Report of the
EU DEAR Projects 'Exchange Hub'
Brussels, 15 & 16 October 2019

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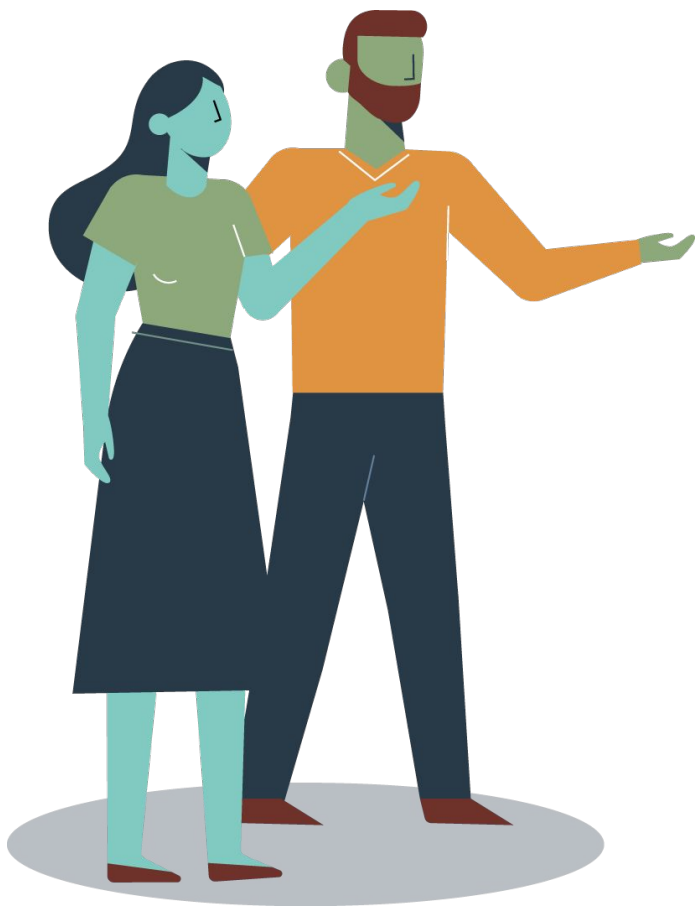DEAR
DEVELOPMENT EDUCATION
AND AWARENESS RAISING

Summary of the capitalisation workshop with the 25 European Commission supported DEAR projects' managers (CfP 2016)

The Hub was an opportunity:

for participants to exchange views and experiences which may be valuable to all DEAR projects to consider in their work of engaging European citizens.

The programme responded to the results of a survey of projects, identifying the main challenges project managers face.

Each of the identified issues was dealt with in one of the sessions of this Exchange Hub. Experiences of previous projects, harvested in previous events, became the Exchange Hub starting point.

Outline programme

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- Achievements and plans (slides 4 and 5)
- Challenges of working in and with partnerships (slides 8-18)
- Future of DEAR Programme (slide 19-21)
- Contacting your targets (slide 22-24)
- DEAR programme Communications (slide 25-27)
- MEL: monitoring, evaluating & learning (slides 28-35)

Participants of the Hub included project managers of the 25 EU DEAR projects currently in implementation and B1 DEAR Sector Task Managers

Identified achievements to date

- **Audience engagement**, for instance:

  - engaging MEPs in the issues of the project (incl. through breakfast meetings)

- **Public awareness raising** of issues, for example:

  - of growth of inequality as a result of privatising public services

  - of migration issues and its relationship with global development

- **Strategy development**, for instance:

  - to do with recruitment and induction of 'sub-grantees'

  - involvement of young people in project actions and as multipliers

- **Partnership development**, including:

  - between EU partners and CSOs in Brazil

- Development of **new approaches and resources**, for example:

  - use of peer learning

  - assessment of learning outcomes and of project actions

  - multi-lingual e-learning

  - inclusion of global development/Global Learning courses and research in HE curricula

[N.B. Most projects were in their second year of implementing a three-year project]

EU DEAR: what is happening and where?

On a map of Europe participants identified examples of what is being done and where, followed by a short presentation on the work being done and of project plans for the future:

- highlighting activities that may allow for networking with other projects

Amongst other things the activity resulted in :

- the setting up of a mailing group amongst the ten projects that focus on 'migration', to further explore synergies and collaboration
- a proposal of two projects ('Start the Change' and 'Snapshot from the Borders') to create a joint advocacy event in Brussels in 2020

What's good about working with partners?

