



Methodological Guide

Design and Manage a Project



CITATION

AND GUIDE DRAFTING



HOW TO CITE THE WORK

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GUIDE DRAFTING

This methodological guide was developed in coordination with the European and International Department of the Conservatoire du littoral, French Coastal Protection Agency (Céline Damery and Fabrice Bernard), with the support of the association “Initiatives Europe Conseil” in partnership with the Association “Initiative pour les Petites Iles de Méditerranée” (PIM initiative for Small Mediterranean Islands) and the Association SMILO (Small Island Organisation).

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PUBLISHING AUTHORITY

THE CONSERVATOIRE DU LITTORAL, FRENCH COASTAL PROTECTION AGENCY

Mindful of the ecological, social, economic and cultural significance of its coastline, France has chosen to preserve a significant proportion of natural coastal areas and to make them accessible to all. In 1975, the state decided to set up the *Conservatoire du littoral*, a public body supervised by the Ministry for Ecology, pursuing a land policy aimed at the definitive protection of natural areas and landscapes on maritime and lake shores. The organization can operate in the coastal districts in mainland and overseas France, as well as in the riverside communities of estuaries and deltas and lakes of more than 1 000 hectares. Its objectives: the preservation of natural environments and remarkable and endangered landscapes, public access and reception while respecting the sites in order to raise awareness of environmental conservation, the implementation of sustainable development practices for all activities on the sites (agriculture, heritage management, etc.), or the stability of coastlines and the consideration of climate change through reasoned management with local partners. The Agency owns the sites it acquires and assigns their management to other public or private bodies (regions, departments, local authorities, mixed syndicates, associations, etc.) who employ the wardens responsible for maintaining the sites, developing them and assisting the public.

In addition, the *Conservatoire du littoral* develops cooperation actions on an international scale, based on the values and principles of management that it promotes and encourages in France. The European and International Department strives to share the practices implemented in France in terms of coastal preservation, primarily in regional maritime coastlines in which France is present (first of all with the countries bordering the Mediterranean). The strength and specificity of the international initiative brought by the institution is to accompany the development of its partners by implementing concrete projects on pilot sites, on both institutional and technical levels. As coastal issues are extremely diverse, the Conservatoire is primarily dedicated to assisting its partner countries in the implementation of territorial policies and strategies based on Integrated Coastal Zone Management. It also works on the implementation of actions to promote and develop ecosystems and natural environments, first and foremost the wetlands and small islands. The intervention strategy for the Conservatoire's European and international activity can be summed up in one vision: «To work together for the development of Integrated Coastal Zone Management policies and to act for more and better managed protected coastal areas».

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TECHNICAL PARTNERS

THE “INITIATIVES EUROPE CONSEIL” ASSOCIATION



Founded in 2002, the association brings together a group of professionals working on European issues. Its aim is to support civil society in its actions, at a local as well as European Union level, and to make innovative and solidarity-based projects eligible under European policies and programmes. The IEC offers 3 types of complementary activities: co-ordination and information on European policies and programmes (conferences, workshops, Guides), support for the design and implementation of European projects (structural strategy, project engineering, project management) and theme and/or vocational-based training on European issues (European Institutions, Managing a European project...).

Website: <http://iec.marsnet.org/>

E-mail: iec@initiatives-europe.org

THE SMALL MEDITERRANEAN ISLANDS INITIATIVE (PIM INITIATIVE NGO)



Programme initiated in 2005 by the *Conservatoire du littoral*, the PIM Initiative became an independent international NGO in 2017, continuing its promotion and assistance activities in the management of Mediterranean islands. Its objective is the preservation of these micro-territories through the implementation of concrete actions in the field, by promoting the sharing of know-how and expertise between conservationists and specialists in the Mediterranean basin. Its approach gives priority to simple and pragmatic solutions. Organising meetings and promoting dialogue between nature conservation players, capitalising on and promoting know-how and expertise are the guiding principles of its action.

Website: <http://initiative-pim.org/>

E-mail: pim@initiative-pim.org

THE SMALL ISLAND ORGANIZATION (SMILO NGO)



Launched in 2014 by the *Conservatoire du littoral* and officially established in 2016 as an NGO of the same name, SMILO aims to support small islands measuring less than 150 km² that wish to adopt a more sustainable way of managing their territory. Its field of action covers various transversal themes such as water, sanitation, waste, energy, biodiversity, landscapes and island heritage, in order to initiate integrated territorial projects, in collaboration with all the stakeholders on an island.

