IS2 Planning & Managing DEAR Projects

Presentations and ideas at the Inception Seminar for new projects, 15th September 2020

DEAR
DEVELOPMENT EDUCATION AND AWARENESS RAISING

Purpose and slide content

- The seminar is one of a series of online events providing na insight into experiences of past and current DEAR projects, and an opportunity for project representatives to exchange and discuss relevant issues.

- Content:
  - Slide 3: Suggestions from previous projects
  - Slide 4: Experiences of the 'Coherent Europe for Sustainable Development' project
  - Slide 15: Experiences of the 'No PLANetB!' sub-granting project
  - Slide 24: Sub-granting, Managing (large) partnerships, and Planning the Plan: participant suggestions noted on Padlet
  - Slide 28: Confidence/Support
  - Slide 29: Further resources

Planning and Managing a DEAR project: suggestions from 85 previous projects

At the start of your project:

1. Plan time for planning and reviewing *"If you have a 3 year project, then only plan for 2 years actual work …"*

2. Assume that your proposal is out-of-date *"Things will have changed since the proposal was written"* (and not only because of COVID-19)

3. What do your project partners hope to gain from the project? *"… be aware of each others' expectations"*

4. What change do you want: from whom, why? *"It's the results that matter, not the activities"*

5. *Which project management approach will you use?* – centrally managed?, coordinated?, dispersed? Is every partner aware of their responsibility and of their ability to make independent decisions (if any)?
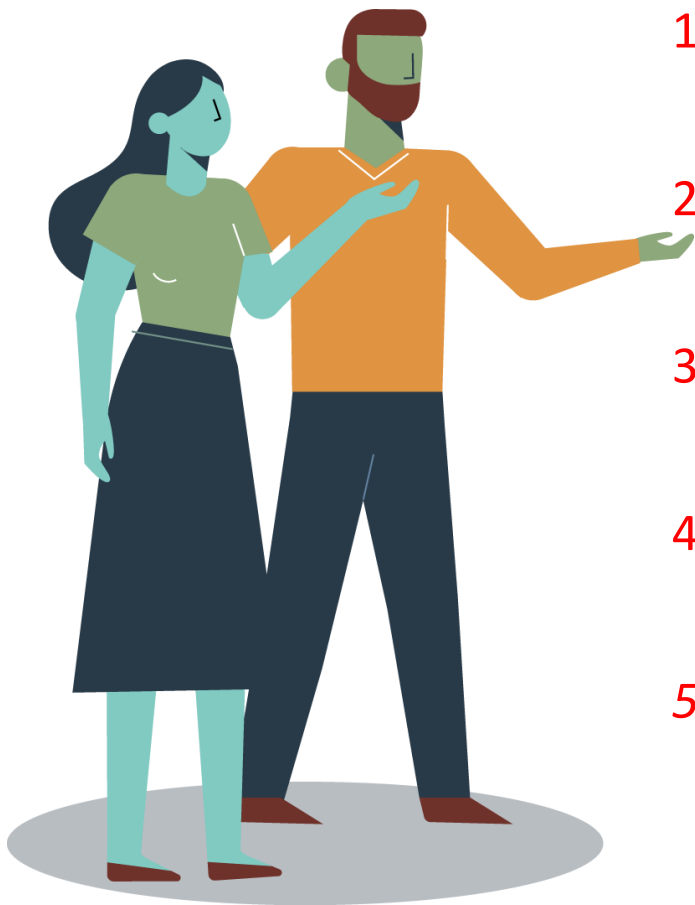
Presentation from **Robert Ach-Hübner,** Project Manager of the **'Coherent Europe for Sustainable Development'** project

https://www.nazemi.cz/en/coherent-europe-sustainable-development

Planning & Coordinating: pitfalls and solutions

Robert Ach-Hübner

Pitfalls

Situation can change anytime

Project consortium is not an organization

Solutions

Be flexible in the management

Keep it simple

Task	Deadline	Notes
Make sure you will have arranged someone to do reporting after the end of the project		Instructions in the "Tasks" section
Use the evaluation tools	all the time	Instructions in the "Tasks" section
Store and back up (to be able to deliver should the audit occur 2-3 years after the project) - bookeeping - travel documents (BPs etc.) - HR documents (contracts specifying the project, payrolls etc.) - produced materials (fullfiling the visibility rule including acknowledgement of EC funding on your website) - other evidence for all the indicators values (attendance lists, photos, email communications with PMs etc.):	all the time	Instructions in the "Tasks" section
Focus on the indicators that we need to improve	all the time	Instructions in the "Are we on track t

Don't expect too much from common work

Reflection on suggestions from other projects

- Plan **time for planning** (only 2 years of work)
- Assume that your **proposal is out-of-date**
- **What do your project partners hope to gain** from the project?
- What change do you want, from who and why? (the **result matters, not the activities**)
- Which **project management approach** will you use?

What are the issues and good ideas in different aspects of planning and managing?