- **Effectiveness and efficiency**: when different skills, experiences, resources combine
- **Learning**: from partners (skills, methods, experiences)
- **Innovation**: getting out of comfort zone, pushing boundaries, testing new (collaborative) solutions
- **Realism**: diverse perspectives make projects more realistic
- **Increased capacity:** contacts, wider geographic spread increase reach and impact
- **Credibility** improvements

… these are some of the advantages …

And what are the challenges of partnerships?

What are the challenges of partnerships?

These issues were explored at a previous Hub (Milan, June 2016) and the ideas and recommendations discussed in Milan were summarised in five areas of concern.

These five 'challenges' inspired the discussion and all DEAR project managers identified new issues and solutions

i. Dealing with different organisational cultures and expectations requires:

Developing trust between partners takes time, so

A. Invest time to get to know each other before implementation (ideally in design phase) even if it means reducing 'action' time

B. Identify what each partner wants to 'get out of' participation in the project (and check e.g. annually if the partnership is delivering)

C. Establish mutual understanding of what each partner realistically can contribute

Participants added suggestions for dealing with different cultures:

| Challenges	Recommendations
Partners don't trust each other, misperceptions	Promote dialogue and constant communication, for deeper understanding; manage expectations; focus on concrete methods
Different cultures of partner organisations	Experienced management, used to communicate with diverse people
LA: elections, in different periods	Flexibility in calendar and in the implementation of activities
Different legislations in countries	Flexible methodology to maintain & reach project objective
LA leads take long time to transfer funds	Prioritise transfers to partners with no possibility to anticipate funds
Different expectations of what will be done together, in coordination	Understand partners priorities, be flexible/adjust plan, choose activities that can be voluntary while others are central
Diverse voluntary experiences, other sectors	Support and capacity building; start with project re-design/planing, try to prolong more than 3 years; have small working groups

ii. Overcoming differences in capacities & management

How to manage those over whom you have no formal authority?

A. Create project workgroups with leads, budget and specific outputs (incl. for partner organisations that have less capacity)

B. Use peer-to-peer learning and capacity building between partners to support the less experienced

C. Use an 'activity blog' and regular reporting to keep all partners' aware of each other's contributions (i.e. in a subtle way 'naming and shaming')

D. With persistent under-contributors: re-assign work across the partnership

Further recommendations were drafted by group work, for managing different capacities:

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Challenges	Recommendations
Partners have different types and levels of capacities	Assess both expertise and needs; internal and peer-to-peer training; partner cross-support
When partners do not deliver	Assess both expertise and needs; internal and peer-to-peer training; partner cross-support
Project management & reporting overload some partners	Stronger' partners can help more frail ones; promote Lead and also other peer visits (pre-audit to prepare ROM/audits); after Y1 review M&E system
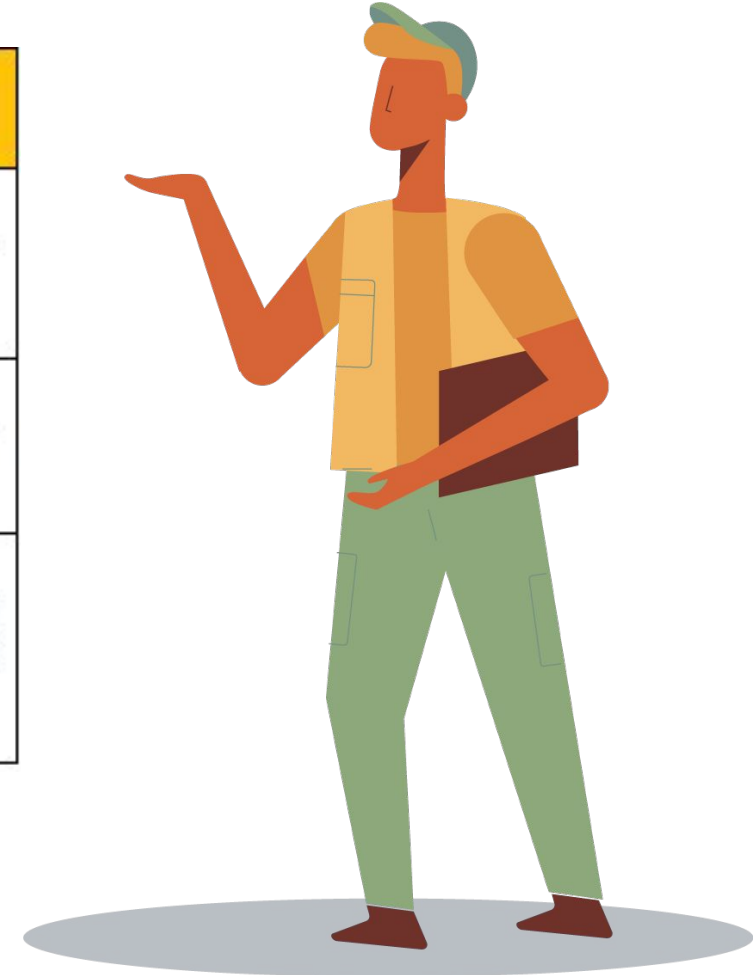
iii. Different contexts: ensuring coherence