Website: <http://www.smilo-program.org/fr/>

E-mail: secretariat@smilo-program.org

FINANCIAL PARTNERS

THE CITY OF MARSEILLE



Historically open to the world and cultivating a long tradition of hospitality, Marseille has become a leading European and Mediterranean metropolis by developing its image and areas of excellence internationally. This popularity is also due to the increasing number of international fact-finding missions, with the aim of sharing its experience in various fields, particularly the sustainable development of its territory. The City of Marseille has supported the Conservatoire du littoral and its actions in favour of the conservation, management and development of small Mediterranean islands for more than 10 years. Within this framework, various actions have been carried out such as the organisation of technical workshops on small island management issues, the production of communication materials and the implementation of large-scale international operations (Celebrate Islands, etc.) or the organisation of international multiplayer training courses on a wide range of subjects (project design and management, preparation of a management document, land-sea ecological engineering, etc.), for the development of shared expertise and know-how between conservation players. The production of the methodological guide «design and manage a project» is in line with these approaches to information-sharing and capacity-building.

Website: <https://www.marseille.fr/>

THE FRENCH FACILITY FOR GLOBAL ENVIRONMENT (FFEM)



At the service of the French cooperation and development policy for the protection of the global environment, the French Facility for Global Environment provides grants to sustainable development projects in areas relevant to the multilateral agreements on the environment signed by France, with the aim of preserving biodiversity, the climate, international waters, land, the ozone layer, and the fight against chemical pollution. The FFEM learns lessons from these pilot projects so that the most effective solutions can be deployed in other locations or on a larger scale.

The FFEM has been supporting the Conservatoire du littoral for several years now, in particular in its support for tangible site management operations and capacity-building activities for managers and players involved in the protection of natural coastal and island areas in developing countries. Since 2016, and every year since then, training courses on the issues of project set-up and management have been organised for Mediterranean partner countries and the African region.

Website: <https://www.ffem.fr>

L'AGENCE DE L'EAU RHÔNE MEDITERRANÉE ET CORSE



The French Water Agency for Rhone Mediterranean and Corsica is a public institution of the Ministry for Sustainable Development, dedicated to water preservation. It collects the water rates levied on all users. Through a multiannual intervention programme, each euro collected is reinvested with local authorities and economic and agricultural players to combat pollution and make better use of the water available. In addition, the water agency gathers information from local stakeholders and produces and shares information on water.

The Water Agency RMC is a key partner of the Conservatoire du littoral on a French and international level, by supporting institutional and technical cooperation projects on conservation issues of wetlands and small islands.

Website: <https://www.eaurmc.fr/>



INTRODUCTION

The publication of this methodological guide is in line with the international training courses organised between 2016 and 2019 by the Conservatoire du littoral with its technical partners, for the benefit of stakeholders involved in the conservation of the natural coastal and island areas of the Mediterranean basin and the African coasts of the Indian Ocean (managers of natural areas, institutional stakeholders, associations, universities, etc).

During these training sessions, the wealth of information and interventions from the participants or experts gave us the idea of producing this methodological guide on project set-up, development and monitoring, combining both conceptual lessons and testimonials from partners (donor agencies or project leaders), who have agreed to share their experience, advice and points of view, and in this way make this theoretical subject more concrete.

Consequently, any public or private organisation can have access to methodological tools to build their project, raise the appropriate financial resources, and implement them transparently and in a joint manner with their team and partners.

We hope this guide will help you build quality projects and ensure the sustainability of your actions.

What is a «project»?

A project is a series of activities structured in stages or steps, enabling the achievement of a defined and precise strategic objective. The project meets objectives in terms of content (a project will lead to results or deliverables), timescale (a project has a beginning and an end) and a budget (in the absence of own funding, it will be necessary to resort to external funding, through a request for support from a donor agency).

Project management will involve planning, organising and monitoring each action in order to meet the deadlines, costs and quality required to ensure its success.

THE KEY STAGES

IN A PROJECT'S LIFECYCLE

PHASE 1

Choose a donor or a call for proposals

Stage 1

- ▶ Analyse the organisation and structure; Develop a project

Stage 2

- ▶ Identify the donor agencies and their programmes; Locate the calls for proposals

Stage 3

- ▶ Choose the best programme for your project; Select the right call for proposals

PHASE 2

Design your project; draft and supervise the application

Stage 4

- ▶ Adapt to the expectations of the call for proposals; identify the application procedures

Stage 5

- ▶ Share and design the future project; Draw up and submit your application

PHASE 3

Execute the project

Stage 6

- ▶ Sign the Contract or the Agreement ; Understand and share the commitments; build and share monitoring tools

Stage 7

- ▶ Carry out the actions, allocate the budget and mobilise the teams and partners

PHASE 4

Carry out reports and prepare for the control

Stage 8

- ▶ Collect proofs of project implementation; Assess the impact and quality of the actions; Draft intermediate progress reports

PHASE 5

Close and sustain the project

Stage 9

- ▶ Assess the project and submit it to the donor; Record and file the supporting documents; Be available for audits

Stage 10

- ▶ Sustain and promote the results and benefits

PHASE 1 | CHOOSE A DONOR OR A CALL FOR PROPOSALS

STAGE 1

ANALYSE THE ORGANISATION AND STRUCTURE; DEVELOP A PROJECT

Every project begins with an idea, a need, an opportunity identified by one or more employees, partners or volunteers of an organisation.

