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 Live Webinars

Strengthening Project Proposal Development

Overview of Project Design and
Project Management

20 May 2024

**EASTERN PARTNERSHIP
CIVIL SOCIETY FACILITY
PROJECT**

#EaPCivilSociety



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Live Webinars

Strengthening Project Proposal Development

A series of webinars to guide CSOs in the Eastern Partnership on how to prepare proposals for EU funding



DATES

13, 15, 17 and 20 May 2024



TIME

13:00 - 14:00 CET (Brussels time)

- ✓ 13 May: Overview of Project Design and Project Management
- ✓ 15 May: People in Projects
- ✓ 17 May: Purpose and Objectives in Projects
- ✓ 20 May: Monitoring and Control in Projects

Trainer: Agustín Moya-Colorado

Senior Project Management Expert at
Helpdesk for EU grantees at EaP Civil Society Facility



REGISTER NOW

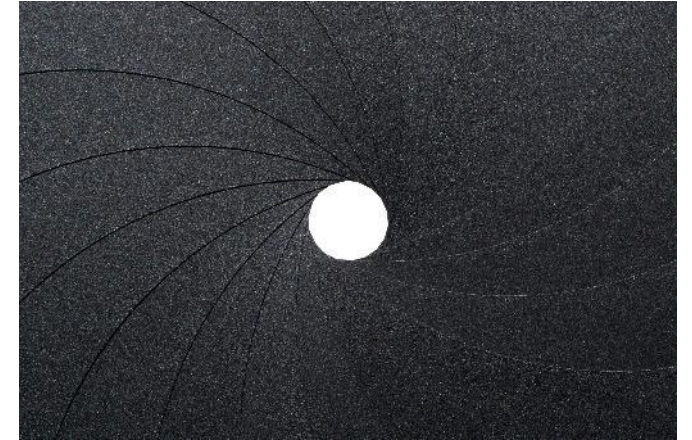
Agustín Moya Colorado

- Agricultural Engineer
- 25 years working experience in Project Management in the area of International Development Cooperation
- Working experience with NGO and with donor agencies (EC)
- Nicaragua, Guatemala, Namibia, Mozambique, Cyprus
- PM² certified
- Helpdesk for the EaP Civil Society facility:
 - grantees_helpdesk@eapcivilsociety.eu
- LinkedIn →



Proposed rules for the session

- Microphones and cameras:
 - Complete freedom
 - Suggested: closed microphone and open camera
- Questions:
 - Complete freedom: at any time or at the end of each section
 - Open discussion on any issue – raise your hand or use the chat



