the Antalya Journalists Association were awarded their grant and once they had mobilised their Project Coordinator and updated their project work plan, they re-contacted NGO Publica.

Project Implementation



As this was the first EU grant managed by the Association, the first 4 months setting up the project was very difficult. However, by the 5th month, the Association asked NGO Publica to help them to arrange a study trip to Spain and to help them produce a Guide for Trainers of good practices. To coordinate these activities the Association in Antalya formally agreed to pay a monthly salary (based on 5 days of work per month) to a Spanish coordinator based with NGO Publica. This arrangement was as planned in the grant application, and was finalised via email correspondence. However, there was no full job description developed for the Spanish coordinator and no Terms of Reference for either the Study Visits or Handbook.

By the 11th month of the project the Antalya Association had completed all its training activities, using experts identified in Turkey, and had received about 25% of the draft pages of the Handbook, but had not yet completed the Study Visit. With only 4 months remaining of the grant contract, less than 50% of the budget had been disbursed.

The Association in Antalya stopped paying the monthly salary to the Spanish coordinator in the 11th month of the project (having paid 6 months from a budgeted total of 10 months), and asked the Contracting Authority in Turkey if they could change their partner...

Discussion Points

- Was NGO Publica a good choice of partner?
- How would you have advised the Journalists Association of Antalya to strengthen their relationship with NGO Publica before and during the project implementation?
- If you were the Project Manager, what would you do to ensure a successful completion of the project in the final 4 months?

Template for a Partnership Agreement

SAMPLE PARTNERSHIP STATEMENT

A partnership is a relationship of substance between two or more organisations involving shared responsibilities in undertaking the action funded by the <........ > (Contracting Authority). To ensure that the action runs smoothly, the Contracting Authority requires all partners to acknowledge this by agreeing to the principles of good partnership practice set out below.

1. All partners must have read the application form and understood what their role in the action will be before the application is submitted to the Contracting Authority.
2. All partners must have read the standard grant contract and understood what their respective obligations under the contract will be if the grant is awarded. They authorise the lead applicant to sign the contract with the Contracting Authority and represent them in all dealings with the Contracting Authority in the context of the action’s implementation.
3. The applicant must consult with its partners regularly and keep them fully informed of the progress of the action.
4. All partners must receive copies of the reports - narrative and financial - made to the Contracting Authority.
5. Proposals for substantial changes to the action (e.g. activities, partners, etc.) should be agreed by the partners before being submitted to the Contracting Authority. Where no such agreement can be reached, the applicant must indicate this when submitting changes for approval to the Contracting Authority.
6. Where the Beneficiary does not have its headquarters in the country where the action is implemented, the partners must agree before the end of the action, on an equitable distribution of equipment, vehicles and supplies for the action purchased with the EU grant among local partners or the final beneficiaries of the action.

TACSO Regional Training „Developing and Managing EU Projects“, Turkey, 2010

Preparing Successful Project Proposals

Training Preparation

This Manual and Toolkit assumes that CSOs using it already have some ability in developing projects, and thus the learning opportunities presented here are focused on critical aspects of project preparation for EU funding. In the reference part of the table below, you can find links to broader training tools and materials on general project development.

Given that the award of EU grant funding is entirely dependent on the successful evaluation of a completed Grant Application Form, it is wise to spend the majority of any training time on the topic of how to prepare a successful proposal. Apart from being of fundamental importance, it is also a training topic which is best delivered through lots of learner practice, and the implementation of practical training exercises always takes a lot of time. Thus, to achieve the Learning Objectives below, using the proposed methodologies, will take a minimum of half a day, and ideally should be part of a broader project preparation training which would take up to three days.

CRP's meeting in Rtanj with partners and beneficiaries

Learning Objectives	▪ To be aware of the necessary analysis to make project ideas credible, relevant, and feasible; ▪ to understand how to use a Logical Framework; ▪ be able to use a log frame as the basis of a Grant Application; ▪ understand how to undertake cost analysis, the concept of costs eligibility, and how to ensure the project budget is suitable; ▪ know the essential 'do's and don'ts' of completing an EU grant application.
Methodology	Given that there is an assumption that those learning have some familiarity with PCM, the best way to start this topic is to get all participants to go over and revise the cycle. So, draw a large circle on a flip chart and ask participants to name the important parts. Then review using a few PPT slides. Thereafter it will be useful to keep an example going throughout the sessions, as the approach is to get participants to build-up their own project design, going from Problem Tree to Log frame to Application Form. If you have plenty of time (2-3 days), you can ask participants to use their own 'real problems' and nascent project ideas. However, if time is restricted, you'll need to use samples and 'half-complete' examples of log frames and use exercises for participants to work-on the samples you provide. Once you have revised the use of so-called problem and solution trees, it is important that any examples that participants are using are correctly monitored to make sure that the causes and effects are true. Part of the 'problem identification' stage should also include a Stakeholder Analysis, and this is often one of the weakest links in the process. Thus, it is useful to spend 30 minutes to discuss what a stakeholder is and what are the various stakeholder interests and their influences. A simple practical exercise can be done whereby participants describe their own stakeholders and use the Stakeholder Matrix to analyse them. One important aspect here is to emphasise the role of partners and associates in EU grants. Then use PPT slides to demonstrate what the log frame is used for. Remember to emphasise the importance of keeping to the logic of the framework and that it must be constructed from top left to bottom right. Participants can then do a practical exercise to check that they can correctly use a log frame. They either work on their own project designs or a sample given by the trainer. It is best to get participants to work on just a few cells of the log frame and then check their work in a group before moving on to the next cells. So, do an exercise first on the Overall Objectives, Purposes, Specific Objectives, followed by Activities, and then fill in the indicators. This work is best done in small groups. Once learners have finished a log frame and the trainer has led a group discussion to clarify the good and bad points of draft log frames and common mistakes, it is time to move on to the Grant Application Form. Present the Grant Application Form by first using a few PPT slides to focus on the 'golden rules' and terminology. Then take a sample Form and go through each section, checking understanding and discussing common mistakes. This can be done through getting participants to give examples of their experiences. Learners must understand that an Application Form can only be successfully completed AFTER all the analysis is complete (especially the log frame). If possible, show good and bad examples of completed forms (but remember, if you use real examples, make sure you have permission from which ever organisation drafted the form!). Finally, spend some time looking at how the budget is constructed. Firstly, use a few PPT slides to clarify the concepts and principles of EU grant budgets, then look at how costs should be analysed and estimated. Lastly, go through the budget template, and discuss do's and don'ts for each budget line.

Timing	Ideally: 1 day for PCM review and Problem Analysis; 1 day for Log frames; 1 day for Application Form and Budget. However, with less time available, sessions can be done as follows: 60mins PCM review; 60mins Problem Analysis; 90mins Log frames; 90mins Application Form; 45mins Budget.
Tools	PPT Presentations Flip Chart Presentations Samples and Working Examples Exercises Handouts
Other Resources	Projector Flip Chart Plenty of flipchart paper and pens for group work Display area for group work
References	*Preparing Successful Project Proposals, p. 53* Toolkit: *Preparing Successful Project Proposals,* p. 94-101

Strategic Planning and Fundraising Training, Turkey, 2010.

Tools: Presentations

Below you will find some pieces of information that you can make into PowerPoint Presentations for your training sessions. The information provided covers 5 topics: i) analyzing the problem; ii) identifying the project; (iii) preparing the logical framework; (iv) completing the grant application form; and (v)getting the budget right. These notes are designed to help you formulate your presentations in an effective and efficient manner. While preparing your presentations, feel free to review Preparing Successful Project Proposals, p. 53 for further information on the subject and the Trainer Tips provided below in small boxes for improving your delivery.

1. ANALYZING THE PROBLEM

As a CSO set up to deal with certain problematic areas and issues, you are expected to be good at identifying the problems and designing the solutions effectively. In order to do this, you need to have comprehensive background information about the problem you intend to address with your project.

Collect information!

The first step in preparing a successful project proposal is to collect all the necessary information about the problem. The information must be valid and credible.

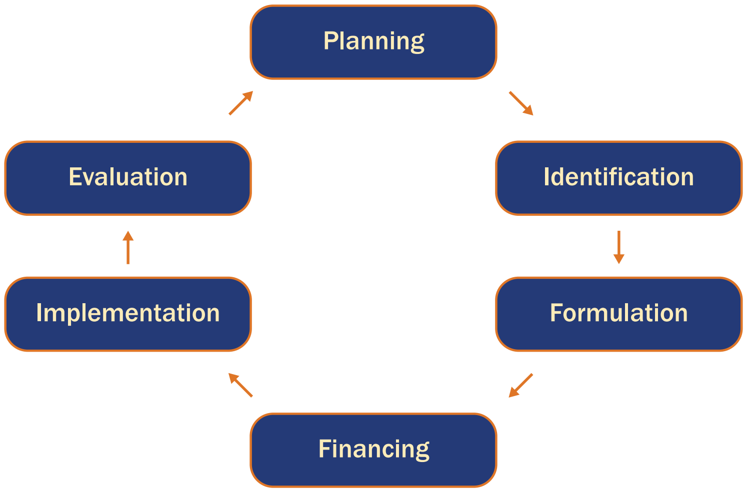
Once you understand the scope of the problem, you need to ask yourself:

"Is my project idea addressing an un-met need in society?"

In order to answer this question accurately and to formulate your project easily, you can use a well-known tool of **Project Cycle Management (PCM).**

TIP:

Ask your participants to name some ways of collecting valid information and suggest new ways.



2. IDENTIFYING THE PROJECT

After you analyse your problem, it is time to identify what project is actually feasible given the size and nature of that problem, the capacity of your organisation, and the context of the problem.

The PCM will help you develop your project idea into a working plan which can be implemented and evaluated effectively.