A. Build trust through regular face-to-face and other internal communication and skills sharing

B. Develop consensus and mutual understanding on key aspects of work and ways of working

C. Clarify processes, indicators and monitoring tools

D. Collaborative solutions: use peer visits, external evaluator, SWOT/ Situation analysis
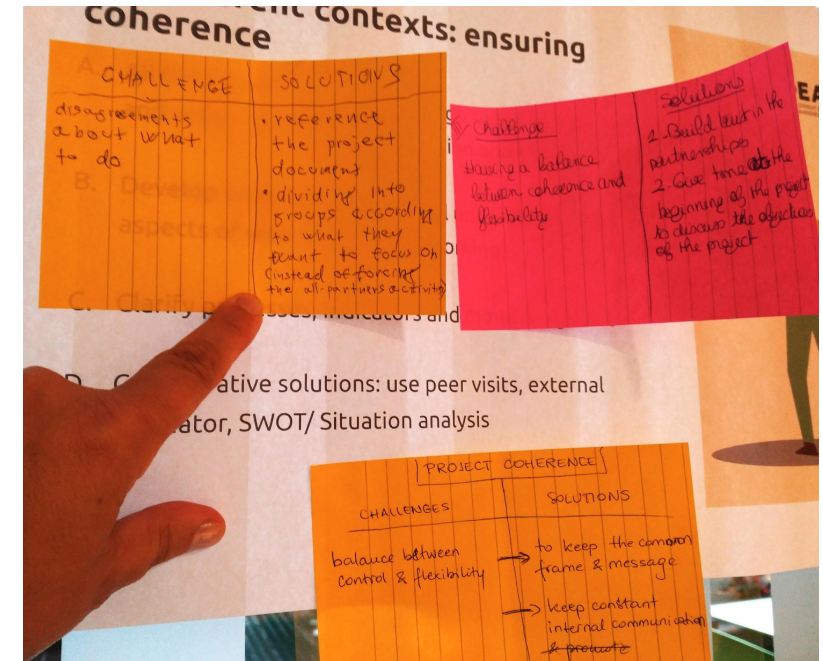
# Further recommendations from participants for ensuring coherence:

Challenges	Recommendations
Disagreements about what or how to implement	Keep project document as reference; do not force all-partners activities, create working/focus group
Balance between coherence/control and flexibility	Allow time before starting implementation: communicate & discuss, agree general frame & message> build trust

iv. Internal communication

A. Ensure all partners understand and use agreed communication tools

B. Use simple tools and templates: it helps if chosen from tools already tested and used daily by majority of partners

C. Don't communicate with everyone about everything: use e-mail, e-mail lists, targeted phone calls for communication on specific aspects with identified partners
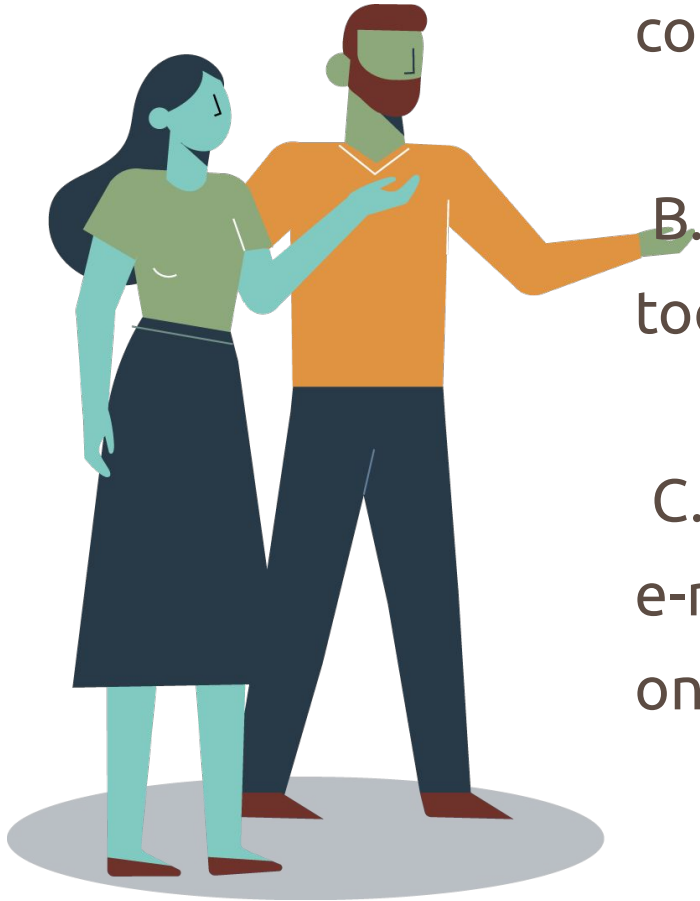
Participants added recommendations regarding internal comms:

| Challenges	Recommendations
When internal communications with all project teams is problematic	Use tools as: internal newsletter; monthly update calls; project library; PM tools as TeamWal, Asana etc.; and make regular face-to-face project meetings
Dealing with the complexity of management levels	Use differentiating levels of communications; decision-making through committees
How to communicate deadlines, methodologies or activities better?	Use tools as video tutorials; templates; regular newsletter, visits

v. Turnover of staff: how to manage the loss of information & experience?

A. Keep it simple but effective: a management, M&E and communication structure, with simple templates to register important data

B. Debrief the departing staff, write it down and discuss with new staff

C. Provide exchanges/trainings/visits/peer learning when needed

Participants added a few suggestions of how to deal with turnover of staff

Challenges	Recommendations
Prevent staff turnover	Recruit project team among permanent staff (and replace those) in order to keep the experience within the organisation;
Avoid overload and burn-out	Ensure that strong systems spread the load (involve multiple staff but one core interlocutor); invest in HR wellbeing ...
Use preventive medicine	Good, effective comms, provide history and memory tools: keep records well archived and use e-tools and back-ups
Invest in minimizing turnover	(where you can - sometimes depends on senior-level competence and strategy)
When staff changes	Ensure overlapping handover
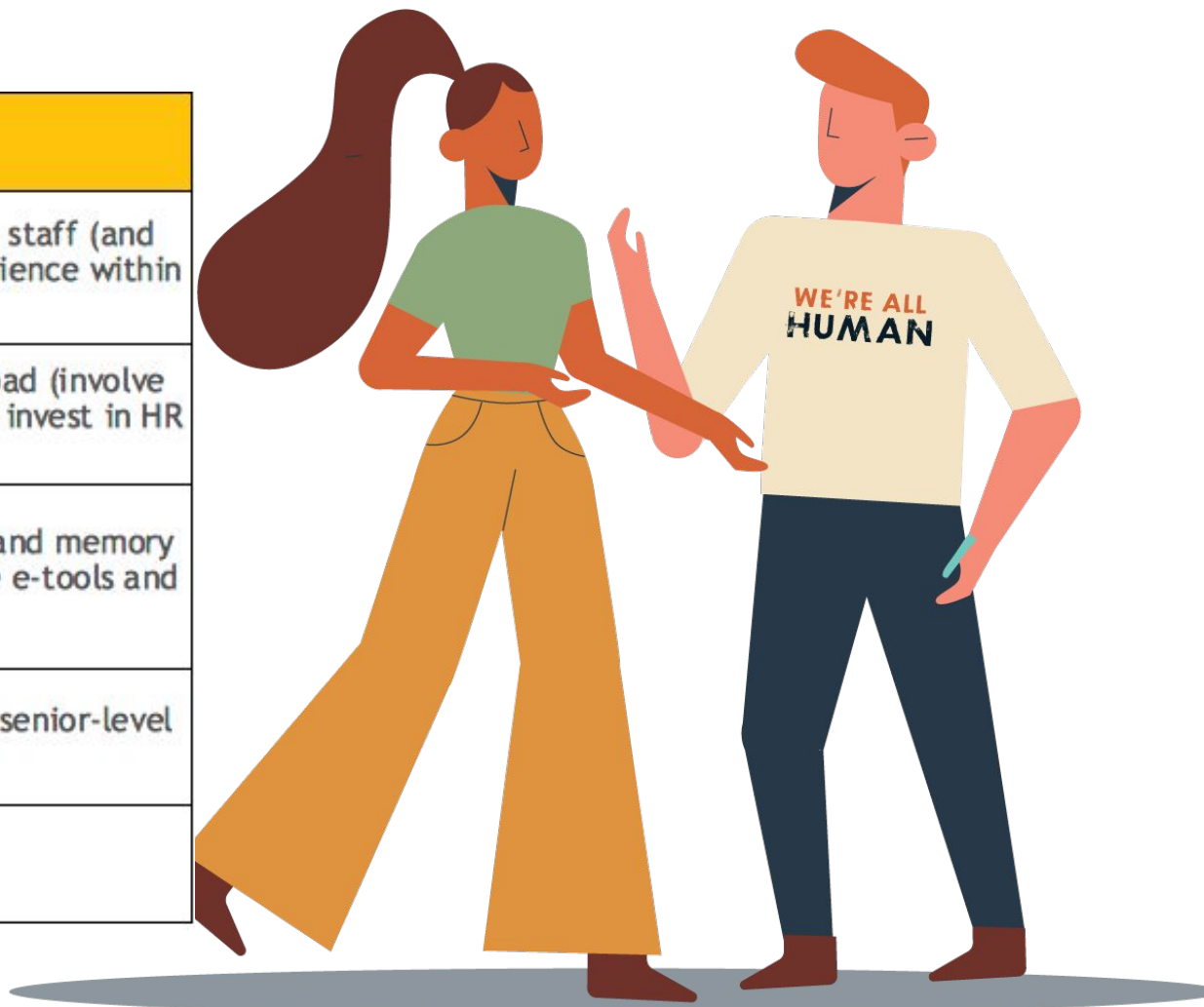
Future of DEAR