Day 4 – Monitoring and Control in Projects

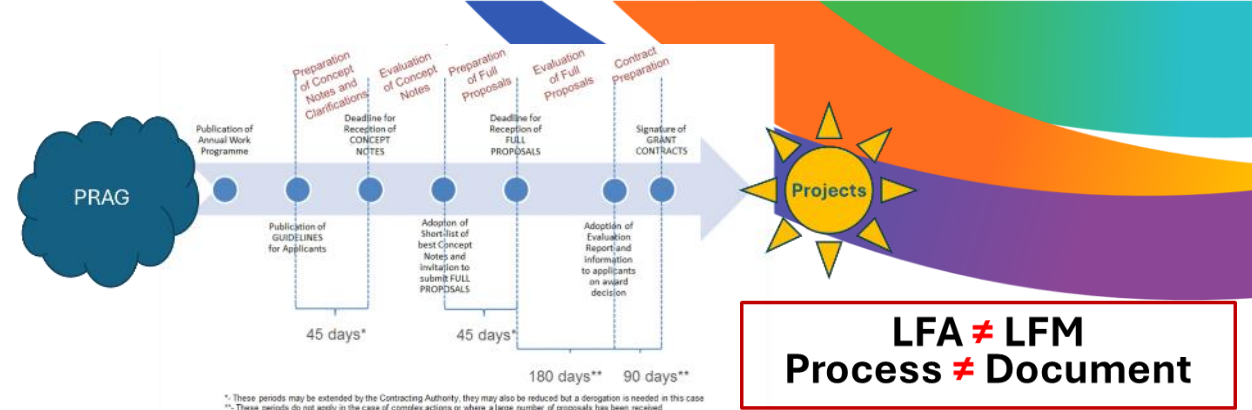
20 May 2024

- Recap from previous sessions
- Monitoring
- Questions and Answers

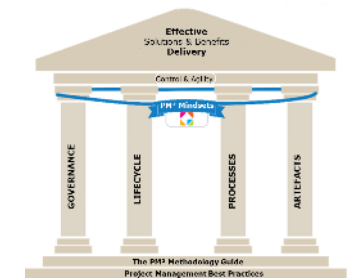
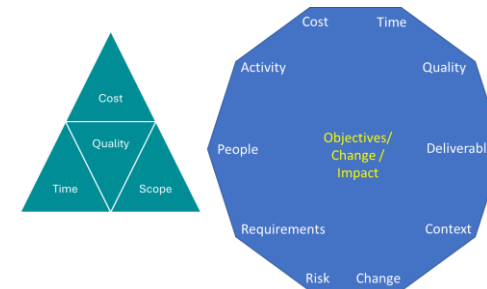
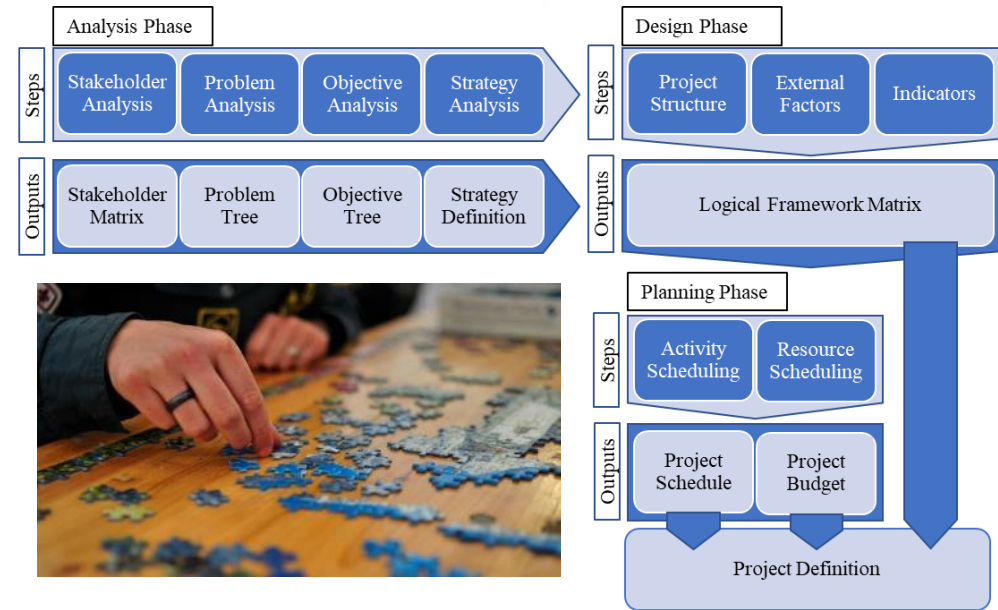


Recap D1

- EU-Funded projects are complex and competitive, generally organized in **two steps: CN and FA**
- **Project Design** is fundamental, and it is supported by the **LFA**, which is different from the LFM; and it is **assessed at CN stage** together with **Relevance**.
- Make sure you cover all steps in the **Analysis** to answer all the questions in the evaluation grids.
- **At FA stage** you will complete the **planning** of your project
- **Project Management** is supported by Project Management Methodologies, such as **PM²**, that allow you to integrate all the necessary dimensions in your project.



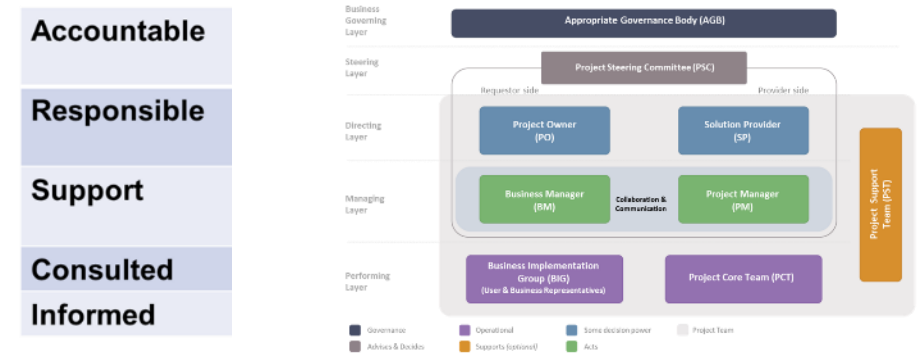
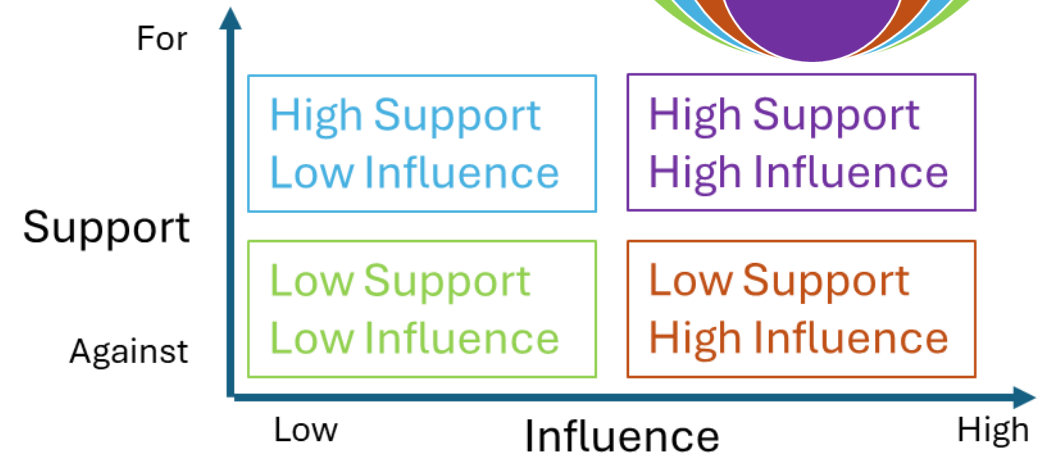
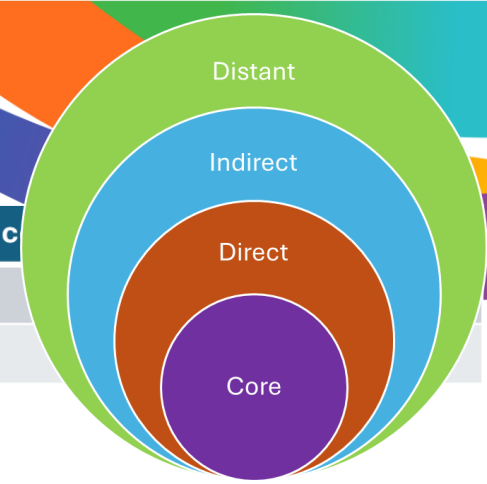
**LFA ≠ LFM
Process ≠ Document**