The stages in the project cycle are designed to:

- help convert ideas into projects;
- ensure the projects are documented and prepared so that they are technically and institutionally feasible;
- help you prioritise between different projects;
- help your projects achieve sustainable outputs;
- improve monitoring and reporting;
- improve in future project planning the process of learning by experience (use the results of monitoring and evaluation).

TIP:

PCM is a complex process that requires a separate training. Make sure that your trainees are familiar with PCM before you move on to the next section.

There are several tools that can be used during one or more stages of the project cycle; each helping us to understand the answers to some crucial questions.

When you ask yourself:

"How are all the problems related to our main concern linked with each other?"

You can get a clear answer by using the **Problem Tree Analysis**.

Problem Tree Analysis will help you to illustrate the hierarchy of factors related with your main problem. It is used to:

- link together the various issues or factors which may contribute to an institutional problem;
- help to identify the underlying or root causes of an institutional problem.

The major assumption underlying the problem tree is the hierarchical relationship between cause and effect.

How do I use it?

- identify the major existing problem and issues based on available information (e.g. by brainstorming);
- select one focal problem for the analysis e.g. river water quality is deteriorating;
- develop the problem tree beginning with the substantive and direct causes of the focal problem e.g. high levels of solid waste dumped into river.

After you analyse the problem, you then need to make the Objective Tree Analysis in order to:

- convert the negative situations in the problem tree into positive reality, which is the objective. For example, when you identify "deteriorating river water quality " as a core problem, one of its effects would be "declining fish stocks"; in an objective analysis you convert it into "fish stocks are increased";
- verify the hierarchy of objectives;
- visualize the means-end relationships in your diagram.

TIP:

Provide your trainees with an empty Problem Tree template and fill in the boxes interactively before you distribute the relevant handout.

Remember!

Objective Tree analysis also helps you identify and clear out the objectives that seem unrealistic, too ambitious or not feasible within the context of your project.

After you identify your objectives, it is time to ask yourself:
"Who will be affected positively and negatively by our project?"
The answer comes with a **Stakeholder Analysis**.

Stakeholder analysis should always be done at the beginning of a project.

Stakeholder analysis is the identification of a project's key stakeholders, an assessment of their interests, and the ways in which these interests affect project riskiness and viability.

Stakeholders are persons, groups or institutions with interests in a project or a programme.

TIP:

Stick to one simple project idea throughout this session and give explanatory examples at each new definition.

Stakeholders include both winners and losers, and those involved or excluded from decision-making processes.

Key stakeholders are those who can significantly influence, or are important to the success of the project.

How to do I make a stakeholder analysis?

In order to draw up a stakeholder table:

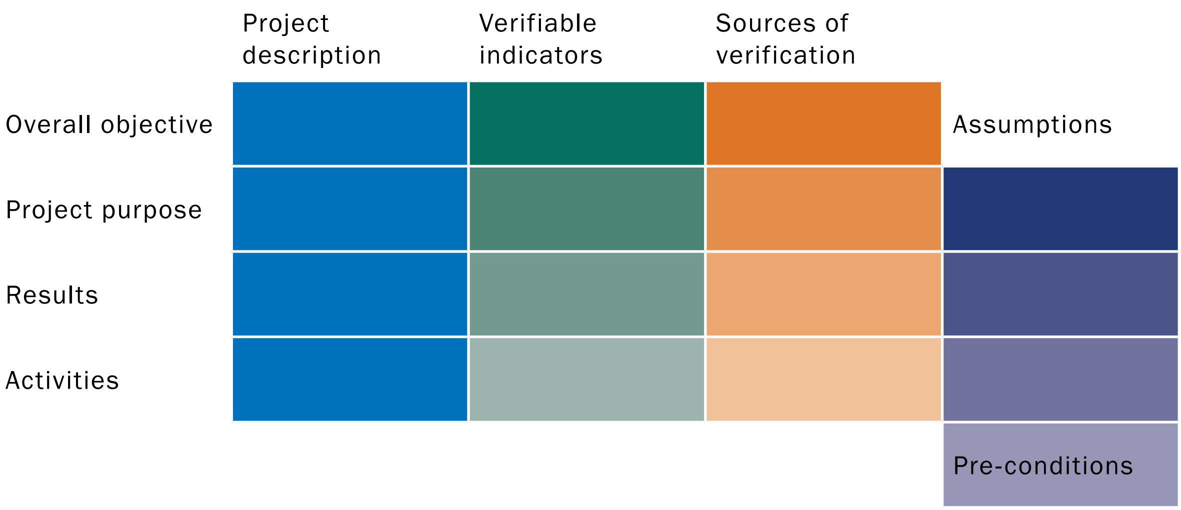
- identify and list all potential stakeholders;
- Identify their interests (open and hidden) in relation to the problems being addressed by the project and its objectives. Note that each stakeholder may have several interests;
- briefly assess the likely impact of the project on each of these interests (positive, negative, or unknown);
- do an assessment of each stakeholder's importance to project success and their relative power/influence – this will indicate how important it is to involve them in the planning, implementation and other parts of the project.

3. PREPARING THE LOGICAL FRAMEWORK

When you have everything ready to design your project, you need to ask yourself:

"How do we turn these into a well-planned project?"
Now, it is time to prepare a **Logical Framework**.

The Logical Framework (log frame) is a widely used tool to describe major elements of a project; it gives answers to questions about the why, what and how of a project and also about the who, where and when. The description is presented in the form of a simple matrix.



Remember!

Getting the logframe right is crucial for a strong grant application.

Drafting the Overall Objective:
What is the higher level objective to which your project is intending to contribute?
E.g. "To contribute to improved family health, particularly of under 5s, and the general health of the riverine eco-system"

Drafting the Project Purpose:
What is the immediate effect or impact of the project on the target group? What is the project trying to achieve?
E.g." Improved quality of river water"

Drafting the Results (Outputs):
What are the improvements or changes that the project will deliver to accomplish its purpose?
E.g. "Waste-water treatment standards are established and effectively enforced; volume of waste-water directly being discharged into the river system is reduced."

Drafting the Activities:
What are the main activities that must be undertaken in order to achieve the results?
E.g. "Complete engineering specifications for expanded sewerage network; identify appropriate incentives for factories to use clean technologies; prepare and deliver public information and awareness programme."

Identifying the Inputs (Means and Costs):
What are the materials, equipment skills and other resources that must be provided to carry out the activities? What are the costs and timing of these inputs?
E.g. "PR staff is needed for managing public information advertisements; a baseline survey of factories needs to be conducted."

Identifying the Indicators:
What are the observable changes or events providing evidence that something has happened – whether an output delivered, immediate effect occurred or long-term change observed?
E.g. "Qualitative and quantitative data on reduced volume of waste-water directly discharged into the river."

Remember!

A common error is to assume that indicators are the same as ‘targets’ and therefore to draft indicators which actually end up looking like the same statements for the ‘results’. Indicators are NOT targets.

Indentifying the Assumptions:
What external factors may impact on project implementation and the long-term sustainability of benefits, but are outside project management's control?"
E.g. "River flows maintained above X mega litres per second for at least 8 months of the year"

Identifying the Sources of Verification:
How you will collect the observations of the indicators? What sources of information will you use?
E.g. "Weekly water-quality surveys"

> Remember!
>
> Continually 'test' the logic of your framework as you must maintain the discipline of the log frame.

In the logical framework, relationships between the assumptions and the intervention logic are presented as follows:

- IF the pre-conditions are met, THEN the activities can be started;
- IF the activities have been carried out, and IF the assumptions at this level hold true, THEN results will be achieved;
- IF the results are realised, and IF the assumptions at the result level have come true, THEN the project purpose will be realised;
- IF the project purpose is realised, and IF the assumptions at the project purpose level have come true, THEN the overall objective will have significantly been contributed to.

> **TIP:**
>
> It is easier for the participants to follow charts and diagrams than texts. Make sure that you improve the visual aspect of your PPTs while you give the necessary information.

Make the log frame work for you in preparing a clear, consolidated, and robust grant application:

- develop the description of the purpose, but DON'T write in new objectives;
- ALL activities MUST contribute towards achieving the expected results;
- make sure the proposed monitoring system is SMART;
- the 'inputs' or means MUST be accounted for in the budget.

4. COMPLETING THE GRANT APPLICATION FORM

Once you have a strong log frame, the process of completing the full grant application form gets much easier. Before you start filling in your application form, be clear about the roles of the different stakeholders and the EU terminology:

- contracting Authority (EC or EUD / CFCU);
  - centralised management,
  - decentralised management,
- beneficiary Institutions;
- grant beneficiary;
- target group;
- final beneficiary.

TIP:

Make sure that your participants understand every definition clearly before you move on to the next section.

Golden Rules for Completing a Grant Application Form:

- read ALL the details in the Guidelines and accompanying documents;
- complete EVERY SECTION of the Application Form, following the guidelines carefully (For example, if the guidelines suggest that one particular section should only be a maximum of 3 pages, do not exceed 3 pages!);
- carefully follow the instructions regarding deadlines and how to make the application. If the deadline is missed or if your application documents are not complete, your application will not be considered.

Understand the Keywords of Grant Management:

- non-cumulation: No single beneficiary may receive more than one grant financed by the European Community or EDF for a given action;
- non-retroactivity: Grants may, as a rule, only cover costs incurred after the date on which the grant contract is signed;
- non-profit: Grants may not have the purpose or effect of producing a profit for the beneficiary;
- co-financing: Grants may not, as a rule, finance the entire cost of the action;
- eligibility: Applicants must fulfil the eligibility criteria stated in the relevant Call for Proposal.

Eligibility Criteria covers:

- the applicant organization and its partner(s);
- direct and indirect costs;
- actions (where and when they take place).

TIP:

Give an example from one Call for Proposal that your applicants would be interested in applying

Verifying Applicant Eligibility:

The application form asks for information and declaration about your organization's:

- legal status;
- nationality;
- function/type;
- sector/experience;
- resources;
- governance.

This information is either verified after evaluation of the application and before contracting OR prior to application via the online PADOR System.