Agata Sobiech, Head of DEVCO's DEAR Sector described what is known so far about theEU's next budget cycle (2021-2027):

Proposals have been developed by the Commission, so far approved by the EU Parliament - from now on requires Council approval and detailed internal set up - not much known yet about EU DEAR funding...

Q & A

In plenary DEAR sector staff discussed a few remaining issues raised by DEAR project managers:

_What can be changed? Type of reviews, conditions and deadlines to be accepted? (e.g. replacing a partner, changing major outputs)

_How to justify changes in the financial reports? (eg. what type and length of explanations, especially for substantial and well justified changes? And how to report diverse units?)

_Is it possible to make changes in project end-date when there is an underspent?
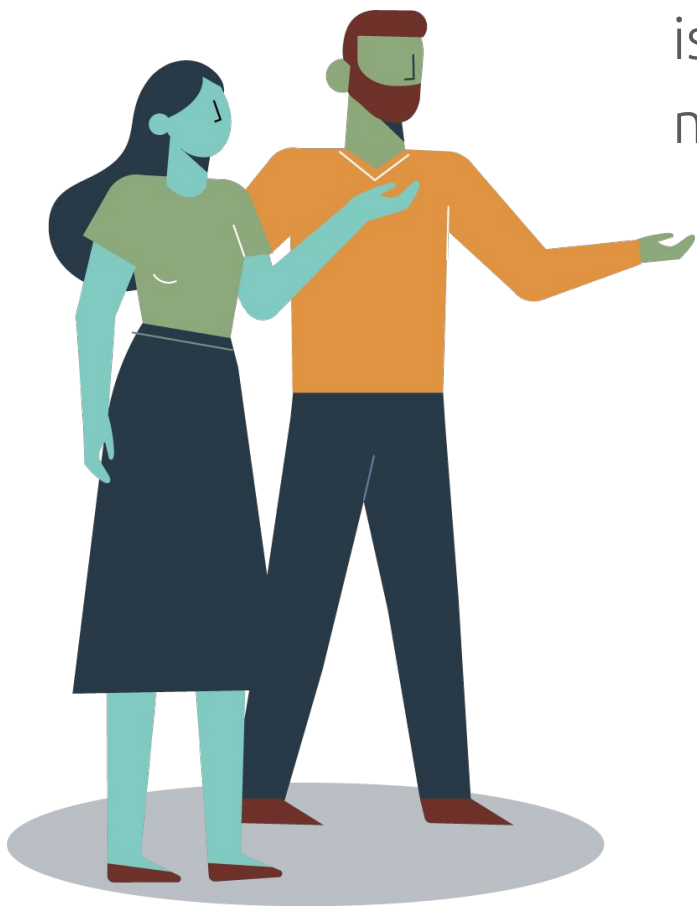
Main recommendations

- When in doubt, remember first to check your contract & annexes as well as the edition of PRAG (PRActical Guide) that is relevant to your project: https://ec.europa.eu/europeaid/funding/about-funding-and-procedures/procedures-and-practical-guide-prag_en

- Check the online learning harvested from previous events - eg. Inception Seminar 2018 report: https://europa.eu/capacity4dev/dear/documents/dear-inception-seminar-2018-final-report-0

- Check the summary paper 'Planning & Implementing EU DEAR projects' ideas for a sound management, coordination and M&E: https://europa.eu/capacity4dev/dear/documents/planning-and-implementing-eu-dear-projects-0

- Hub reports, reference documents and papers are available at https://europa.eu/capacity4dev/dear

Challenges of contacting your targets

Happy to be contacted?