Recap D2

- People are core elements in Projects – keep a **people-oriented mindset**
- The more you know about the people in your Project, more elements of **success** in your favour
- Conduct **Stakeholder Analysis** at the very beginning and regularly update it with the tools at your disposal
- Establish a clear **Governance Model** for your project, assigning Roles and Responsibilities

Stakeholder	Characteristics	Needs	Capacities	Support	Influence



Wrap-up D3

- The **LFA** is a **process** that is comprised of:
 - Stakeholder Analysis
 - Problem Analysis
 - Objective and Strategy Analysis
- Provides a solid **Intervention Logic**
- That leads to a strong **Logframe Matrix**
- That allows for firm **planning** in terms of time and budget
- Providing the foundation of a winner **Full Application**

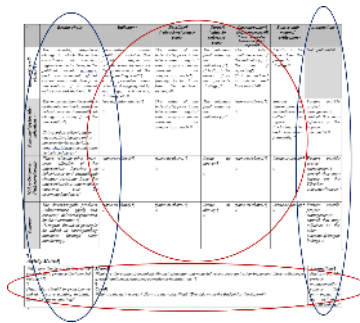
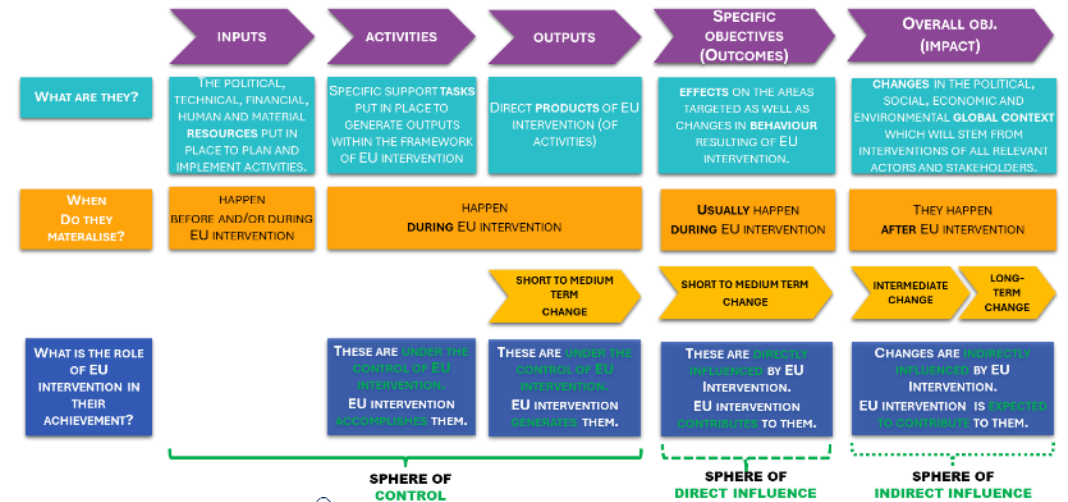
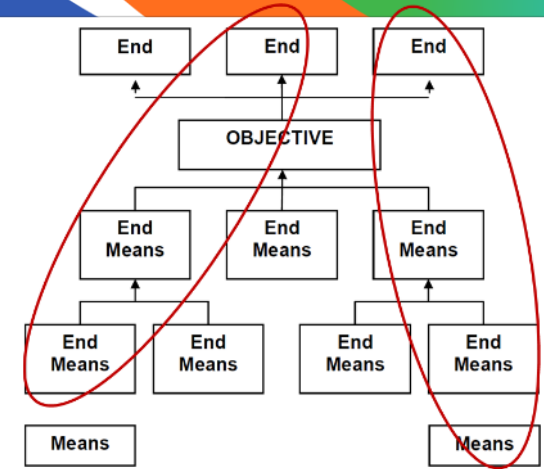
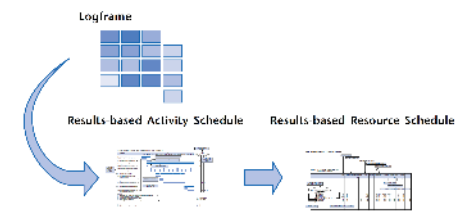