Be careful of Calls for Proposals where partnership is obligatory and so is the use of PADOR - your partner(s) MUST also pre-register through the PADOR system.

Common Application Errors:

- incomplete forms and/or missing annexes – NGOs are not bureaucracies, but attention to detail and record-keeping is essential;
- project description does not follow the log frame;
- poor budgeting – not the end of the world, but you will lose evaluation points;
- not in-line with overall objectives – the action must clearly make a contribution;
- 'three halves don't make a whole' – ensure there is close cooperation amongst the team;
- lack of ownership – you may be awarded a grant, but then lose it through poor implementation.

TIP:

Show a snapshot from the PADOR system and be prepared to provide your trainees with more information about it if they're not.

TACSO Regional Training „Developing and Managing EU Projects“, Turkey, 2010

5. GETTING THE BUDGET RIGHT

Before you complete Annex 3 of the Application Form, make sure to:

- understand the concept of the ‘budget’ in terms of EU procedures (eligibility of costs);
- take into account the full costs of implementing a proposed project activity (inflation etc.);
- do not rely on the ‘Contingency Budget’; it will require a strong justification and approval from the EU when needed;
- prepare your budget closely following the budget template and guidelines that describe the permitted budget lines.

Remember!

- the budget represents realistic cost estimates, broken down by units with no lump sums, and a ceiling for eligible costs;
- co-financing is calculated as a % of the total, not for specific costs;
- in-kind contributions cannot usually be monetarized and thus are not considered as ‘costs’;
- indirect costs – 7% to cover overheads;
- incorporate a ‘contingency reserve’ if allowed.

“Training on Project Proposal Writing for EU Funds”, Serbia, 2010.

Tools: Handouts

Below you will find some information that you can use as handouts during your training sessions. These handouts are complementary to the PowerPoint presentations mentioned above. Remember not to overwhelm your trainees with too much information at once and present these handouts in a timely manner. For further information on how to utilize these handouts please refer to Preparing Successful Project Proposals, p. 53.

Project Cycle Management

The Project Cycle follows a sequence or pattern in which projects are planned and carried out. The cycle starts with an idea and helps planners to develop their idea into a working plan which can be implemented and evaluated.

There are six stages in the project cycle:

- **Planning**: analysis of the situation at national, local and sectoral level. CSOs should review their own Strategic Plan and look to find synergies with the programming documents of the EU and national Government. In this way funding opportunities can be identified for the coming 1-3 years;
- **Identification**: formulation of the initial project idea and the design of the project addressing technical and operational aspects;
- **Formulation**: the project proposal is formatted to a template suitable for presentation to a potential funder. In the case of EU funding, this is likely to be in the format of a Grant Application Form;
- **Financing**: securing financial resources, which may be the award and contracting of an EU-funded grant;
- **Implementation and Monitoring**: implementation of project activities with ongoing checks on progress and feedback;
- **Evaluation**: periodic review of project with feedback for next project cycle.

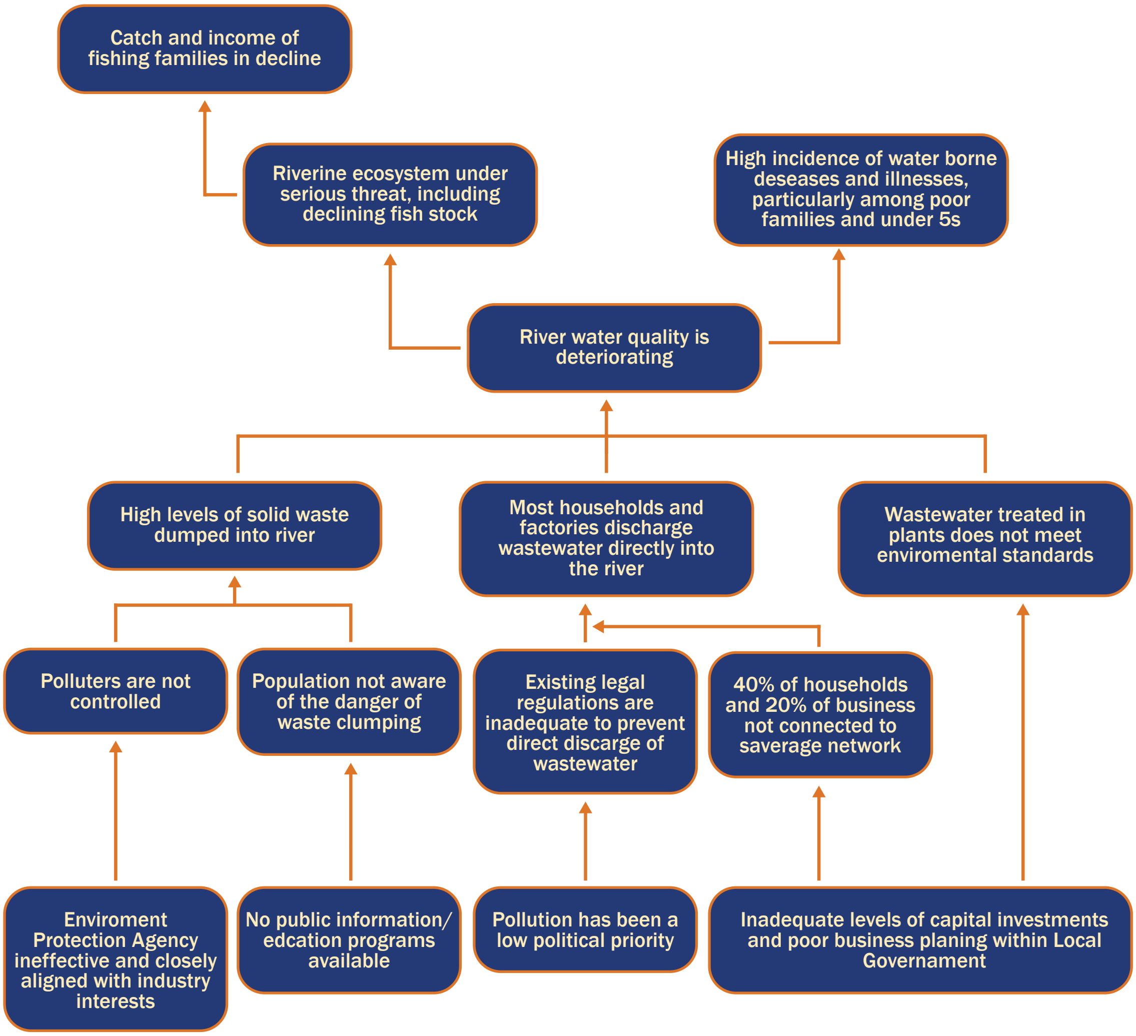
The cycle represents a continuous process in which each stage provides the foundation for the next. Decision making is carried out at each phase.

Project description	Indicators	Source of verification	Assumptions
Overall objective - The project's contribution to policy or programme objectives (impact)	How the OO is to be measured including Quantity, Quality, Time?	How will the information be collected, when and by when?	
Purpose - Direct benefits to the target group(s)	How the Purpose is to be measured including Quantity, Quality, Time?	As above	If the Purpose is achieved, what assumptions must hold true to achieve the OO?
Results - Tangible products or services delivered by the project	How the Results are to be measured including Quantity, Quality, Time?	As above	If Results are achieved, what assumptions must hold true to achieve the Purpose?
Activities – Tasks that have to be undertaken to deliver the desired results.			If Activities are completed, what assumptions must hold true to deliver the results?