To do with sub-granting/third party financial support:

Introduction from **Monica Favot**, Project Manager of the **'There isn't a PLANet B!'** project

https://www.noplanetb.net/#intro

A ONE AND ONLY PLANET FOR EVERYBODY

From ideas to workable implementation
SUB-GRANTS

NOPLANETB:

A DEAR-funded action with financial support to third parties _as main aim_

Funding (& support) for

actions of information, awareness raising, communication (etc.) promoting sustainable lifestyles and fighting against climate change (key focus on SDGs 11, 12, 13)

Funding to

Small and medium CSOs, selected through calls for ideas (+ 1 direct award) in the 6 partner countries

In a nutshell:

114 sub-grants funded:
- big grants: 12-18 m., 51.000 € average
_small grants: 6-12 m., 8.600 € average

In total, 3,1 M€ sub-granted
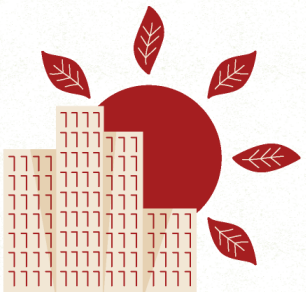
NOPLANETB

WE HAVE LEARNT A LOT

It has been exciting

- Small & medium CSOs are deeply rooted in society & are prone to innovation
- Sub-grants achievements are fully in line with NOPLANETB objectives (win-win strategies & SDGs)
- CSOs could access to EU funding (otherwise not easily accessible) & open up to new partnerships
- The rules of the game were defined considering the peculiarities of CSOs in the partner countries

It has been challenging

- 'Mixed' (new) role for NOPLANETB partners: donors for sub-grants **and** beneficiaries for the EC
- Continuous support was necessary to accompany the management of the sub-grants, to ensure full compliance with the rules
- The rules of the game had to be fully compliant with the EC rules
- There are no specific EC rules / templates for sub-grants (many grey areas)

A GOOD START IS HALF THE BATTLE

Sub-grants may (actually) greatly contribute to the overall project objectives

Keep everything simple, but fully transparent!

→ *Calls for ideas & calls for innovation widely promoted*
→ *Information sessions, tutorials & Q&A (via email)*
→ *(full) application packages*
→ *(ad hoc) monitoring tools*
→ *Continuous 'helpdesk' & monitoring visits*

NOPLANETB

- The selection processes are key
- The sub-grants expected objectives must be clear (and processes must be in place to monitor them)
- The support to the sub-grantees makes the difference

TOOLS & APPLICABLE PROCEDURES

→ *Simplified (and simple) application & reporting but comprehensive templates*
→ *More restrictive eligibility cost criteria*
→ *Training sessions & continuous support to subgrantees in their contract management*
→ *Preparation & sharing of checklist, guidelines, examples etc.*

In line of principle, the EC rules applicable to the overall project are applicable to the sub-grants too (check eventual exceptions in the GC & grant contract)

'Translate' the EC rules for sub-grants is key, to make sure the EC principles are fully complied with. Ad hoc (simplified) tools greatly help!
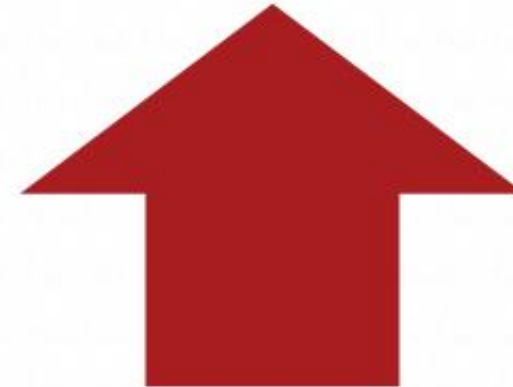
MANAGING THE UNEXPECTED

Planning is key, but we cannot foresee everything!

In case the project proposal does not detail everything, outline all the missing elements to make sure sub-grants contribute to the project objectives

Enough & skilled human resources must be allocated to the sub-grant component (starting from the beginning)

A preventive approach is to be preferred, through monitoring & reporting (appropriate tools are recommended)

An open channel of communication with the EC helps (to ask for guidance in case of grey areas, to keep informed etc.)

→ 'Innovative' selection process
→ EC rules 'translated' & simplified
→ Training sessions upon inception with sub-grantees + continuous support afterwords
→ Staff with sound & solid experience with EC management rules (not enough staff, though!)
→ Open & fruitful channel of communication with the EC

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(OUR) GOLDEN RULES

...Just 3

Keep the focus on the objectives of the sub-grants **and** of the overall DEAR-funded project

Be flexible to adapt to the unexpected *(but not too much)*

Keep it simple *(even if it may not seem easy)*

Good ideas: feedback from participant discussions

Good Ideas

Sub-granting, Managing Partnerships, Planning

Sub-granting: good ideas

Clear objectives what subgrantees should be contributing.

Decide the approach to subgranting - what is centrally coordinated, what is the responsibility of each
partner, how is comm with EC managed as well as QA by partners

Keep it simple with the documents

Take your time, it is a long process

Close support by coordinators to subgrantees

Keep the Q&A of the applicants central so that all partners/countries have similar answers

Create an ad hoc monitoring tool

Takes more HR resource than estimated! Plan for it!