Figure 35 – Link between logframe, activity and resource schedules



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**Please type words that you associate
with "monitoring"**

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Monitoring definition

“Monitoring is:

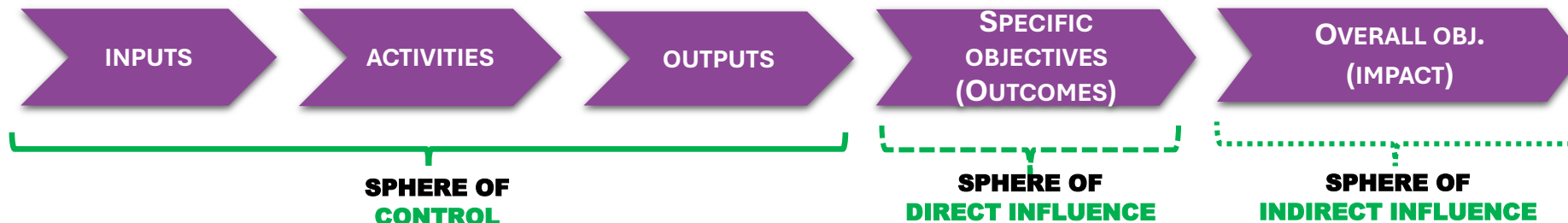
- *a **continuing** function that uses*
 - ***systematic** collection of **data** on specified **indicators***
 - *to provide **management** and the main **stakeholders** of an on-going intervention with*
 - *indications of the extent of **progress** and **achievement** of objectives and*
 - ***progress** in the **use** of allocated funds”*
- (OECD-DAC definition).



Why monitoring?

Monitoring is a **management** tool.

- Monitoring provides regular and systemic **information any given time** (and over time) relative to respective targets and outcomes (by their **indicators**):
 - **Where** are we?
 - Are we on **track**?
 - Do we have **problems**?
 - Are we exposed to **risks**?
 - Do we need to take **corrective measures**?



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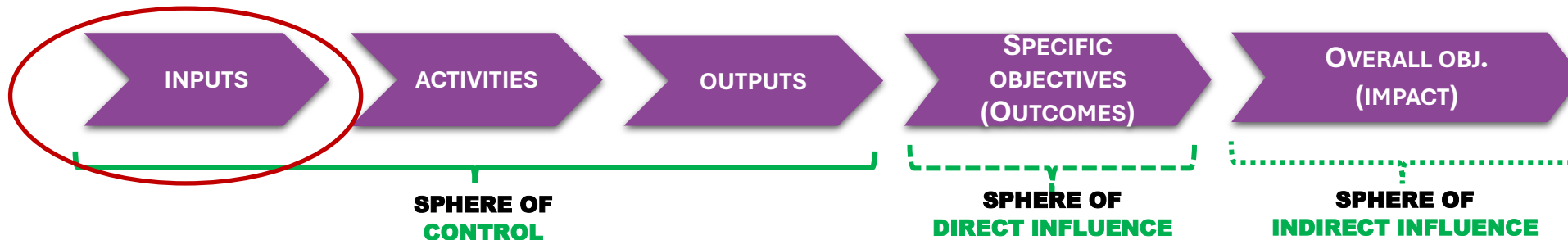
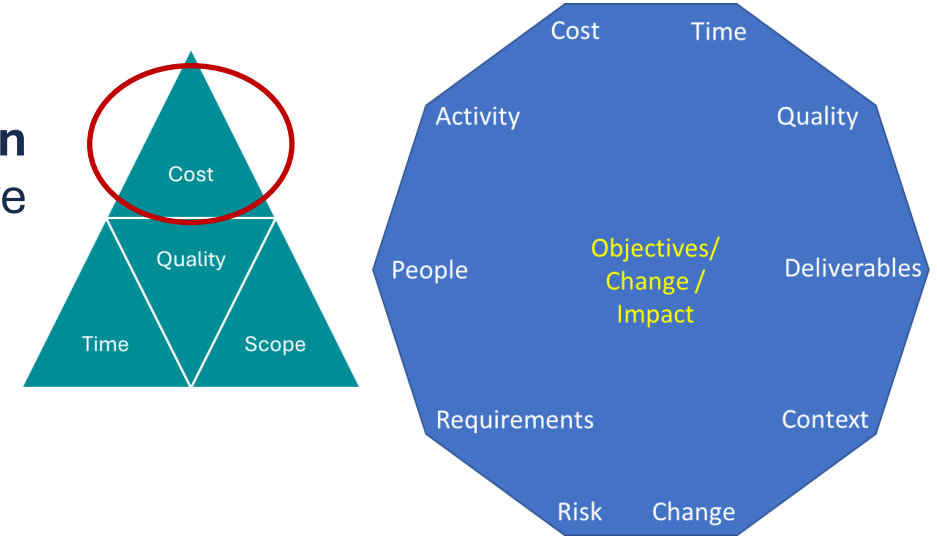
In your organization, how often do you check, revise, and/or update your accounts / project budget?