*Taken from EC's Project Cycle Management Guidelines, March 2004

PROBLEM TREE: River Pollution Example

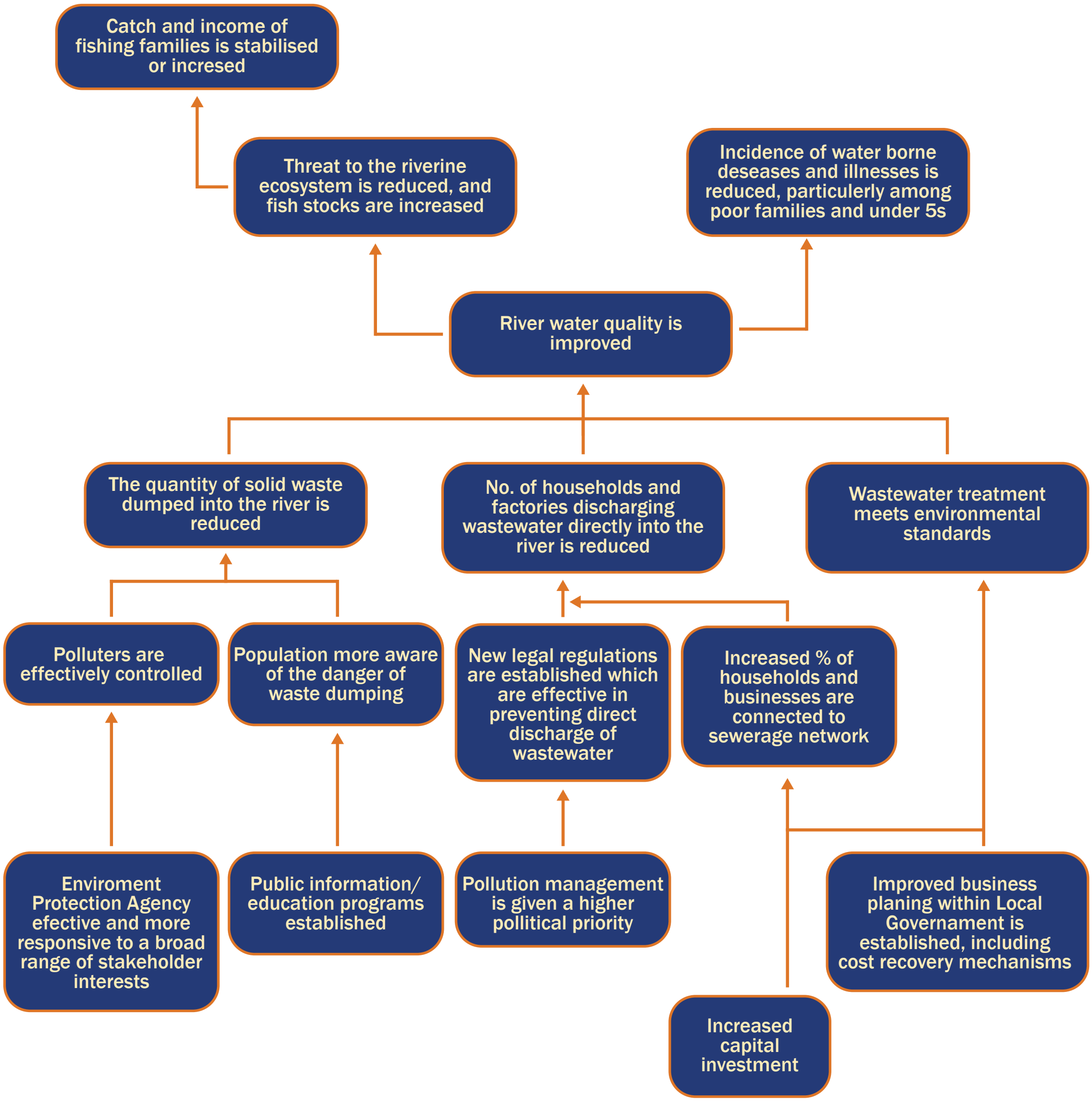
Problem analysis - river pollution



*Taken from EC’s Project Cycle Management Guidelines, March 2004

OBJECTIVE TREE: River Pollution Example

Objective tree - river pollution



*Taken from EC's Project Cycle Management Guidelines, March 2004

STAKEHOLDER ANALYSIS

What is Stakeholder Analysis?

Stakeholder analysis is the identification of a project's key stakeholders, an assessment of their interests, and the ways in which these interests affect project riskiness and viability. It is linked to institutional appraisal and social analysis, drawing on the information deriving from these approaches, but also contributing to the combining of such data in a single framework. Stakeholder analysis contributes to project design and helps to identify appropriate forms of stakeholder participation.

Definitions

Stakeholders are persons, groups or institutions with interests in a project or a programme. **Primary stakeholders** are those ultimately affected, either positively (beneficiaries) or negatively (for example people who are involuntarily resettled). This definition of stakeholders includes both winners and losers, and those involved or excluded from decision-making processes. **Key stakeholders** are those who can significantly influence, or are important to the success of the project.

In a participatory approach to program evaluation, an evaluation co-ordinator, often from outside the program or organisation, works in partnership with program stakeholders in all phases of the evaluation process. Program stakeholders are those individuals who have a stake in how the evaluation turns out. They are persons who will later make decisions and use the information generated by the evaluation.

Why do a stakeholder analysis?

In each instance evaluation planners will have to decide who the appropriate stakeholders are and to what extent some or all of them should be involved. Involving a larger rather than smaller number of people is not necessarily better. Also, it is important to remember that not all stakeholders will be interested or able to participate in this time-consuming exercise.

In a participatory approach the role of the stakeholders is to share their experiences of working with the programme. To participate in collecting additional information about programme implementation, to work with the evaluation team to analyse both the data collected and the experiences described; and to formulate conclusions about the programme strategy and outcomes.

Stakeholder analysis helps to assess a project and its environment and inform the negotiating position of project implementers. It can:

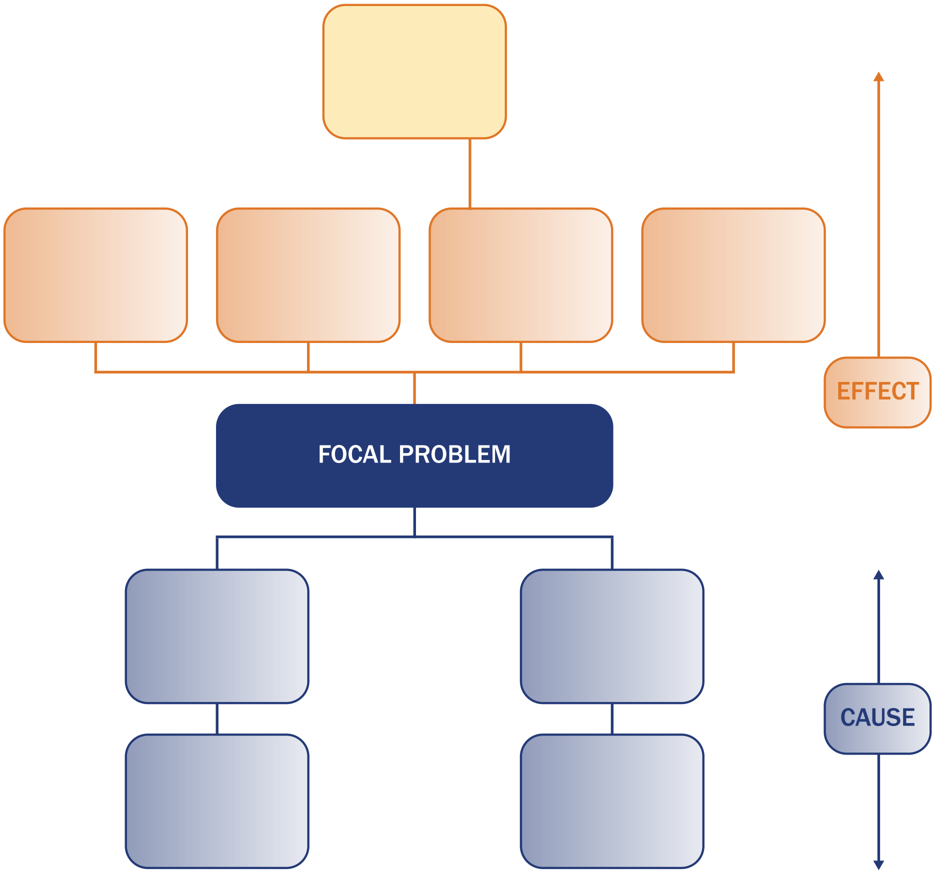
- draw out the interests of stakeholders in relation to the problems which the project is seeking to address (at the identification stage) or the purpose of the project, (once it has started);
- identify conflicts of interests between stakeholders at an early stage;
- help to identify relations between stakeholders which can be built upon and may enable coalitions;
- helps to assess the appro cipation by different stakeholders, at successive stages of the project cycle.

When should it be done?

Stakeholder analysis should always be done at the beginning of a project, even if it is a quick list of the stakeholders and their interests. Such a list can be used to draw out the main assumptions which are needed if the project is going to be viable, and some of the key risks.

Tools: Exercises and Templates

Template: Developing the problem tree



Template: Developing the problem tree

Stakeholders	Their interest	Information required	Power in decision making

Passing the Evaluation

Training Preparation

As part 'D' in Section 2 of the Manual emphasises, CSOs can easily make their grant applications stronger by undertaking their own evaluations of their proposals. There are basically two ways of doing this: either the evaluation is done 'in-house', which means that staff of the CSO applying for a grant makes their own critical evaluation; or the organisation finds an external consultant (either voluntary or paid) who has experience in project management and project assessment and asks her/him to undertake a 'mock evaluation'. Thus, training on this activity can be quick and simple, and is mostly based on looking at the Evaluation Grid and the process of evaluation.

Learning Objectives	▪ Understand what a 'grant evaluation' process is, and how an evaluation is 'scored'; ▪ be able to undertake a 'mock evaluation' of a drafted Grant Application Form and thereafter use lessons learnt to improve the Application; ▪ have a better understanding of how to make a Grant Application more competitive.
Methodology	Use PPT slides to present the Evaluation process and then go through an Evaluation Form. Run an exercise to get participants to implement their own 'mock evaluation'. Present a list of 'tips' on how to make the Application more competitive - either give a whole list, or give some tips and then elicit others from the participants' own experience. This can be done in a group using a flip chart.
Timing	90 mins session (with extra time allotted for any practical exercise - this could take up to another 90 mins).
Tools	PPT Presentations Flip Chart Presentations Evaluation grid sample Handouts
Other Resources	Projector Flip Chart
References	*Passing the Evaluation*, p. 64 Toolkit: *Passing the Evaluation*, p.102-105

Tools: Presentations

Below you will find some information that you can make into PowerPoint Presentations for your training sessions. The information provided covers 3 topics: i) understanding the Evaluation Process; ii) checking your application; and (iii) preparing a competitive proposal. These notes are designed to help you formulate your presentations in an effective and efficient manner. While preparing your presentations, feel free to review Passing the Evaluation, p. 64

for further information on the subject and the Trainer Tips provided below in small boxes for improving your delivery.