MPs, local politicians, business CEOs, teachers, MEPs, head teachers, civil servants, other change targets or influentials are busy people...

.... and even if they are not busy, the last thing they may want is to be contacted about your project and its ideas.

But for your project to be successful they may need to know:

So, how do projects go about contacting specific people when those people may not want to know?

Suggestions from previous projects include:
making initial contacts through secretaries, MP assistants and the local/provincial/regional party representatives,
or use 'influentials' to make the contact for you

The Hub participants came up with further creative ideas >>>

When they don't want to know / are too busy / etc?

○ What works in one cntry may not work in another

How to make contact?

— research your target: what is the situation for them
— use yr. networks (incl. smaller partners) └to dev. contacts
— focus on mutuality: think about what they need.
— broaden your coalition
— keep going
— time your contact (eg when they are new in the job)
— use diff't people to make contact (eg use pupils)
— peer pressure: eg mayor to mayor
—① use phone contact
② offer food + drink
③ photo opp" for the person you invite + press release
— use multiple CSOs — for joint contact
— give them publicity
— use multiple approaches at the same time
— use the hierarchy in yr. org^n to make first contact
— formulate the message: so it gives obvious benefit to the one you are targeting: "this will help you"
— use language they understand

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**THE CHALLENGE:
Spreading the
word on DEAR
Why? How?**

THE OPPORTUNITIES

DEAR Projects are closer to the general public,

Are innovative, active and engaged,

use lively social media and websites

… in short, you're great.

And we now have a good set of communication material:

•DEAR Videos

•DEAR Poster

•Infographic

• a new DEAR Landing Page

See www.dearprogramme.eu to find out what is available

How to use these communication opportunities?

Hub participants considered and suggested how their project could share these new DEAR communication materials.

And what opportunities are there for the DEAR Support Team to promote projects better?

Communicating the DEAR Programme

- projects have their own comms. plan
- who are we targetting with D. Progr. messages?
- safeguarding funding: who are the dec. makers
  ↳ i.e. it's advocacy ≠ gen. communications
- → existing project contacts?
- common project action(s) in BRX
- D. Progr. support for project presence at the EDD
- migration projects | exploring joint event (eg in BRX)
  SDG projects | for each
                  to showcase
- add DEAR symbol to project pages
  ↳ with hyperlink.
- decide on date of new web portal
  launch — for all projects to disseminate
  on that day + for DEAR sector to do too
- each project: what are the 2 or 3
 success/results cases you'd want to communicate

- *Monitoring* is typically concerned with questions like
  * **What has happened?**

- *Evaluation* tends to focus on
  * **Is this important?**

- *Learning* tends to involve questions to do with
  * **Why did things go as they did?** and
  * **What does that mean for our future work?**

A previous Hub in Ljubljana (March 2017) allowed four different DEAR projects to share their different approaches to the Monitoring, Evaluation and Learning process.
A revision of these four examples and these four projects staff recommendations were summarised in the present workshop.
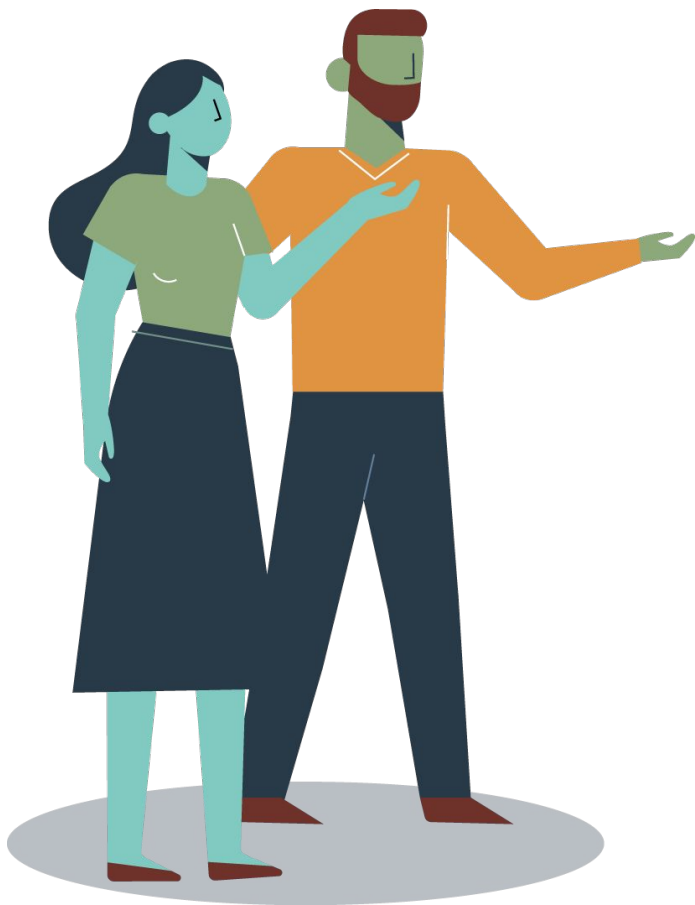
Ljubljana L&D Hub - MEL in Project A
(Global Learning curriculum development, 17 Partners, 10 Countries, LA-led)