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Monitoring expenditure / Budget implementation

Monitoring is a **management** tool.

- Monitoring provides regular and systemic **information any given time** (and over time) relative to respective targets and outcomes (by their **indicators**):
 - Where** are we? – How much have we spent so far?
 - Are we on **track**? – Have we over-spent?
 - Do we have **problems**? – Do we have enough funds?
 - Are we exposed to **risks**? – How is inflation doing?
 - Do we need to take **corrective measures**?



Outputs are tangible and visible, but are not the most important part of the project

Projects are not about **doing things**, but about generating **change**

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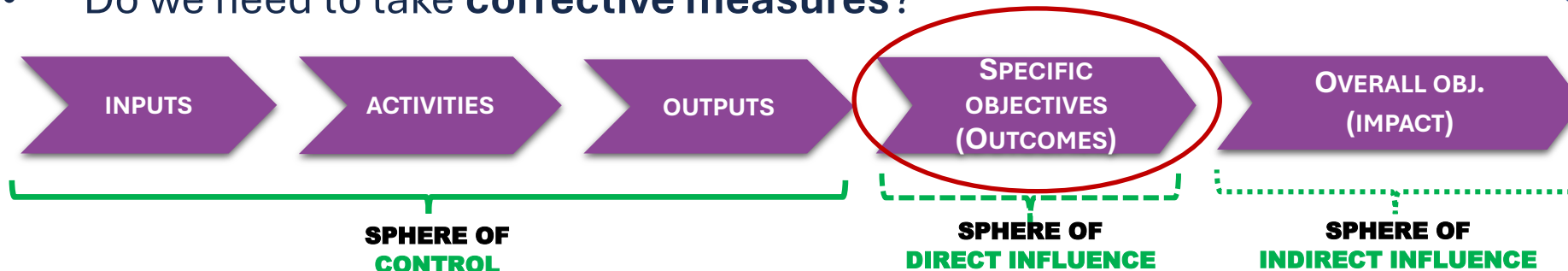
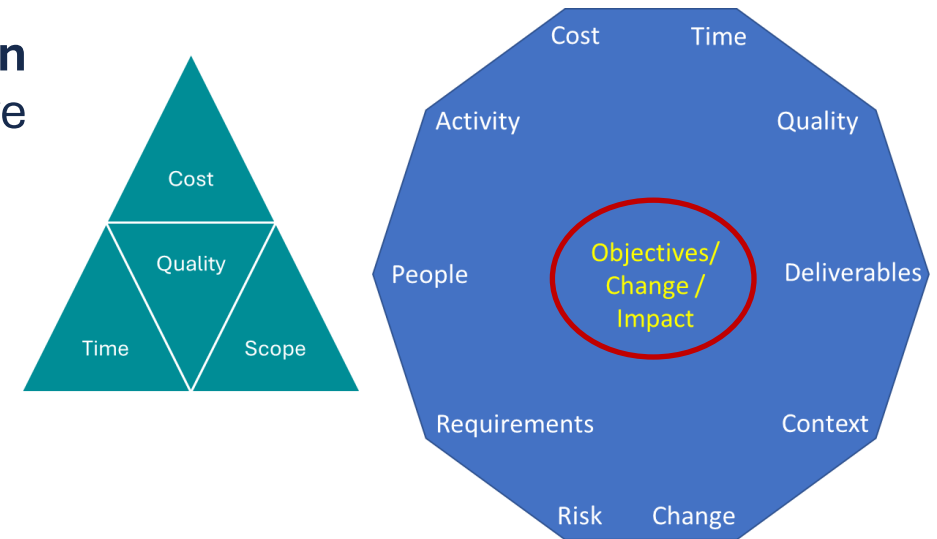
In your organization, how often do you check, revise, and/or update if you are on track to project success?

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Monitoring Results / Outcomes

Monitoring is a **management** tool.

- Monitoring provides regular and systemic **information any given time** (and over time) relative to respective targets and outcomes (by their **indicators**):
 - Where** are we? – Have we **changed** anything yet?
 - Are we on **track**? – Will we **change** anything?
 - Do we have **problems**?
 - Are we exposed to **risks**?
 - Do we need to take **corrective measures**?



Indicators

“An indicator is:

- *a **quantitative or qualitative** factor or variable*
 - *that provides a **simple and reliable means***
 - *to **measure** achievement,*
 - *to reflect the **changes** connected to an intervention,*
 - *or to help **assess** the performance of an actor”*
- (OECD-DAC definition).



Why defining indicators?