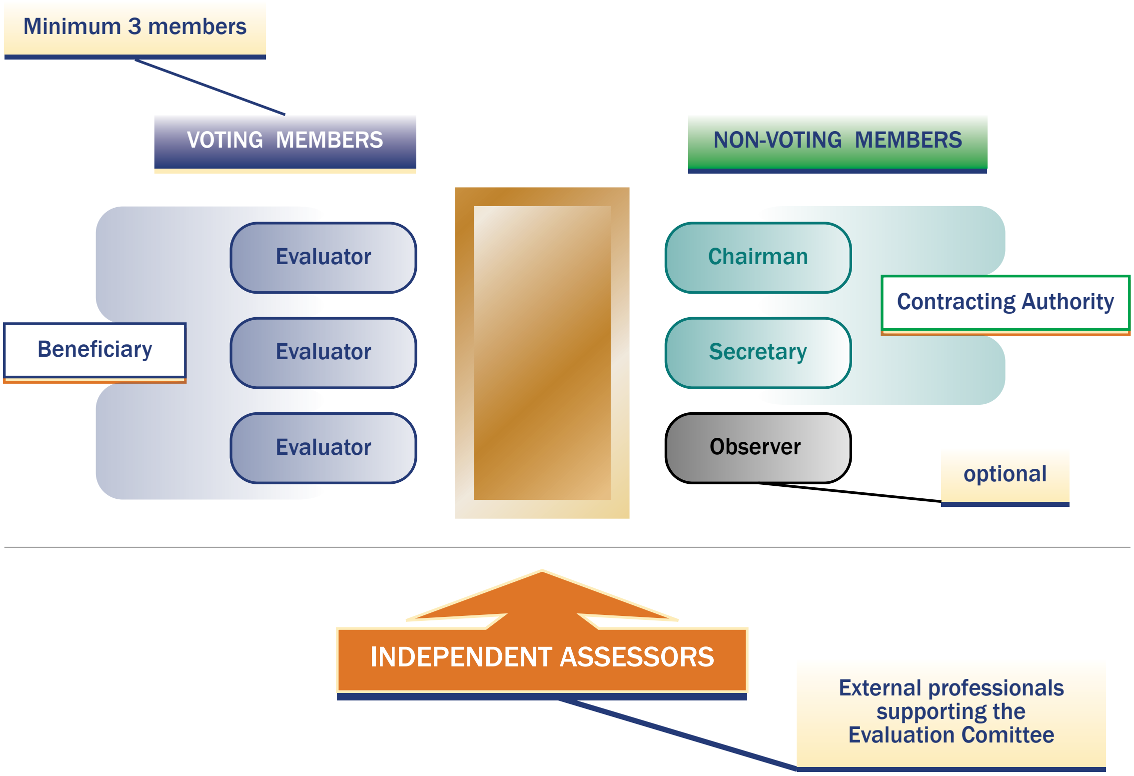
1. UNDERSTANDING THE EVALUATION PROCESS

Project Applications for any Call for Proposals funded through EU External Actions budget are checked and assessed through procedures set out in PRAG (Practical Guide to contract procedures financed from the General Budget of the European Communities in the context of external actions). It sets out the standard procedures to be used.

Available from the website at: http://ec.europa.eu/europeaid/work/procedures/implementation/practical_guide/index_en.htm

Every step of the evaluation process is defined in detail at Section 6 of PRAG, in order to ensure an accountable, transparent and fair distribution of funds available.

EVALUATION COMMITTEE



Process for Assessing Applications:

- receipt and registration of proposals;
- opening session and administrative check;
- evaluation of the concept note;
- evaluation of the application form;
- verification of eligibility;
- conclusions of the Evaluation Committee.

Before you submit your application, you need to understand every aspect of the Eligibility Criteria set out for that specific Call for Proposals (CfP).

Before you start making preparations, make sure that:

- your organization matches all the eligibility criteria and has the proof documents;

TIP:

Use the GlossaGlossary of TermsGlossary of TermsGlossary of Termsry in the Manual to explain clearly what 'Beneficiary', 'Contracting Authority' and other terms stand for since they may create confusion for the grant beneficiaries.

- your partners match all the eligibility criteria and have the proof documents;
- your proposed action takes place at a location identified as eligible under that CfP;
- the type and cost of your proposed action is considered as eligible.

TIP:

Give an example from one Call for Proposals which your applicants would be interested in.

Remember!

The Assessors and Evaluators read many project proposals in a rather short period. Before they appreciate the good intent and innovative ideas in your proposal, they automatically check the administrative compliance and the eligibility criteria. Make sure that you meet them all in order to get to the second stage.

2. CHECKING YOUR APPLICATION

A practical way to ensure getting a higher score in the evaluation process is to evaluate your applications first by yourself!

In every Call for Proposals (CfP), applicants are provided with an Evaluation Grid. This grid is used to score your applications by Evaluators/Assessors.

The Evaluation Grid consists of 5 subsections:

- financial and operational capacity: Your technical, financial and project management capacity and experiences are scored;
- relevance: Your proposal is evaluated against the objectives and priorities of that CfP, the needs and constraints of the target country or region in general and the needs and constraints of the target groups and final beneficiaries in particular;
- methodology: Practicality and consistency of your proposed activities in relation to the objectives, purpose and expected results, coherence of the overall design of your proposal, partners' level of involvement, feasibility of your action plan and your objectively verifiable indicators are scored;
- sustainability: The likelihood of having a tangible impact on the target groups, having multiplier effects, ensuring financial and institutional sustainability are assessed;

TIP:

You may present some slides showing the Evaluation Grid and/ or use the relevant handout given below while going through the table.

- budget and cost-effectiveness: The ratio between the estimated costs and the expected results, and the necessity of the proposed expenditure in relation to the implementation of the project are evaluated.

3. PREPARING A COMPETITIVE PROPOSAL

Every Call for Proposals (CfP) receives hundreds of applications and only a few can be awarded. In order to get ahead in this competitive process bear in mind the following tips:

- do not apply for a CfP that is not in line with mission of your organisation;
- demonstrate strong relevance to the CfP priorities in your proposal;
- address real needs of your target group. Do not exaggerate one need in order to fit it into your project rationale;
- involve the project beneficiaries in the project formulation process, especially when identifying the needs;
- emphasize your previous experience with the proposed activities;
- if you don't have relevant experience, explain with concrete steps how you'll manage the activity and explain how you'll overcome your lack of experience;
- include your partners' different experience and knowledge in the preparation process. It will strengthen different aspects of your project;
- do not be too ambitious. Your objectives should be feasible;
- link your activities with each need and explain how you will meet the needs and thus reach your project objectives clearly;
- present the monitoring and evaluation tools that you'll be using during project implementation;
- be innovative. Do not apply in order to repeat what you already have done. In most cases similar projects are crosschecked;
- do not 'copy and paste' someone else's project design;
- give a strong argument on the sustainability of your action.

TIP:

This is a very practical subject. Lead your trainees in sharing their experiences about rejected projects. Guide them to understand why those applications were weak and what they would do to improve them now.

Remember!

The EU's financing opportunities are only a tool for realizing your organization's mission and goals. As with any other tool, the trick is to learn how to use it properly.

Learn from your mistakes and make use of your rejected projects. Find ways to learn from your shortcomings in that proposal and do not repeat them next time you apply for a grant.

Tools: Handouts

Below you will find a series of pieces of information that you can use as handouts during your training sessions. These handouts are complementary to the PowerPoint presentations mentioned above. Remember not to overwhelm your trainees with too much information at once and present these handouts in a timely manner. For further information on how to utilize these handouts please refer to Passing the Evaluation, p. 64.

Checklist for administrative compliance:

BEFORE SENDING YOUR PROPOSAL, PLEASE CHECK THAT EACH OF THE FOLLOWING COMPONENTS IS COMPLETE AND RESPECTS THE FOLLOWING CRITERIA:
1. The correct grant application form, published for this call for proposals, has been used
2. The Declaration by the applicant has been filled in and has been signed
3. The proposal is typed and is in English (or appropriate language)
4. One original and 2 copies are included
5. An electronic version of the proposal (CD-Rom) is enclosed
6. Each partner has completed and signed a partnership statement and the statements are included.
7. The budget has been laid out in the format requested, is expressed in € and is enclosed
8. The logical framework has been completed and is enclosed
9. If applicable, Concept Note is filled in, and is not longer than the advised maximum number of pages and printed in Arial 10 font.
10. Provision for contingency reserve is not higher than 5% of the subtotal direct eligible costs of the Action (Budget heading 7)
11. Administrative costs are not higher than 7% of the total direct eligible costs of the Action (Budget heading 9)
12. Equipment and supplies do not exceed the advised % of total eligible costs
13. CVs of project coordinator and other project key staff are included, indicating their position or role in the project in EU format
PART 2 (ELIGIBILITY)
14. The duration of the action is equal to or lower than the maximum allowed number of months
15. The duration of the action is equal to or higher than the minimum allowed number of months
16. The requested contribution is equal to or higher than EURO xxx.000 (the minimum allowed)
17. The requested contribution is equal to or lower than EURO xxxx.000 (the maximum allowed)
18. The requested contribution is equal to or higher than the minimum percentage required for the total eligible costs

Evaluation grid:

Section	Maximum Score
1. Financial and operational capacity[1]	**20**
1.1 Do the applicant and, if applicable, partners have sufficient experience of project management?	5
1.2 Do the applicant and, if applicable partners have sufficient technical expertise? (notably knowledge of the issues to be addressed.)	5
1.3 Do the applicant and, if applicable, partners have sufficient management capacity? (including staff, equipment and ability to handle the budget for the action)?	5
1.4 Does the applicant have stable and sufficient sources of finance?	5
2. Relevance[2]	25
2.1 How relevant is the proposal to the objectives and one or more of the priorities of the call for proposals? Note: A score of 5 (very good) will only be allocated if the proposal specifically addresses at least one priority. Note: A score of 5 (very good) will only be allocated if the proposal contains specific added-value elements, such as promotion of gender equality and equal opportunities...	5
2.2 How relevant to the particular needs and constraints of the target country/countries or region(s) is the proposal? (Including synergy with other EC initiatives and avoidance of duplication.)	5
2.3 How clearly defined and strategically chosen are those involved (final beneficiaries, target groups)? Have their needs been clearly defined and does the proposal address them appropriately? Does the application address the needs of target groups on all countries involved in the project?	5
2.4 Does the proposal involve genuine trans-national cooperation (at least one of the following: joint development, joint staffing, joint implementation, joint financing)? Proposals with more than one form of cooperation and convincing trans-national partnership (joint development, joint financing, joint staffing and joint implementing) will receive higher score.	5
2.5 Are the activities proposed likely to have a clear trans-national benefit?	5
3. Methodology	**25**
3.1 Are the activities proposed appropriate, practical, and consistent with the objectives and expected results?	5
3.2 How coherent is the overall design of the action? (in particular, does it reflect the analysis of the problems involved, take into account external factors and anticipate an evaluation?)	5