A project is sometimes hastily designed and proposed to a donor to meet the deadlines. This rush can have negative consequences for the project and rarely leads to the construction of solid, structuring and quality proposals.

This is why the pre-project is an essential stage for an organisation, in order to have an overall and shared vision of its structure and to be able to propose a project that responds to the challenges of its organisation. It allows you to:

- Clearly identify the needs (of its organisation, of the targeted territory...) and to clearly express the «central» idea of the project;
- Jointly review, in a collective and shared manner, the means available, the strategic orientations in which it fits...
- Engage in a constructive discussion with their hierarchy and team to facilitate their ownership and commitment to the process;
- Establish the link between the specific project and the organisation's overall strategy (which often fits into a broader vision).

This prerequisite is a quality factor for an operation and its future impacts. It reinforces your chances of success in obtaining financing.



Fabrice BERNARD (Conservatoire du littoral, France) : «A project should evolve from a well-defined need that should be in line with a territory's conservation and development strategy. It could be a project that fits into the vision of a plan or management scheme for a natural area, or a territorial approach such as «Agenda 21 local.»



Jérémie DUBOIS (Var Department, France): «Understanding the demand, defining its human and financial dimensions and its temporality is essential, because if the project does not respond to a need, it will fail at some point.»



Pierre BOISSERY (French Water Agency RMC): «The project owner's motivation is the most important point. It is the guarantee that the project will be carried out successfully, whatever the difficulties encountered. This motivation is not only based on the political decision alone, but also on their involvement in the project management and their capacity to assume all or part of the financial expenses. But this is not enough. It is also necessary to assess the relevance of the project and the appropriateness of the means proposed to carry it out. The execution schedule, the cost and solidity of the financing plan are also elements to be assessed as soon as the project emerges. Engaging in a project is not just a matter of finding funding».

ANALYSE ITS ORGANISATION

The first step is to ask a few questions:

What is my organisation's purpose?

The goal, the missions of the company, the department, the objectives pursued? etc.

What are the activities proposed by my organisation?

The concrete achievements of the structure, the actions it implements on a recurring and ad hoc basis...

Who are the beneficiaries of the activities?

The target groups (direct), the final beneficiaries (indirect), the users, etc.

Where is my organisation locally integrated?

The area of intervention, the location of the partners...

What are the means available for action?

Human resources, budget, equipment, volunteers, networks ...

What is the economic model of my organisation?

The sources of revenue, income, main expenditure items, scope for development, structuring, etc.

What are the Strengths - Weaknesses - Opportunities - Threats?

S.W.O.T. analysis [\[see tool 1\]](#)



David DEMONBRISON (BRL ingénierie, France): «Before looking for financing, the demand you want to meet, as well as its structure should be analysed, and the project's strengths and weaknesses should be checked. This makes it possible to identify complementary partners to consolidate the analysis of the demand and obtain support for certain aspects of the project.

It is also necessary to determine whether there is a determination, legitimacy and support to carry out this project. Carrying out the collective diagnosis makes it possible to answer these questions and to have a project based on the actual situation for better feasibility and acceptability of the project».

[**TOOL 1**]

Focus on the S.W.O.T. analysis

S.W.O.T analysis (Strengths - Weaknesses - Opportunities - Threats):

It is a strategy analysis tool. It combines the study of the strengths and weaknesses of an organisation, a geographical area, or a sector, with the study of the opportunities and threats to their environment, as such, it is instrumental in development strategy formulation. As the SWOT analysis is based on the judgement of the participants, it is subjective and qualitative and can also be applied to actions or means.



S - Study of Strengths

Strengths are positive internal factors that are controlled by the organisation and which provide foundations for the future.

O - Study of Opportunities

Opportunities are the external positive possibilities which can be taken advantage of in the context of current strengths and weaknesses. They develop outside the organisation’s field of influence or at the margins (e.g. favourable public policies, economic development, etc.)

W - Study of weaknesses

Weaknesses are negative internal elements, which are controlled by the organisation, and for which key improvements can be made.

T - Study of threats

Threats are external difficulties, obstacles or limitations which can prevent or limit the development of an organisation or sector. They are often beyond the organisation’s field of influence or at its margins (e.g. legislative reforms, competition, crises, etc.)

CARRY OUT A COLLECTIVE AND SHARED DIAGNOSIS

The project manager(s) consult the stakeholders in their organisation jointly or individually, in order to carry out the most exhaustive diagnosis possible of their structure.