- During **planning**: a way to **improve** the intervention logic's **design**
 - Once the different levels of the intervention logic are defined indicators for each of them are to be identified.
 - They allow further clarifying, detail and focusing the intervention logic
 - Define concrete targets in terms of values, timing and goals
- During **monitoring**: a way to **steer** intervention's implementation (**management**)
 - To steer project implementation and take corrective measures
 - Inform stakeholders
- During **evaluation**: a way to **demonstrate** results (**accountability**)
 - Donors
 - Target groups
 - Stakeholders



Monitoring data (Indicators):

	Principle	Definition
S	Specific	<ul style="list-style-type: none">• Target a specific area for improvement
M	Measurable	<ul style="list-style-type: none">• Quantify or at least suggest an indicator of progress
A	Attainable /Achievable	<ul style="list-style-type: none">• Make sure that it can be reached
R	Realistic	<ul style="list-style-type: none">• State what results can realistically be achieved, given available resources
T	Time-bound	<ul style="list-style-type: none">• Specify when the result(s) can be achieved



Monitoring data (Indicators):

	Principle	Definition
R	Relevant	<ul style="list-style-type: none">• Closely linked to the objectives to be reached.• They should not be overambitious and should measure the right thing
A	Accepted	<ul style="list-style-type: none">• The role and responsibilities for the indicator need to be well defined
C	Credible	<ul style="list-style-type: none">• Unambiguous and easy to interpret.• Data sources should be trustworthy and consistent
E	Easy	<ul style="list-style-type: none">• Data collection should be possible at low cost and effort• Built, as far as practicable, on available underlying data
R	Robust	<ul style="list-style-type: none">• Against manipulation, straightforward• Reliable, statistically and analytically validated



Understanding and applying the RACER criteria can greatly enhance the **quality and competitiveness** of a proposal for EU funding, helping to clarify its objectives and potential impacts, and making a strong case for its feasibility and relevance.

Indicators components

- **Title:** Name of the indicator
- **Definition:** Describes the unit of measure and how the value is calculated
- **Baseline:** the reference value at the start of the intervention (or the latest available) against which progress will be assessed
- **Milestone :** the path towards the final target.
- **Final target:** Signals how much change is expected and in what direction
- **Source of verification:** Where the data will come from



Indicators guidance

- Indicators may need to be **disaggregated**
 - Gender,
 - Age,
 - Territorial level to which it refers
 - Income quintiles/deciles, etc.
- It is important to think about:
 - Disaggregation **cost** (resources available),
 - Data **quality**
 - Data collection **methods**, etc.
- Indicators must be expressed in **neutral terms**: they signal a change, not the direction of the change.
 - The objective may be to decrease the number of gender based violence cases,
 - The indicator might be 'Number of gender-based violence cases reported', and not 'Decreased number of gender-based violence cases reported'.

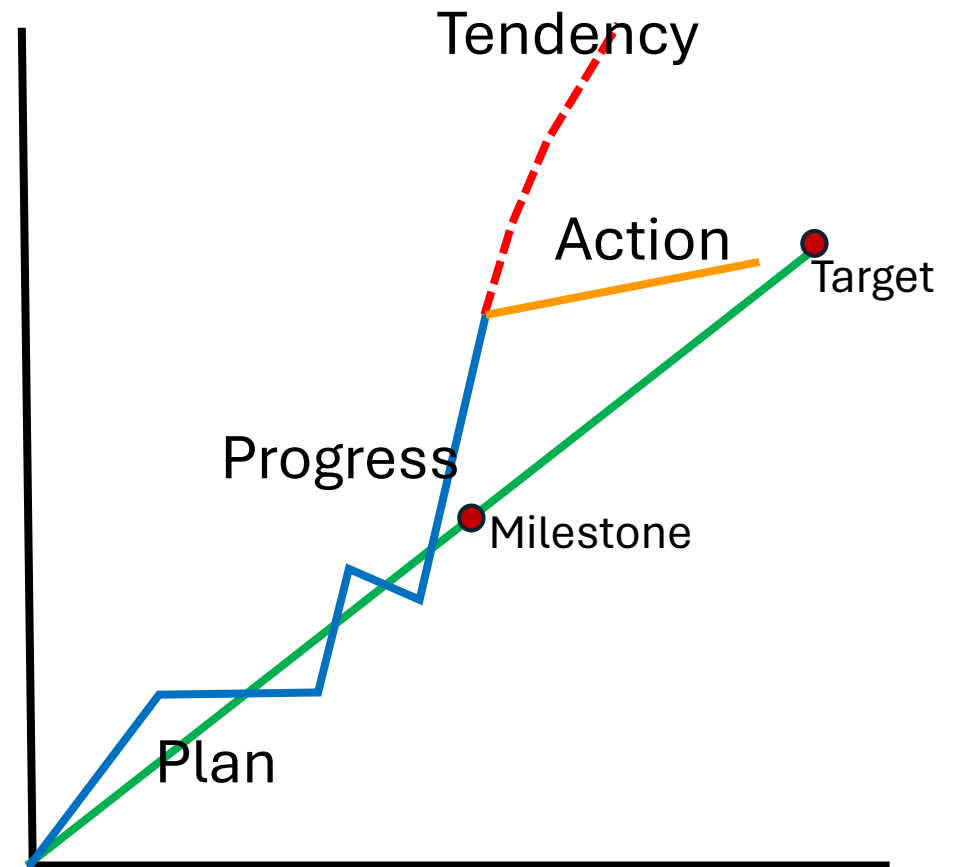


Indicators components - example

Indicator title	Definition	Baseline		Milestone		Target		Sources of information
		Value	Year	Value	Year	Value	Year	
% of women in senior positions of trade unions	This indicator is the percentage of women in senior management positions (public sector; at least head of unit post)	15%	2010	20%	2015	25%	2020	Department of Statistics of the given country