3.3 Is the partners' and/or other stakeholders' level of involvement and participation in the action satisfactory?	5
3.4 Is the action plan clear and feasible?	5
3.5 Does the proposal contain objectively verifiable indicators for the outcome of the action?	5
4. Sustainability	**15**
4.1 Is the action likely to have a tangible impact on its target groups?	5
4.2 Is the proposal likely to have multiplier effects? (including scope for replication and extension of the outcome of the action and dissemination of information.)	5
4.3 Are the expected results of the proposed action sustainable: - financially (how will the activities be financed after the funding ends?) - institutionally (will structures allowing the activities to continue be in place at the end of the action? Will there be local "ownership" of the results of the action?) - at policy level (where applicable) (what will be the structural impact of the action e.g. will it lead to improved legislation, codes of conduct, methods, etc?)? - environmentally (will the action have a negative/positive environmental impact?)	5
5. Budget and cost-effectiveness	**15**
5.1 is the ratio between the estimated costs and the expected results satisfactory?	5
5.2 Is the proposed expenditure necessary for the implementation of the action?	5 x 2
Maximum total score	**100**

[1] *If the total average score is less than 12 points for section 1, the application will be rejected.*
[2] *If the total average score is less than 20 points for section 2, the application will be rejected.*

Tools: Exercises and Templates

EXERCISE: A 'Mock' Assessment

If you're running a training programme in a 'workshop' style and have enough time and other resources, it can be very useful to run this exercise. However, be aware that this exercise needs careful preparation and plenty of time to implement.

Provide your participants with a fully completed Grant Application Form (either a made-up one or a copy of a real Application - but remember for the latter you should have permission from the owner of the Application to use it as a training tool) and a set of relevant Application Guidelines and Evaluation Grid. Give participants plenty of time to scan through both the Guidelines and Application Form (20+ minutes). Then divide the participants into 5 groups and ask each group to 'evaluate' a particular section of the Application. One group should evaluate the Financial/ Operational Capacity, one the Relevance, one the Methodology and so on. Give your participants 20 minutes to discuss and score their part of the Application and note down comments. Then in plenary each group should give their score and comments on the Application. This plenary discussion will take at least 30 minutes.

Managing EU Grant Contracts

Training Preparation

Once a CSO has been awarded a EU-funded grant and signed a grant contract, it then has to shift from project preparation to project implementation. This entails a whole different set of skills and requires knowledge about a range of project management and EU procedural issues. These in themselves are often the subject of a detailed training, however, with this Toolkit and accompanying Manual, we are just highlighting certain critical aspects of managing EU funds that can be the focus of a half-day or even day-long training programme. As with many of the other topics, provision of training on this topic is best done through a mix of presentations and discussion amongst participants in order to share experiences on the 'dos' and 'don'ts' of managing EU-funded projects.

Learning Objectives	▪ Participants have a clear understanding of the concept of a 'grant' and the implications of signing a grant contract; ▪ basic knowledge of the principles and contents of PRAG; ▪ raised awareness to the 'dos' and 'don'ts' of managing an EU grant contract; ▪ improved capacity for following EU visibility guidelines.
Methodology	Formally present the concept of a 'grant' and the conditionality of grant contracts, and then introduce the EU's procurement guidelines (PRAG). Thereafter in a plenary discussion ask the participants to share their experience and understanding of PRAG. This can then lead into a second formal presentation of what is contained within a grant contract - simply go through a sample grant contract - and provide examples of what are 'minor' and 'major' modifications to the contract. Use a small group exercise to get participants to think about their own experience and to draft a 'top ten' list of 'dos' and 'don'ts' of managing EU funds. (NB. If participants are being trained in relation to a specific Call for Proposals, ask the Contracting Authority to provide any relevant Implementation Manual or to give advice on any particular Special Conditions of the Call.) A short session can be run to introduce the EU's Visibility Guidelines and to look at some examples of good/poor visibility actions. And for fun, you can do a quick 'pop quiz' exercise to test participants understanding of the Guidelines.
Timing	Three sessions of 90 minutes each can cover the methodology described above. But if time is short it is possible to reduce the time for discussion and focus more on presenting the information and cover the important aspects in 120 minutes.
Tools	Projector, PPT slides, Flip Chart, Copy of a Grant Contract (hard and digital), Copy of PRAG (digital version to show on screen).
Other Resources	
References	*Managing an EU Grant Contract,* p. 71 *Toolkit: Managing an EU Grant Contract, p. 106 - 114*

Tools: Presentations

Below you can find some information that you can make into PowerPoint Presentations for your training sessions. The information provided covers 4 topics: i) what is a grant?; ii) modifying a grant contract; (iii) procurement rules; and iv) visibility rules. These notes are designed to help you formulate your presentations in an effective and efficient manner. While preparing your presentations, feel free to review Managing an EU Grant Contract, p. 71 for further information on the subject and the Trainer Tips provided below in small boxes for improving your delivery.

1. WHAT IS A GRANT?

A ‘grant’, according to EU rules and principles:

- is a payment of a non-commercial nature by the Contracting Authority to a specific beneficiary to implement an action intended to help achieve an objective forming part of a European Union policy;
- funds support activities of the beneficiary;
- funds cover only eligible incurred costs;
- is NOT a gift, but a contribution of funding with predefined conditions.

These conditions are set out in the Grant Contract that is signed between the Grant Beneficiary (CSO awarded with the grant) and the Contracting Authority.

It is essential that CSOs have a clear understanding of the Grant Contract and of PRAG- the guidelines which determine the way in which EU funds are spent outside of the EU.

TIP:

Briefly explain the structure of the Contracting Authority in your country/region.

What is PRAG?

The Practical Guidelines for contractual/procurement procedures involving EU funds for external assistance is commonly known as PRAG.

PRAG guides how we can spend EU funds and how we need to be accountable, transparent and fair, and get the ‘best value’. Therefore, it’s a key tool in project implementation. The essential parts of PRAG that relate to procurement under grant contracts are often summarised in Grant Implementation Manuals.

Available from the website at:
http://ec.europa.eu/europeaid/work/procedures/implementation/practical_guide/index_en.htm

Why PRAG can be a challenge for CSOs?

- CSOs are not generally structured to manage Public Funds and often have weak capacity for managing finances;
- the language of PRAG is not always easy to understand;
- as PRAG offers 'guidelines' rather than 'rules', different stakeholders may interpret aspects of the guidelines in different ways.

BUT, these challenges must be overcome; otherwise CSOs may be in danger of not having all their grant-project costs recovered.

Parts of Grant Contract:

Special Conditions

Annex I : Description of the Action
Annex II : General Conditions
Annex III : Budget for the Action
Annex IV : Contract-award Procedures
Annex V: Standard Request Templates for Payment and Financial Identification Form
Annex VI : Template for Reports
Annex VII: Expenditure Verification Report

Managing the Contract:

Managing the grant contract should be an integrated part of the overall project management. Pay special attention to:

- making any changes to the contract;
- procurement of any goods or services above 10,000 Euros;
- keeping records and reporting.

2. MODIFYING A GRANT CONTRACT

Due to the time difference between submission of the proposal and implementation of the project, making changes in the Grant Contract may sometimes be inevitable.

BUT, there are strict procedures to be followed before any changes can be made! So make sure that you learn all the rules on modifying a grant contract.

Basic Principles on Modifying a Grant Contract:

- for the acceptance of grant contract modifications, the Grant Beneficiary must submit a letter of notification or request to the Contracting Authority;
- the modifications must not have the purpose of altering the objectives of the project or be contrary to the equal treatment of applicants;
- modifications cannot be made retroactively;
- the maximum amount of the grant may not be increased;
- any modification extending the performance period of the contract must be such that implementation and final payments can be completed before the expiry of the financing decision;
- requests for contract modifications to grant contracts must allow an adequate time-limit (minimum 30 days) for the addendum to be signed before the modifications are intended to enter into force.

There are two Types of Modifications/Changes:

- minor changes: you may apply without the prior approval of your Contracting Authority;
- major changes: require a formal addendum to the Grant Contract.

Examples of Minor Changes:

- changes in activities or budget that do not affect the basic purpose of the project;
- transfer between budget headings involving a variation of 15% or less;
- changes of address or phone number;
- changes of bank account;
- change of project manager or key experts;
- changes to HR unit rates.

TIP:

Challenge your trainees with examples of changes and ask whether they are minor or major and what procedure they should follow for making the change.

Examples of Major Changes:

- significant changes in activities affecting the basic purpose and indicators of the project;
- transfer amongst budget headings outside the limits of minor modification (15%);
- addition of a new budget line or spending zero against a budget line;
- change of Project partners (addition or replacement);
- extension or early closing of Contract;
- changes in grant beneficiary status or name.

3. PROCUREMENT RULES

All stakeholders engaged in an EU-funded project take on the responsibility of managing Public Funds. To help fulfil these responsibilities, the EC provides PRAG. Thus, Grant Beneficiaries MUST:

- use the models published on the Commission's website, relating to external actions;
- ensure time-limits for receipt of tenders and requests to participate must be long enough to allow a reasonable and appropriate period to prepare and submit tenders;
- allow requests to participate and tenders declared as satisfying the requirements are to be evaluated and ranked by an Evaluation Committee.

> Remember!
>
> Preparing a 'Procurement Plan' when you prepare the Work Plan and Budget of your project will help you out in later stages of project implementation.

Basic Principles in Procurement

Be aware of what PRAG says about:

- Rule of Origin;
- Country of Origin;
- Derogation;
- Grounds for Exclusion;
- Conflict of Interest;
- Retroactivity;
- Fair competition;
- Ethics Clauses;
- Eligibility;
- Penalties;
- Use of Standard Documents;
- Record Keeping.

> **TIP:**
>
> Encourage your trainees in discussing what these mean and give concrete examples.