- Developed a detailed *monitoring scheme based on the original log-frame*: identifying activities, participants, feedback, indications of success (RAG system)

- Regularly (quarterly and annually) *monitoring reports* from partners

- *Mid- and end-term qualitative and quantitative evaluations* based on monitoring reports, interviews, assessment & development events involving staff and/or participants, documentation reviews

- *Changes*: log-frame and monitoring scheme were regularly adapted to take account of evaluation findings, conclusions and recommendations

- *Role of evaluator*: setting up and adjusting the monitoring scheme, carrying out the evaluations (incl. assessment & development events)

Ljubljana L&D Hub – MEL in Project B
(Policy change through direct and supporter lobbying of decision makers, 15 Partners, EU & EU13 Countries, International network-led)

- Started with drawing out *learning from a previous (related) DEAR project*

- *Monitoring processes* included shared tools and formats (googledocs, financial reporting formats), quarterly reports from partners against indicators, regular face-to-face meetings of project staff

- Bi-monthly *updates* (centrally produced and drawing on monitoring evidence) kept all partners informed of progress in the project

- *Face-to-face meetings* reviewed and re-planned the project

- *Role of evaluator*: developing the monitoring tools and system, taking part in (some of) the face-to-face meetings, reporting on findings, adjusting the monitoring tools

Ljubljana L&D Hub - MEL in Project C
(Business practice change through consumer pressure, 27 Partners, 19 Countries, CSO-led)

- Initial log-frame formed starting point for design of *suite of **online tools*** (Dropbox, use of an on-line 'living log-frame', etc.): tracking events and harvesting results (both qualitative and quantitative)

- Monitoring gave information relevant to *the whole **impact chain*** (from intentions, to activities, to outputs, to outcomes, to impact)

- *Mid-term and end-term **evaluations*** analysed info gathered and, with staff and other stakeholders, drew out main learning points

- *Role of **evaluator***: design of system, support for all partners in implementing the system, observations of events and meetings, carrying out evaluations and helping partners to learn

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Ljubljana L&D Hub - MEL in Project D
(Policy change through public campaigning and direct lobbying of decision makers, 22 Partners, 16 Countries, CSO-led)

- Use of a standardised planning, monitoring and reporting system (www.basecamp.com) included *project 'working groups'*, each focussed on a particular theme/issue/aspect, and *targets for individual project partners*

- *Quarterly monitoring reports* (incl. on finance) from each partner and from each working group

- Use of *ROM* feedback

- Mid-term and end-term *evaluations*

- *Role of evaluator(s)*: one internal (project staff member) to develop regular monitoring reports + one external evaluator to carry out mid-term and end-term evaluations

7 recommendations from Ljubljana L&D Hub

1. *Learn* from previous projects: what can they recommend to you?

2. **Use an** *external evaluator/critical friend* to help in setting-up the M&E system, to analyse findings and help you to learn

3. "Not everything that can be counted counts, and not everything that counts can be counted":
   - *Be aware of what you cannot measure* (and what therefore needs to be obtained by other means),
   - For each thing you measure *be sure you know why* you measure it

4. *Fully integrate* the M&E approach and activities in your project implementation plan
   - In the project timetable, allocate *explicit time* for (i) Monitoring, (ii) Evaluation & (iii) Learning

5. Give as much **attention to the** *quality* as to the quantity **of activities** and outputs

6. Keep the system *as* **simple** *as possible*

Group work discussion highlighted what DEAR project managers consider the most important issues around MEL for DEAR

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- Consider/assess partner capacity since development stage (provide training where necessary)

- Involve partners in the setting up of M&E system (kick of/face-to-face meeting) + make online training available on the use of tools and documents

- Be clear on terminology: what you mean for each tool and concept. Do not expect everyone to mean the same when they use the same concept

- Involve the external evaluator from the beginning (even if you only plan to have an end of project evaluation)