Some responses to be considered: what are the structure's current and future needs? what are the major shortcomings and weaknesses of our organisation and its actions? what are the problems that your project will address/situation that your project will change? does the structure have the human, financial and technical means to carry out this project successfully? which partners must be involved? ...

All these answers will help you to expand the initial idea!

All these answers will help you to expand the initial idea!

- strengthen the case for your future project;
- determine the changes you would like to see;
- identify partners who may assist you;
- progressively involve potential donors;
- mobilise an internal project team towards a shared goal.



Entela PINGULI ((National Coastline Agency, Albania): «Before embarking on a project, the priorities of its structure as well as the priorities of the targeted beneficiaries should be clearly defined. Debates, consultations and meetings can be conducted with all the stakeholders of the future project. In addition to the internal team, this stage must therefore involve the expertise of local partners and other stakeholders, making it possible to assess the relevance of the project to the needs of the beneficiaries for the acceptability of the project».



Pierre BOISSERY ((French Water Agency RMC): «Collaboration is necessary. It is sometimes an obstacle or a symbol of frustration. It should not replace the prerogatives or obligations of decision-makers and elected officials. It should not be a reason to delay the implementation schedule. It is often complex, energy-consuming and unproductive. It is a genuine tool that requires resources and expertise. The simple fact of bringing participants together in a meeting cannot be considered collaboration»

LAY THE FOUNDATIONS OF A PRE-PROJECT AND VALIDATE IT WITH THE DECISION-MAKERS

Once the diagnosis has been carried out, it is recommended to formulate the key concept(s) of your pre-project in order to share your analysis and involve your hierarchy.

Briefly:

- The context in which the project occurs (current and future needs)
- The problem to be addressed; the opportunities to be seized.
- The reasons for this project, its objectives.
- The anticipated results at the end of the project.
- The actions necessary to achieve the expected results.
- The internal skills; the experiences that legitimise the initiative.
- The link with the structure's activity.
- The schedule items available to you.
- The potential leads for partnerships and funding opportunities

In short, you must present the project logic based on your analysis, the beginning of your logical framework, your action plan and your estimated budget.

The communication with your decision-makers meets a triple requirement:

- to inform your hierarchy of the project objectives;
- to communicate the thinking behind the project logic;
- to gather comments and opinions to encourage the decision-makers to own the pre-project.

This presentation must be informative and instructive! It will allow you to define the foundation for a concept-note.

**Régis LEYMARIE** (Conservatoire du littoral, France):

How do you convince your hierarchy to go ahead with a project (at the risk that it might not be accepted)? You must accept seeing the «opportunities» and the «threats» and integrate the possibility that it will lead to nothing. It is important in this case to anticipate and prepare a possible plan B, based on parallel financing opportunities, while keeping in mind that it is still complicated to «have more than one iron in the fire».

Fabrice BERNARD (Conservatoire du littoral, France):

«A project must be clear and understandable in a few sentences, which is why it is important to avoid piling up compelling ideas and listing too many axes which would not all converge towards a single goal clearly identifiable to all the project stakeholders».

BRINGING THE PROJECT TO LIFE : THE CONCEPT-NOTE

The summary of your diagnosis and the sharing of your pre-project with the stakeholders of your organisation allows you to lay the foundations of a solid project, full of meaning and transformation. It is time to draft your «Concept-Note» and set out your action plan.

Our recommendation is to produce a brief outline of 4-5 pages maximum, laying the foundations of your project. Do not forget that a project is a one-off operation in the life of a structure that allows you to change a starting situation. There is a Before and After for your organisation.

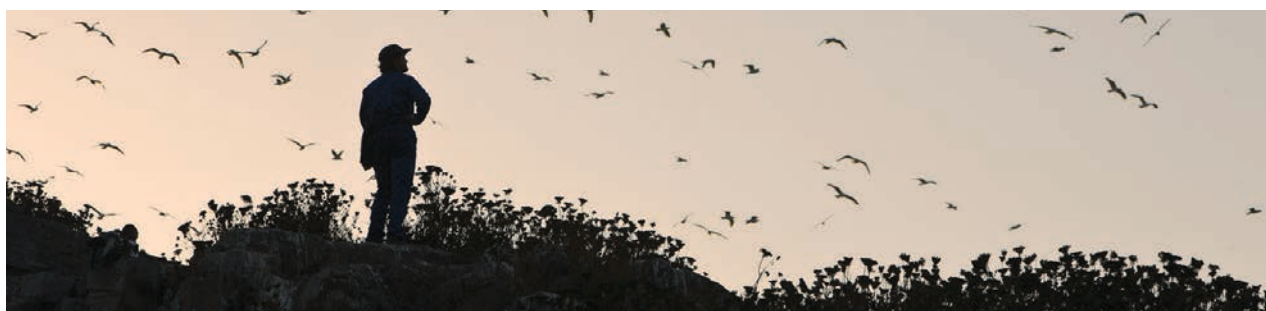
The Concept-Note (also called Opportunity Note, Framing Note, Summary Note, etc.) [\[see Tool 2\]](#) will allow you to communicate effectively both internally and with partners. It is also the anchor point for your future requests for financial support.