Types of Procurement Procedures:

Service Contracts	Supply Contracts	Works Contracts
	Contracts of €150.000 or more International open tender procedure	**Contracts of €5.000.000 of more** **International open tender procedure**
Contracts of €200.000 or more International restricted tender procedure	**Contracts between €60.000 and €150.000** Local open tender procedure	**Contracts between €300.000 and €5.000.000** Local open tender procedure
Contracts under €200.000 but more than €10.000 Framework contracts Competitive negotiated procedure (Beneficiary consults at least 3 service providers)	**Contracts under €60.000 but more than €10.000** Competitive negotiated procedure (Beneficiary consults at least 3 service providers)	**Contracts under €300.000 but more than €10.000** Competitive negotiated procedure (Beneficiary consults at least 3 contractors)
Contracts with a value of €10.000 or less Single tender	**Contracts with a value of €10.000 or less** Single tender	**Contracts with a value of €10.000 or less** Single tender

The author leading TACSO's regional training on Developing and Managing EU Projects

4. VISIBILITY RULES

The grant beneficiaries must take the necessary measures to ensure the visibility of the EU's co-financing.

All the rules that need to be followed for ensuring this visibility are presented in the EU's Communication and Visibility Manual for EU External Actions.

Available from the EuropeAid website at: http://ec.europa.eu/europeaid/work/visibility/index_en.htm

Visibility Rules:

- ensures that projects that are wholly or partially funded by the EU visibly acknowledge the support of the EU;
- covers the written and visual identity of the EU;
- are prepared to be used in briefings, newsletters, press conferences, presentations, invitations, signs, commemorative plaques and all other items used to highlight the EU and the co-financing country.

TIP:

Show snapshots of the Manual and/or CSO websites following the Visibility Rules for a certain project.

Remember!

The use of the visibility guidelines is compulsory.

The Manual also contains Practical Advice on:

- identifying your target audience;
- drafting a Communications Plan;
- templates and EU Visual Identity Elements;
- seeking advice from the EC - Delegations have dedicated Communications Dept.;
- materials that do not meet the Visibility requirements may incur costs considered as ineligible!

Tools: Handouts

Handy Hints from CSO Practitioners on Managing EU-Funded Projects

During the compilation of this Manual, the authors received lots of great, practical advice from CSOs from across the Western Balkans and Turkey. Below is a summary of the top twelve tips from those CSOs.

'Do's'

- establish a functional project team and ensure that those team members that are involved in the design and drafting of the project are also involved in the implementation. The project team must also include leadership that will be accountable for the project's progress and reporting;
- set-up and maintain an organised system of administration for the project, and pay particular attention to keeping financial records - remember that you must have valid receipts for all the project expenditure;
- make sure that your organisation has enough cashflow to enable you to start-up your project and implement activities prior to you receiving instalments of the grant, but don't make any expenditure until you've signed the grant contract;
- read your grant contract carefully and in detail;
- keep your target group and participants in your project activities well informed about the project and ask them for their feedback;
- stay well informed about what's going on in your region and sector, so that your project management can make any timely adjustments in response to any changes in the environment of the project. And do remember to seek advice from the Contracting Authority about any changes to your project;
- be aware that your grant contract is for a limited duration and therefore you need to carefully plan the implementation of activities and give yourselves enough time to complete not only the activities, but also the reporting.

'Don'ts'

- don't wait until the middle or end of the project to think about how the achievements of the project will be evaluated, but ensure that the project has a well designed Monitoring and Evaluation framework from the very beginning;
- don't hesitate to ask any external Monitors of your EU-funded grant for advice and assistance in the implementation and administration of your project. The external Monitors are very well informed and usually very experienced in the management of EU-funded projects and are there to help you;
- don't forget about your partners. Involve them in every stage of the project, particularly when you need advice on project management and reporting issues;
- don't wait until the last minute to do your project reporting, but draft brief reports after every project activity and use these to compile your formal reports to the Contracting Authority. Also keep your financial reporting fully up to date, so that every activity report has matching book-keeping, complete with all expenditure receipts;
- don't try to change the objectives or purpose of your project as this will contradict the terms and conditions of your grant contract.

Eligible costs:

Budget Heading	Eligible Expenditures
1. Human Resources	The amounts budgeted under this budget heading may be used for payment of salaries and fees for staff contracted by the Grant Beneficiary and for partners' staff. Sub-contracted services (payment to companies under the service contracts tendered following the EC procedures) cannot be claimed under this budget heading. The cost of staff assigned must include actual salaries plus social security charges and other remuneration-related costs. For detailed information of human resources expenditures see the reference document in the contract Annexes. Salaries and costs must not exceed those normally borne by the Grant Beneficiary or its partners. Per diems are allowed only for staff assigned to the project as long as they are envisaged in the project budget. Per diems cover all meal, hotel expenses and short distance travel (e.g. within the city). Per diems should be in-line with the budget and should not be higher than the EU maximum daily rates (EC website http://europa.eu.int/comm/europeaid/perdiem/liste1_en.htm). Per diems are based either on actual costs or fixed rates, but in both cases maximum daily rates apply. Per diems are calculated on an overnight basis.
2. Travel	From the local transportation sub-heading, intercity transport expenditures within the project location may be covered. From the international travel sub-heading, transport expenditure of experts who travel abroad for the needs of the project may be covered.
3. Equipment and Supplies	The purchase cost of equipment and supplies are eligible provided they are included in the budget and correspond to market rates. The Beneficiary is obliged to obtain value for money, and to use the tendering procedures described in Annex IV of the Contract. For tendering procedures please see relevant procurement manuals and tender dossiers.
4. Local Office/ Project Costs	The cost cannot be used for covering costs related to main offices of the Grant Beneficiary (and partners). Costs are eligible only if a new office/ training facilities are opened for the needs of the implementation of project activities.
5. Other Costs, Services	Amounts budgeted under headings 5 and 6 may be used to cover costs for the items specified in the budget and fully sub-contracted services: publications, translation, events, etc.
6. Provision for Contingency Reserve	The Contingency reserve can only be used for unexpected expenditures incurred during the implementation of the grant contract with the prior approval of the Contracting Authority.
7. Administrative Costs	A percentage of the final approved total direct eligible costs may be claimed as indirect costs to cover the administrative overheads incurred by the Grant Beneficiary. The costs are eligible provided that: 1. They do not exceed 7% of the direct costs; 2. They do not include costs assigned to another heading of the budget; 3. Their eligibility should conform to items 14, 16 and 17 of the general conditions; 4. The 7% (or amount requested) of the direct cost will be re-calculated at the end of the project based on actual costs.

Procurement as per PRAG

Procurement is the timely acquisition of goods, works and services while addressing the following: the objectives of the project; fairness, integrity and transparency through competition; economy and effectiveness; best value for money.

Strict rules need to be followed in each procurement procedure in order to acquire the best value for money. The following principles should be taken into account for a good procurement:

No discrimination

There should be no discrimination against products, services, suppliers, contractors or service-providers on the grounds of nationality. There may be however disqualifications based on technical grounds, or against quality and/or safety factors, but these can, and should, be objectively assessed.

Fair competition

There should always be a competition for the award of contracts, unless there is a strong and objective reason for not holding a competition.

There must be no distortion of competition in discussions with actual or potential participants in contract award procedures. This means that all tenderers must be provided the same information and the same opportunities to come up with winning bids.

Any firm or expert that have participated in the preparation of a project or in drafting the tender file must be excluded from participating in tenders based on this preparatory work, as this would constitute unfair competition.

Clear specifications

Tenderers cannot compete effectively unless they know precisely the requirements of the purchaser. Therefore, specifications of requirements ("Technical Specifications" in case of supplies or works tenders, "Terms of Reference" in case service tenders) should be by reference to recognised technical specifications and, where required, quality assurance standards, with appropriate levels of certification.

Effective publicity (announcement)

Any tendering process is unlikely to be successful if the best potential tenderers do not get to hear of requirements. Effective publicity will ensure the dissemination of this information. This is particularly important for publicly funded procurement, where typically the purchasers are not experts in the field. This is where use of the Internet is increasingly important, but it is vital that tenderers know where to go for their information.

It is also necessary to publish details of the decisions on contracts awarded. Further, to improve the skills and efficiency of tenderers, those who request it should be debriefed on why they were, or were not, selected to bid, and why they were successful or unsuccessful in winning the contract.

Adequate timescales

Another vital principle is that bidders are given sufficient time to respond to advertisements expressing an interest in the purchaser's requirement, to respond to invitations to participate in the bidding and to prepare and submit their offers. Under EU PRAG, for example, local open tenders (those advertised in Turkey) require at least 30 calendar days between the date of publication of the advertisement and the submission deadline for tenders.

Use of relevant objective criteria

It is vital that the criteria used for the elimination of unsuitable candidates, the selection of participants in contract award procedures and the award of contracts on the basis of the offer(s) economically most advantageous to the purchaser are both objective and relevant to the requirement. These requirements are defined in the "Terms of Reference" (in the case of service contracts) or the "Technical Specifications" (for supply or works contracts).

Tools: Exercises and Templates

Exercise: Pop Quiz

This exercise is an easy way to demonstrate the rules for using proper background and the third colour. It also indicates that every time an EU flag and/or logo are used, it is strongly advised to check the Guidelines before preparing a publication. Otherwise a simple negligence of the visibility rules may cause the CSOs additional printing costs, since any violation of the rules will be checked by their Contracting Authority.

It is advised that you present the quiz either with a coloured printout or on a projector. After you explain the basic rules about visibility, present your trainees with this quiz and ask them to choose which option or options are in line with the EU Visibility rules, if any.

(Please note that the examples used below ONLY relate to Turkey - for the other countries you need to find relevant examples.)

Only after you get everyone's replies, remind them that if use of a third colour is required, then the only approved colour is gray/black. Also, the flag should preferably be printed on a white background. Multicoloured backgrounds should be avoided, especially those involving a colour that clashes with the blue. Where a coloured background is unavoidable, a white border with a thickness equal to 1/25th of the height of the rectangle must be used; thus leaving option E the only right answer.