Prepare proper internal concept note for the partners with all the details and an external summarised guidelines for the applicants

Be careful about funding ongoing projects - they may not share your project goals

Keep in mind that if the subgrant comes from a LA there are more rules to follow

Present the subgrant as an opportunity to learn, especially for small-medium CSOs

This is particularly true for financial part (e.g. how to do a timesheet, provide all documentation for each expense, ...)

Prepare your evaluators/jurors well

Use good tech people to plan and do the applying, assessing, reporting, etc. simple, easy and transparent

if possible, keep everything online (documentation, guidelines, templates, reporting system etc.)

build a proper monitoring support system on subgrants

Managing (large) partnerships: good ideas

Manage Expectations of each partner

Clear project structure with various working groups & frequent meetings.

install working groups

Clear project handbook

Online reporting systems

Team building

Topic oriented working groups

Joint campaigning strategy

Good managment Team

Online inception meetings - useful to have an external facilitator included

Design the calls using local languages in order to reach small CSOs - may it ensure wider participation

Newsletter

Platforms for communication and sharing of ideas like Teams, Sharepoint

Setting up reporting system and M&E tools easy to use and ideally all in one

doing survey among partners about the goals, strategy etc. of the project

have a FAQ document online and update it regularly - so all partners can read that first before e-mailing to coordinator

Internal consortium newsletter: regular (on average every 3 weeks) digital newsletter to all project partners, with updates on project management, inspiration, sharing interesting resources/events, inviting for feedback, etc.

Planning: good ideas

Organisation Mapping

Drawing links between areas of shared responsibility and actions. Who coordinates with whom and when? helps to build areas of shared focus

Visual representation of the project (connections, partners, target, timing…)

Planning, monitoring and coordination helpful apps

Asana, Trello, Miro, Slack…

Use of smartsheets and or cognito forms for monitoring and reporting

be flexible

dont plan too much for the future

Creation of bespoke monitoring system

Develop an online tool for monitoring of projects, targets etc. System being tested and will update the group when tests complete (Oxfam, EU citizens)

Develop your own system for M&E

use synergies in order to reach the objectives

try not to reinvent the wheel

focus on meeting objectives of project

Flexibility

more important than ever due to COVID. Importance of plan Bs

What platform? System?

A number of tools discussed and found helpful, including: Zoom, Teams, Session Lab, Smart Sheets, Cognito Forms (Spelling?)

Trust, but verify

Agree there is need to trust project partners but there are also some rules that need to be applied…. especially on financial reporting and monitoring
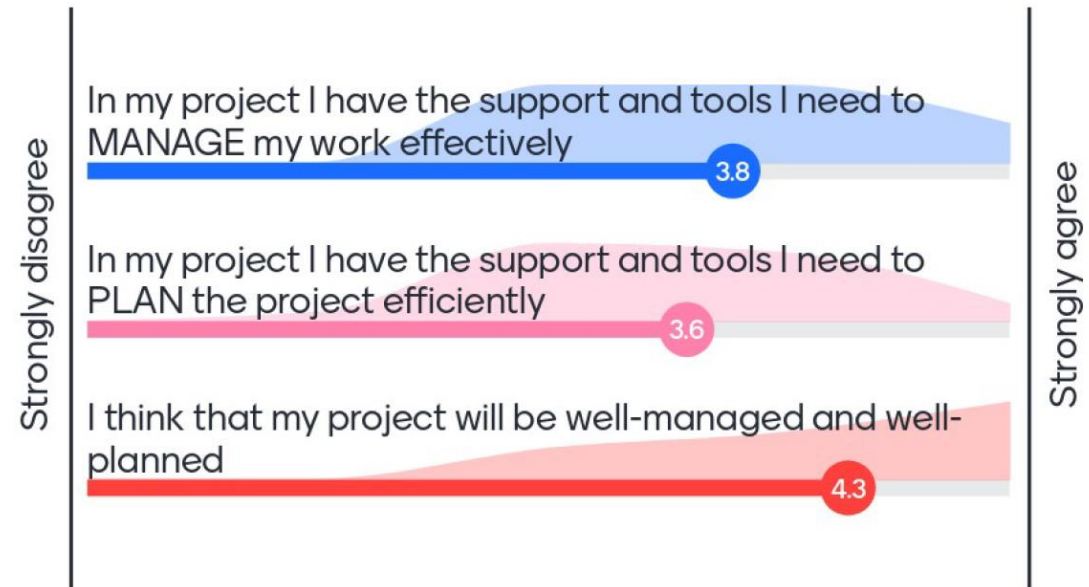
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Confidence?

More suggestions from previous projects

See:

- Sections 1 and 2 in 'Planning and Implementing EU DEAR Projects':

  https://europa.eu/capacity4dev/dear/node/64775

- 'Asking Questions about DEAR Projects':

  https://europa.eu/capacity4dev/dear/documents/asking-questions-about-dear-projects

Thank you for your contributions and we look forward to be working with you.

DEAR Support Team
www.capacity4dev.eu/dear