The action plan (for the moment it is the provisional schedule outline) allows you to evaluate the duration of your project and to anticipate the implementation of the activities of your operation over time.



Marianne LANG (MedPAN, France):

«For the Call for Small Projects launched by MedPAN, we did not establish a fixed framework for the concept note. The idea is to outline the project, highlighting the project relevance (project justification), the feasibility of the results according to the budget and planned schedule and finally the coherence of the planned activities (is it the priority?)».



Sylvain PETIT (SMILO Association, France) :

«When you set up a project, you must avoid thinking first and foremost about funding (even if truthfully, money is the key to an association's success). However, it is important to ask the right questions and to ensure with well-founded reasoning that the project is beneficial for the organisation, for the identified territory and that it is unifying with the (technical and financial) partners and other stakeholders involved. By focusing only on the money, the project risks to lose its meaning».

[TOOL 2]

Elements of the “Concept-Note”**Project title:**

→ is it enough attractive and appealing?

Tip: find a specific short and punchy acronym or name

A brief description of your structure and contacts:

→: For the exchanges with your future partners

Tip: A few lines about your structure and the project leader contacts

The overall objective of the operation:

→ What change is expected at the end of the project?

Example: «Better management and protection of coastal biodiversity in the Var Department by strengthening the skills of coastal area managers».

Project targets:

→ Who are the audiences that your project is aimed at and with whom will you act? Who are the final recipients of your operation?

Example: target audiences - wardens, elected officials, professionals. Final beneficiaries: inhabitants, users, tourists....

The anticipated major results:

→ What will your project produce in terms of quality and quantity?

Example: the training of x professionals; the implementation of x management plan, x km of protected coastline; 1 communication and user awareness campaign...

Key planned activities:

→ What are the actions to be implemented to attain the stated results?

Tip: identify the main activities of your project and the associated tasks and group them into main work-package

Example: 1. Training professionals;
2. Consultation and production of coastal management plans with managers,
3. Communication and awareness raising,
4. Project coordination and governance;

Identified/preferred partners:

→ Which private and public partners should you involve in your project?

Example: coastal managers; land-user associations...

Budget estimate:

→ What are the planned expenditure items for the project (human resources, mission and travel expenses, external services, works, ...)? What funding sources have you identified to facilitate the project? What co-financing can I contribute (internal resources or other project)? Finally, what is the anticipated total amount?

The rolling timeline and action plan:

→ How long will your project last? What are the main stages of your operation? How will you organise the activities to carry out your operation?

Example: Project duration - 24 months,
1. Training - t+6 to t+12;
2. consultation - t+2 to t+18;
3. publicity campaign - t+13 to t+24; coordination and governance from t0 to t+24;

Grounds for recourse to the donor

→ How does the project fit into the strategy and meet the donor’s target criteria and issues;



STAGE 2

IDENTIFY THE DONORS AGENCIES AND THEIR PROGRAMMES; LOCATE THE CALLS FOR PROPOSALS

There are several sources of project funding for an organisation, whether public or private.

Faced with the general decline in public funding, organisations are inclined to turn to private funding (patronage, sponsorship, donations) or to calls for projects from international donors, foundations or European programmes.

THE ASSOCIATION'S OWN RESOURCES

Pour se financer, l'association est libre d'exiger ou
In order to auto-finance, the association is free to request a contribution fee from its members of a preferred amount that may differ according to the member category. However, the subscription fee must never give rise to a compensation.

Associations may also engage in profit-making activities, provided that there is no sharing of the profits made and that the profit-making activities carried out have been provided for in their by-laws. In such cases, they may have to pay taxes (corporation tax, VAT and the economic contribution (CET).

According to the national legal frameworks, any association may nevertheless organise up to six support events (e.g. *up to six events in France, such as lotto, shows, flea markets, sports events, etc. and within their framework up to five refreshment stands*), during the year, while at the same time remaining exempt from commercial taxes (VAT, corporation and business tax) and payroll tax.

THE SUBSIDIES

Many public and private donors can subsidise the financing of an organisation. This could be year-round support or support for a specific project. Theoretically, in both cases the subsidy is not there to support the actual running of the organisation, but rather to help set up projects and actions.