- Be flexible about timing of monitoring report and focus on important things

- After year 1 review your M&E system > and have a mid-term evaluation

- Accept that not everyone can be involved in evaluation (difficult when you have 56 partners and thousands of activists
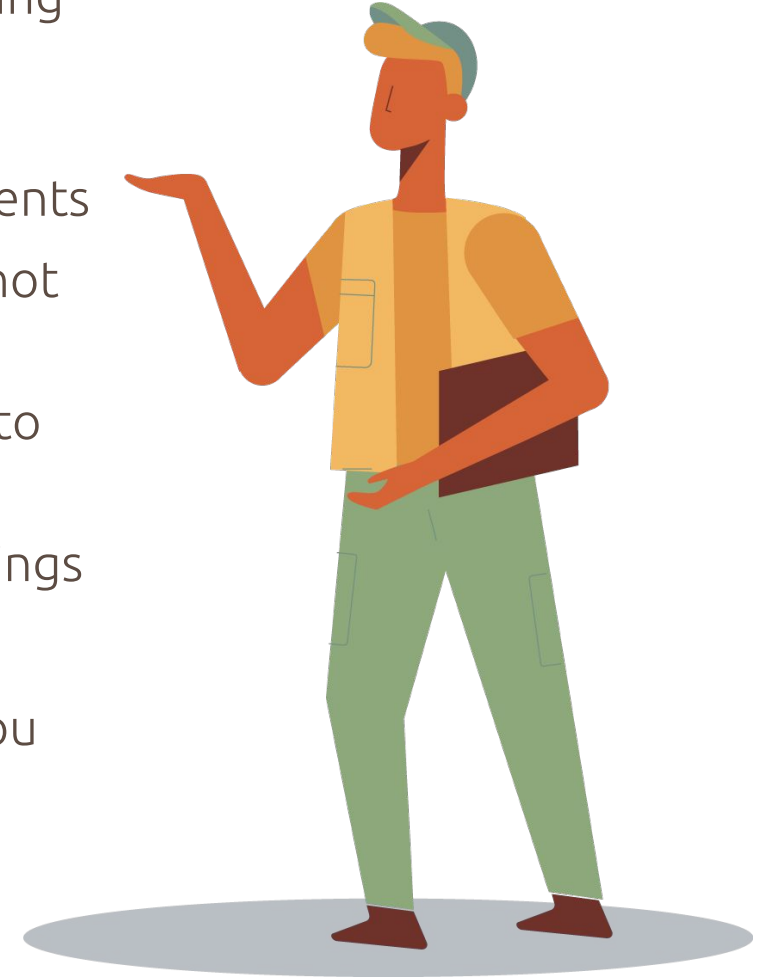
Feedback about the Hub from participants

Scores out of 10 maximum
- Meeting the participants' expectations: 8.3
- Achievement of the Hub objectives: 8.5
- Relevance of the programme to participants' work: 8.3
- Appropriateness of methodologies used: 8.3
- Quality of facilitation by DEAR ST staff: 9.4
- The value of EC staff participation: 9.3
- Logistics support provided by DST: 9.7
- The overall success of the Hub: 8.7

Suggestions for future events and topics:
_Recurring comment: compulsory presence of Task managers and one-on-one consultations
_Preparation for Final Report and 'how to wrap up a project?'
_Funding: other sources for DEAR beyond DEAR/DEVCO?
_Financial management, sustainability and funds reallocation
_Smaller groups discussions, group puzzles
_Sessions/workshops per thematics of projects

Reports on previous Exchange Hubs that are particularly relevant to this Hub

● 'Developing Sustained, Lasting Impact through DEAR projects' - Cluster Meetings (2011-12 CfP): Brussels, 18th&21st April 2015 - at https://bit.ly/2qWxnLH

● 'Working in and with local communities' - Exchange Hub, EC Representation Milan, 7th & 8th June 2016: at https://bit.ly/2qYR19J

● 'Working in and with large partnerships' - Exchange Hub, Palazzo Reale, Milan, 9th & 10th June 2016: at https://bit.ly/2DrsnRJ

● 'Approaches that meet the EC's DEAR Objectives' - Exchange Hub (2013 CfP), Brussels, 23rd & 24th March 2017: https://europa.eu/capacity4dev/dear/node/55523

● 'Developing Communication Plans for work with external audiences' - Exchange Hub (2016 CfP), Brussels, 14th & 15th Sept 2018: https://europa.eu/capacity4dev/dear/node/83610

● 'Suggestions for completing Narrative Reports' - Exchange Hub (2016 CfP), Brussels, 13th February 2019: https://europa.eu/capacity4dev/dear/node/90648

And 'Using evaluation during DEAR projects implementation' - Learning Hub , Ljubljana, 6th and 7th March 2017: https://bit.ly/384Ldwp

Thank you for participating - and reading this summary,

The DEAR Support TEAM