Baselines

- The first version of plans, the still image from the **starting point** (green line)
- But the progress implementation of the project never follows the green line, it looks more like the **blue line**.
- We need to **regularly check** the progress and compare it to the initial plan (or its updates) and:
 - Assess/forecast the **trend**
 - Take **corrective action** when necessary
 - As **often** as necessary



Sources of indicators – EC Database – Capacity4dev

Filters

Sector
Select a sector +

Corporate
- Any - v

Context
Select a context +

Gender Sensitive
- Any - v

DAC sector(s)
Select a DAC sector(s) +

Result Level(s)
Select a Result level(s) +

[Apply](#) [Clear](#)

Results (2753) [Download](#)

Indicator Name	Indicator Description	Gender Sensitive	Type	Value	Un Me
Prevalence of wasting among children under 5 years of age by sex (SDG indicator 2.2.2)	Wasting is defined as: weight for height	No	Quantitative	Percentage	
Volume of ODA funding towards Nutrition (by donor and by recipient country) (OPSYS core indicator)					Cu
Status of a budgeted national multi-sector plan/strategy for nutrition Xavier	Score for this indicator will have to be based on an expert assessment (by Unit C1), and there need to be clear assessment criteria (agreed with partner countries) "€" for example as part of the update of Nutrition country fiches	No	Qualitative	Qualitative	
Value or quantity of smallholders sales by		No	Quantitative	Numeric	Cu

1 2 3 ... 138 »



Methods for collecting monitoring data¹

Ask, ask, ask

- Surveys and Questionnaires
 - Google forms
 - SurveyMonkey
- Interviews
- Focus Groups
- Observations
- Document and Record Review
- Digital Monitoring Tools
 - KoboToolbox
 - Open Data Kit (ODK)



At FA

At FP you will need to complete the process and respond to the questions in the FA Grid

	Results-chain [□]	Indicator [□]	Baseline [¶] (value-&-reference-year) [□]	Target [¶] (value-&-reference-year) [□]	Current-value [¶] (reference-year) [¶] (*to-be-included-in-interim-and-final-reports) [□]	Source-and-mean-of-verification [□]	Assumptions [□]
Impact (Overall-objective) [□]	The broader, long-term change to which the action contributes at country, regional or sector level, in the political, social, economic and environmental global context which will stem from interventions of all relevant actors and stakeholders. [□]	Quantitative and/or qualitative variable that provides a simple and reliable mean to measure the achievement of the corresponding result. [¶] To be presented when relevant, disaggregated by sex, age, urban/rural, disability, etc. [□]	The value of the indicator(s) prior to the intervention against which progress can be assessed or comparisons made. [¶] (Ideally, to be drawn from the partner's strategy) [□]	The intended final value of the indicator(s). [¶] (Ideally, to be drawn from the partner's strategy) [□]	The latest available value of the indicator(s) at the time of reporting [¶] (* to be updated in interim and final reports) [□]	Ideally to be drawn from the partner's strategy. [□]	Not applicable [□]
Outcome(s) (Specific-objective(s)) [□]	The main medium-term effect of the intervention focusing on behavioural and institutional changes resulting from the intervention [¶] (It is good practice to have one specific objective only, however for large Actions, other short term outcomes can be included here) [□]	(see definition above) [¶] [□]	The value of the indicator(s) prior to the intervention against which progress can be assessed or comparisons made. [□]	The intended final value of the indicator(s). [□]	(same as above) [¶] [□]	Sources of information and methods used to collect and report (including who and when/how frequently). [□]	Factors outside project management's control that may influence on the impact-outcome(s). [□]
*Other-Outcomes (*where relevant) [□]	Where relevant other short-term effect(s) of the intervention focusing on behavioural and institutional changes resulting from the intervention (e.g. intermediate-outcomes can be accommodated here) [□]	(same as above) [¶] [□]	(same as above) [¶] [□]	(same as above) [¶] [□]	(same as above) [¶] [□]	(same as above) [¶] [□]	Factors outside project management's control that may impact on the SO/other-outcomes linkage. [□]
Outputs [□]	The direct/tangible products (infrastructure, goods and services) delivered/generated by the intervention [¶] (*Outputs should in principle be linked to corresponding outcomes through clear numbering) [□]	(same as above) [¶] [□]	(same as above) [¶] [□]	(same as above) [¶] [□]	(same as above) [¶] [□]	(same as above) [¶] [□]	Factors outside project management's control that may influence on the other outcome(s)/output linkage. [□]

Activity Matrix[¶]

What are the key activities to be carried out to produce the intended outputs? [¶] (*activities should in principle be linked to corresponding output(s) through clear numbering) [□]	Means[¶] What are the political, technical, financial, human and material resources required to implement these activities, e.g. staff, equipment, supplies, operational facilities, etc. [¶]	Assumptions[¶] Factors outside project management's control that may impact on the activities/outputs linkage. [□]
	Costs[¶] What are the action costs? How are they classified? (Breakdown in the Budget for the Action) [□]	

Monitoring Plan

Directly linked to the **intervention logic**.