In general, the more contacts you have with donors, the easier it will be to award these grants, hence

the interest in participating in the local committees and networks in your areas of activity (at the level of local or national institutions as well as European or international networks).

To obtain funding, you must demonstrate the durability, seriousness, competence and independence of your structure.

The description of your organisation and its achievements is therefore important and must demonstrate the correct structuring of your activities, the sustainability of your organisation, compliance with tax regulations, describe its history, provide information on the statutes...

Specify your annual budget, your annual activity plan, for associations the number of your members... You will need to describe and financially measure each of the actions you wish to implement, so that the funding donor is accountable for the financial commitment it undertakes with you.

For an association that is subsidised regularly, year after year and by the same donor, you could consider setting up an agreement. This will make things easier by avoiding resuming negotiations from scratch every year, even if you will also be required to justify yourself and submit a full report to your partner at the end of the year. This type of agreement also makes it possible, in the event of a change in your contact person within the partner structure, to maintain dialogue over and above interpersonal issues on a long-term basis.

You can also apply for a grant for a specific, one-off event, from a partner who already subsidises you

or by canvassing new institutions. Once again, it will be necessary to precisely target requests according to the type and size of the event:

- present projects to the administration, a local project to the town hall; departmental to the departmental or provincial council or to local ministry delegations...
- target the type of institutions potentially interested in your project.

The greatest challenge will be to demonstrate the general interest of the project. This will require demonstrating the real impact on the territory or the widest possible population.

Public institutions are also, and increasingly so, inviting socio-economic actors to position themselves on Calls for Projects or Calls for Proposals that enable them to implement the public policies for which they are responsible.

THE PATRONAGE

Patronage is material support brought without direct counterpart, to a work or a person for the exercise of activities of general interest. Be careful not to confuse patronage and sponsoring, which are services of an advertising nature generating advertising revenue, considered as a lucrative activity.

FOUNDATIONS AND CALLS FOR PROJECTS

Competitions and calls for proposals from foundations present real opportunities for the funding of private and public organisations.

In France, there are approximately 550 foundations acknowledged as being of public utility, 250 corporate foundations and several dozen endowment funds, dedicated to a very wide range of causes.

Endowment funds allow any association working in the general interest to diversify its potential funding. Any association can create its own endowment fund. However, associations that are grouped together can set up a mutual fund to obtain greater visibility among patrons.



Sami BEN HAJ

(Cabinet Thétis, consulting ecologist, Tunisia):

«In order not to miss any opportunity, you have to keep an eye on the donor agencies, their programmes, their management, eligibility in general (who their tenders are addressed to, etc.). This prevents a rushed project preparation and allows for careful presentation».

Pierre BOISSERY

(French Water Agency RMC) :

«The search for funding is an important and delicate subject that conditions the project lifecycle. It is not uncommon for a project to be submitted to various donor agencies. This raises the issue of cross-funding, different grant application packages, different payment terms and balances, different signage or communication. Care must be taken as early as possible to ensure that the «partnership» framework is well established and that the administrative procedures for the payment of subsidies have been accurately assessed in order to avoid cash flow problems. The balance phase of an operation should also not be minimised. In the end, it is often the last impression a donor has of the project».



A FEW EXAMPLES OF KEY DONORS FOR ENVIRONMENTAL PROTECTION AND THE FIGHT AGAINST GLOBAL WARMING

The French Facility for Global Environment (Fonds Français pour l'Environnement Mondial, FFEM) <https://www.ffem.fr/fr> **Objective:** Reconciling the preservation of the global environment and local development in developing countries

The Global Environment Facility (GEF) <https://www.thegef.org/>
Objective: to tackle our planet's most pressing environmental problems.

The French Development Agency (Agence française de développement, AFD) <https://www.afd.fr/fr>
Objective: crisis management, peace and sustainability in developing countries

The Critical Ecosystem Partnership Fund (CEPF) <https://www.cepf.net/>
Objective: empowers civil society to protect some of the world's biodiversity hotspots

The Prince Albert II of Monaco Foundation (FPA2) <http://www.fpa2.org/>
Objective: to support initiatives in the fields of research and studies, technological innovation and socially-aware practices for the protection of the environment and the promotion of sustainable development on a global scale

The MAVA Foundation <http://mava-foundation.org/>
Objective: to support conservation projects for the benefit of people and nature with a network of partners in the Mediterranean, West Africa and Switzerland

The World Bank <https://www.worldbank.org/>
Objective: commitment to end extreme poverty and promote shared prosperity in a sustainable way.

The GIZ (German Corporation for International Cooperation) <https://www.giz.de/en/>
Objective: provide tailor-made solutions through international cooperation focusing on sustainable development and education.