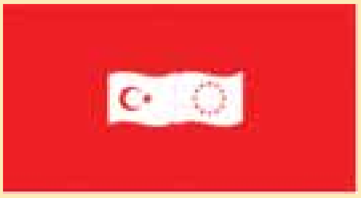
POP QUIZ:

Which one represents the proper use of EU logo:

a)

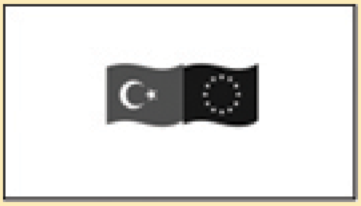
b)

c)



d)

e)



f)

TEMPLATE: A Procurement Plan

Project Name	**Name of the tender 1** Dates for Tender 1	**Name of the tender 2** Dates for Tender 2	**Name of the tender 3** Dates for Tender 3
Preparation of tender dossier			
Expected date for sending the tender dossier to the Contracting Authority or Grant Monitors for checking			
Publication of forecast (if applicable)			
Publication of procurement notice			
Submission deadline			
Opening session			
Evaluation			
Expected date for sending the Evaluation Report to the Contracting Authority or Grant Monitors for checking			
Contract signature			
Expected delivery date			
Provisional acceptance date			

TEMPLATE: A Communication Strategy

General Communication Strategy

Objectives

1. Overall communication objectives

2. Target groups

   - Within the district or country or countries where the action is implemented
   - Within the EU (as applicable)

3. Specific objectives for each target group, related to the action's objectives and the phases of the project cycle.

Examples of communication objectives:

- *to ensure that the beneficiary population is aware of the roles of the partner and of the EU in the activity*
- *to raise awareness among the host country population or in Europe of the roles of the partner and of the EU in delivering aid in a particular context*
- *to raise awareness of how the EU and the partner work together to support education, health, environment, etc.*

Communication Activities

1. Main activities that will take place during the period covered by the communication and visibility plan.

Include details of:

- *the nature of the activities*
- *those responsible for delivering the activities*

2. Communication tools chosen.

Include details of the advantages of particular tools such as the media, advertising and events in the local context

Success Indicators

Include some indicators that can be measured to see whether the communication and promotional activities are having any impact or not

Resources

Ensure that the appropriate project resources are available (human and financial) to support the communication activities

Compliance Monitoring and Reporting on EU Funds

Training Preparation

As with section 'E' in this Toolkit, this section does not provide comprehensive training materials on the subject, but rather is a way of introducing 'Compliance Monitoring and Reporting'. When preparing any training sessions on this subject it is advisable to research and include as much local information as possible, as different Contracting Authorities and different Grant Schemes will have slightly different approaches to monitoring and different reporting schedules and requirements.

Learning Objectives	▪ Understand the difference between Monitoring, Evaluation and Audit; ▪ have strengthened knowledge as to the expectations from the side of the Contracting Authority of monitoring procedures; ▪ understand the basic reporting requirements of EU-funded grants.
Methodology	Introduce the topic by asking participants to consider their own definitions of the terms Monitoring, Evaluation, and Audit. This can be done in small groups by getting participants to fill in a matrix to describe the 'what, when, by whom, what for' of the three topics. Follow the introduction with a formal presentation of the EU's approach to Monitoring and Evaluation and the difference between monitoring for compliance and performance monitoring. Then present what happens during an external monitoring visit. In plenary participants can give their own experiences. Make a formal presentation of the EU reporting requirements and highlight what CSOs find most difficult. Some of the 'dos' and don'ts' listed in the Manual sections will be useful here. In addition to the formal requirements of the EU, it is also useful (time permitting) to allow participants to share their own experiences on how their organisations record what they have learned implementing and reporting on projects.
Timing	90 minutes to run a session on introducing the M&E terms and concepts and presenting the process of Monitoring visits. 45 minutes to go through the standard reporting requirements.
Tools	Projector PPT slides Flip Chart Handouts
Other Resources	
References	*Compliance Monitoring and Reporting on EU Funds*, p. 76 Toolkit: *Compliance Monitoring and Reporting on EU Funds*, p. 115

Tools: Presentations

Below you can find some sets of information that you can make into PowerPoint Presentations for your training sessions. The information provided covers 3 topics: i) getting ready for monitoring visits; ii) reporting and archiving; and (iii) lessons learnt. These notes are designed to help you formulate your presentations in an effective and efficient manner. While preparing your presentations, feel free to review Compliance Monitoring and Reporting on EU Funds, p. 76

for further information on the subject and the Trainer Tips provided below in small boxes for improving your delivery.

1. GETTING READY FOR MONITORING VISITS

During the implementation of a grant-assisted project, there will be one or two monitoring visits made by monitors external to the CSO arranged through the Contracting Authority (CA).

In addition to the external monitors' visits, the CA will ask for regular monitoring information and progress reports.

What is the purpose of monitoring visits?

- to verify that grants are used for their stated purpose in the contract;
- to ensure that the projects are implemented in compliance with EU procedures;
- to identify problems arising during the project implementation;
- to provide continuous support to beneficiaries.

What will an external project monitor look for?

- were the correct procedures used for the tender value?
- are the equipment/supplies there?
- are they being used for the purpose they were intended?
- do the serial numbers match the invoice?
- is the EU being given appropriate visibility?
- what will happen at the end of the project?
- check for a list of equipment.

2. REPORTING AND ARCHIVING

The reporting process is usually very challenging for many CSOs. Yet it is a very important process since any failure to follow the process properly will lead to returning the grant partially or completely.

You can find the full list of required documents in your Grant Contract and PRAG.

Summary of the required Technical and Financial Reports:
Obligatory Technical Reports (Interim and Final):

- information on progress of activities;
- information on Project/Programme results;
- information on programme/project impact;
- programme follows the structure of the reporting template.
- description of Activities;
- if any modifications have occurred these should be well documented and justified!
- detailed description of projects achieved;
- level of achievement of the project stated objectives;
- may include annexes.

TIP:

If the training is designed for a specific Grant Programme, adapt its requirements for reporting here, instead of giving summarized information.

Obligatory Financial Reports (usually 'Final' only):

Financial Reports include:

- project costs;
- in table formats which are standardised;
- copies of supporting documents are requested;
- copies of Time-sheets.

Checking of financial reports against the contract and the supporting documentation:

- eligible expenditure;
- consistent with application;
- correct exchange rates being used;
- appropriate supporting documentation;
- VAT is not included;
- any significant deviance from planned expenditure.

Remember!

Make sure you fully understand your reporting and record keeping responsibilities. Any negligence in this may cause you to return the grant partially or completely.

3. LESSONS LEARNT

Monitoring and evaluation not only measures how well you are doing, but also helps you to be more effective. Evaluation has two main purposes:

- learning and development;
- accountability.

For learning and development:

Monitoring and evaluating your services will help you assess how well you are doing in order to help you do it better. It is about asking what has happened and why, and what is and what is not working.

For accountability - to show others that you are effective:

Funders (like the EU) and other 'stakeholders' want to know whether a project has spent its money appropriately. There is pressure from funders to provide them with evidence of success. Many projects have to respond to this demand in order to survive.

How the EU collects information during and after project implementation:

	Monitoring and regular review	Evaluation	Audit
Who?	Internal management responsibility – all levels	Usually incorporates external inputs (objectivity)	Incorporates external inputs
When?	Ongoing	Periodic - mid-term, completion, ex-post ongoing and upon	Ex-ante (system reviews), completion
Why?	Check progress, take remedial action, update plans	Learn broad lessons applicable to other programmes/projects and as an input to policy review Provide accountability	Provide assurance and accountability to stakeholders Provide recommendations for improvement of current and future projects
Link to Logframe objective hierarchy	Inputs, activities, results	Results, purpose, overall objective (and link back to relevance)	Inputs, activities and results

Remember!

Keep records of your project experience and particularly the lessons learnt in accessing and managing EU funds. You will make use of them later in future applications and you may share it with other less experienced CSOs.

Tools: Handouts

Supporting Documents:

Main supporting documents that you should retain and present in case of an audit are:

Type of Expenditure	Supporting Documents	
All expenditure	▪ Proof of purchase invoices and receipts ▪ Proof of payment such as bank statements, debit notices, proof of settlement by the contractor ▪ Proof of delivery of services such as approved reports, proof of attending seminars, conferences and training courses (including relevant documentation and material obtained, list of attendees, certificates), etc ▪ The accounting records of the Grant Beneficiary (computerised or manual) such as general ledger, sub ledgers and payroll accounts, fixed assets registers and other relevant accounting information.	
Human Resources	▪ Term of reference/job profile ▪ Timesheets	▪ Copies of the outputs ▪ Activities reports
Travel	▪ Tickets (paper tickets and boarding passes) ▪ In case of a rented form of transport, an invoice from the supplier and summary list of distance covered	▪ For cars, a summary list of the distance covered, the average fuel consumption of the vehicles used and fuel costs.
Trainings	▪ A detailed description of the training – training modules, training hours per subject, methods, etc. ▪ Training schedule ▪ List of participants /Attendance sheets	▪ List of trainers / lecturers ▪ Feed-back questionnaires ▪ Training evaluation report
Surveys/ Studies	▪ Detailed description of the methodology ▪ Reports	
Publications	▪ Copies of publications ▪ Distribution lists	
Seminars, Working Meetings	▪ Programme ▪ List of presentations / conference reports ▪ Handouts ▪ List of participants	▪ List of speakers ▪ Minutes (if applicable) ▪ Press clippings ▪ Feed-back questionnaires (if applicable)
Supplies/ Works	▪ Invitation to tender (all documentation) ▪ All offers received ▪ Tender Opening Report ▪ Administrative Compliance Grid	▪ Technical Evaluation Grid ▪ Evaluation Report ▪ Shipping bills

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