- What data do we need? - **Indicators**
- When does data need to be collected? – **Frequency**
- How does data need to be collected? - **Methods**
- Who will collect the data? – **Project Team**
- From whom? – **Target Groups, Stakeholders**
- **Proportionate:** Balance the effort and the use
- **Comprehensive:** Cover all project spheres
- **Timely:** Set it up as soon as possible - in the design

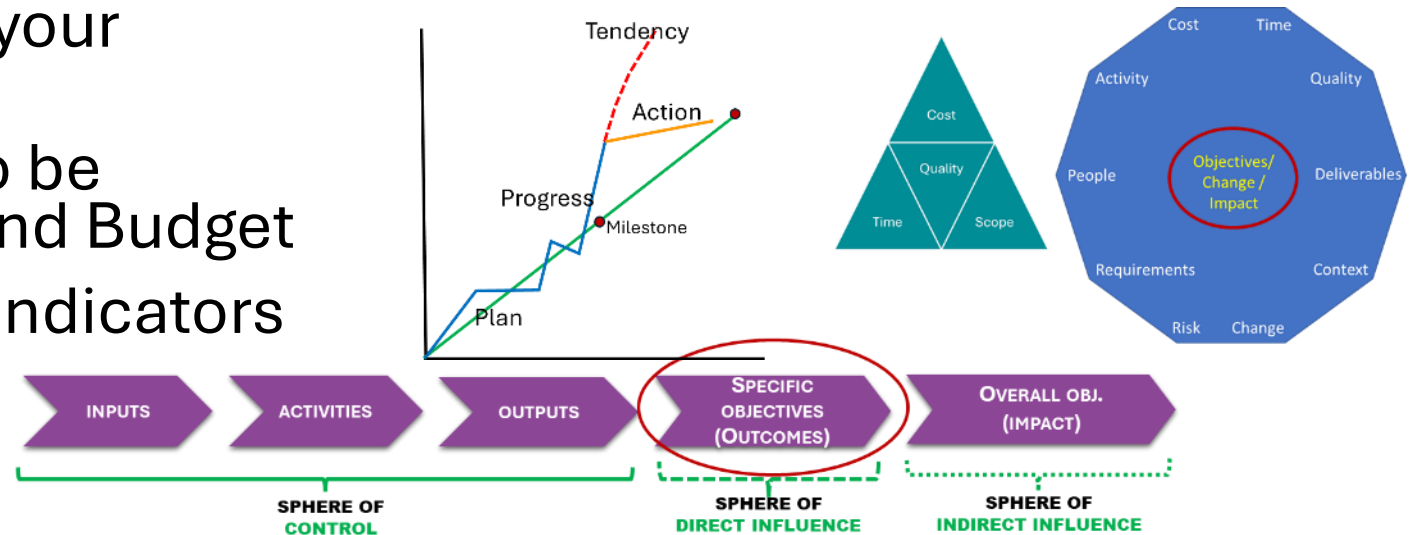


Integrated in the **Work Plan** and in the **Budget**

Wrap-up

- Monitoring is an essential management function
- It needs to be adequately planned to cover also Outcomes and Impact
- Indicators, baselines, milestones and targets are to be included in your Monitoring Plan
- Activities and Methods are to be included in your Work Plan and Budget
- There are official sources of indicators available

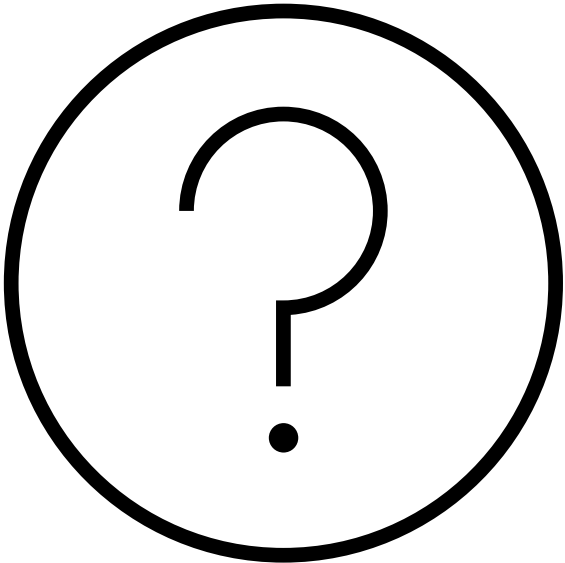
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Thank you very much for your kind attention

Questions and answers



grantees_helpdesk@eapcivilsociety.eu

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i Start presenting to display the poll results on this slide.