The European Union and its multi-annual programmes (policies and programmes at https://ec.europa.eu/info/funding-tenders_fr) :

- The LIFE programme <http://ec.europa.eu/environment/life>
- The ENI CBC Med Programme <http://www.enpicbcmmed.eu>
- The Interreg Italy-France Maritime Programme <http://interreg-maritime.eu>
- The Horizon 2020 programme <http://ec.europa.eu/research>

The Small Initiatives for Civil Society Organisations in North Africa Programme (PPI Oscan - Programme de petites initiatives pour les organisations de la société civile d'Afrique du Nord) <http://www.ppioscan.org/>

Objective: to strengthen the technical, administrative and financial capacity of CSOs in the four North African countries (Algeria, Libya, Morocco and Tunisia), so that in the short-term they are able to develop specific field initiatives, and in the longer term, contribute to the implementation of strategies and national action plans for the conservation and enhancement of biodiversity, sustainable management of natural resources, and mitigation of negative climate change effects.

The MedFund (trust fund)

Objective: contribute to the sustainable financing of effective management of marine protected areas (MPAs) in Mediterranean countries by sustaining their funding, mainly for activities that currently receive little or no funding and which are in line with the implementation of their management plan.

The MedPAN Call for Projects http://medpan.org/fr/activites_principales/appels-a-petits-projets-2/

Objective: to provide direct support to MPA managers for the implementation of concrete actions, which can improve management effectiveness, test pilot schemes or set up tools that can be useful to other MPAs.

HOW TO LOCATE A DONOR OR A CALL FOR PROPOSALS?

Study donor profiles
on the web

Identify their strategies,
their funding policies,
their areas of intervention,
their action schedules

Find out what projects they have
funded in the past

Validate their relevance
to your projects, your activities
and your territories

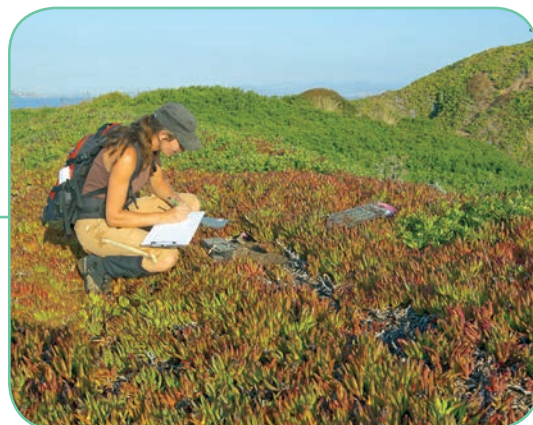
Bookmark them in your
browser favorites

Regularly monitor their sites
to ensure that you do not miss
the calls for proposals

Develop your network and become
familiar with the functioning of the
targeted financial partner.

Get in touch with them
(request an appointment,
participate in the events
they organise or attend, etc.)

Send them a presentation of your
organisation and your projects
(summary note)



STAGE 3

CHOOSE THE BEST PROGRAMME FOR YOUR PROJECT; SELECT THE RIGHT CALL FOR PROPOSALS

This stage aims to confirm the coherence between the project proposed by your structure and the funding you wish to apply for.

Collect the key documents and read them:

- The Financial Partners Strategy (general - Operational Programme for European Projects - or specific - Annual work programme)

Information to be identified: action strategy, main lines of intervention, thematic priorities, programme implementation indicators, etc.

- The calls for projects/proposals

Information to be identified: types d'actions à mettre en œuvre, candidats élitiques of actions to be implemented, eligible applicants, duration of actions, rules for financing operations, etc.

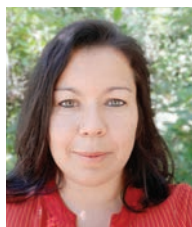
- The applicant's guide or administrative and financial manual

Information to be identified: rules for project implementation, how to submit the application, project leader obligations, contractual procedures, etc.

- The application file and its annexes

These are the documents that you must fill in online or submit in paper version (application forms; budget; logical framework; administrative documents...).

You can compile a sheet summarising the main items for each donor. Specific attention should be given to the financial aspects.



Céline DAMERY
(Conservatoire du littoral, France) :

« Payments can be made in different ways depending on the donors. You can receive an advance at the start of the project (30%) and the balance based on the final financial report. For long projects (4-5 years), annual payment demands can be made, again on the basis of a report. For certain European projects, the expenditure reports are made every 6 months. For others, such as multi-partner projects, expenditure escalation is carried out jointly once a certain threshold has been exceeded by the Partnership as a whole. The deadlines for the study and validation of reports by the Donors can sometimes be long. It is therefore essential to have all these elements in mind from the outset of the project to avoid any subsequent cash flow problems for the organisation ».

PROJECT X - SHEET 1	
The donor	Name, statutes, contacts
The Donor/Programme	Title and links leading to it
The call for projects	Title and links leading to it
The objectives	Call context and objective
Projected Results	The changes that the project is expected to make to the baseline situation
The actions addressed	The type of action that the Senior responsible owner SRO can submit
The partnership	The minimum number and type of national or international partners required to apply
The beneficiaries	The type of project SRO that can apply
The target and priority audiences	Public impacted by the project
The territory	The geographical area in which the project takes place
Financing	The financing rate (percentage of the total budget financed by the donors); the funding amount proposed by the donor for each project; the terms of payment; the possibility of financing salaries; the possibility of financing operating costs (often as a percentage of the overall project)
The schedule	The dates for submission of applications; the period in which the project must be registered
Application procedure	Online procedure; Digital platform; Hard copies.

You can now check the eligibility of your structure and project and select the appropriate donor. Check your Concept Note and donor worksheet!

- Is my structure included in the eligible beneficiaries category in the call for projects?
- Does my project fit into one of the donor's strategic axes/programme areas of intervention?
- Will my project be implemented in the area covered by the call for proposals and within the proposed timeframe?
- In the case of international cooperation projects, do I already have the right partner network or how do I get in touch with them?
- Does my project include actions approved by the call for proposals?
- How will I co-finance my project?
- What will my obligations be (expenditure justification procedures, reports...)?
- What changes will I need to make to my initial project?



PHASE 2**DESIGN YOUR PROJECT;
DRAFT AND SUPERVISE
THE APPLICATION****STAGE 4****ADAPT TO THE EXPECTATIONS
OF THE CALL FOR PROPOSALS;
IDENTIFY THE APPLICATION
PROCEDURES**

The call for proposals or call for projects is issued by a public or private institution when they intend to select several relevant projects in a field of activity for funding.

It combines a number of elements: the objectives in question and the annual budget allocated to the types of actions involved, the eligibility, exclusion, selection and award criteria and the relevant supporting documents to be submitted; the funding conditions; the conditions for the submission of proposals; the potential launch date for co-financed actions and the schedule for the award procedure.

The expectations may vary or assume a differing significance in accordance to the donor selected. It is your responsibility to correctly identify what the donor clearly wishes to fund and their objectives, and to potentially adjust your project before you begin drafting it.

Therefore, calls for projects can be focused on:

- results (products and/or services obtained)
- impact (long-term change; contribution to a broader goal)
- innovation (introduction of a new or improved process, method, organisation of a product or service);
- the region (regional coverage of the actions and results of the project)
- cooperation between partners (the number and type of stakeholders involved in the project)
- the target audiences (the typology and number of beneficiaries affected by the project)

The application selection criteria, which is frequently indicated, can help you to successfully place your project. They can be variable and are varied.

Example of criteria for a Call for Proposals related to interregional tourism

Criteria relating to the project's contribution to the Programme's objectives

- Contribution to the increase in visitor numbers during the summer months
- Interregional added value

Criteria relating to the quality of the project at the application stage

- Innovative nature of the project (new cooperation, new tourism services...)
- Number of territorial areas impacted directly or indirectly
- Impact on the coastal tourism experience for young and low-income groups

Criteria related to the administrative and financial requirements of the programme

- Financial capacity of the project leader: solvency, financial independence,
- Human resources dedicated to management of the project

Example of criteria for a Call for cooperation projects in the field of training

Relevance of the project in relation to:

- the objectives of the programme
- the requirements and objectives of the participants

Quality of the project's design and implementation

- coherence between the project objectives and the proposed activities
- quality of cooperation and communication between the participating organisations
- quality of mechanisms for the recognition and validation of educational achievements

Impact and distribution

- potential impact of the project on the participants as well as the participating organisations
- measures aimed at distributing the project results



Awatef ABIADH (RIT CEPF/ LPO, France): «A good project is one that meets all of the donor's expectations and is in line with your own funding strategy. To demonstrate that it is part of an overall dynamic and in synergy with all the stakeholders involved, the project must respond to requirements but must also take into account projects and initiatives that are being implemented or were implemented prior to the project. In order to have a better chance of being selected, it is important to have innovative but realistic ideas in response to biodiversity or habitat conservation issues»;

However, bear in mind that your project stems from an observation and a need and that it should not be «distorted» for funding purposes. On the other hand, it is possible to adapt it to the Donor's expectations by adding a new dimension to the project or by highlighting the impacts of the planned activities to meet the Donor's expectations.



David DE MONBRISON (BRL ingénierie, France):

«You don't change your project to suit the funding, you plan it and then you find suitable funding. You adapt, you adjust your project with the appropriate funding source, but most of all you don't give up, you build on your assets, and if the donor contests certain points of the project, you bring in consultants, experts or other partners to reassure the donor».



Pierre BOISSERY (French Water Agency RMC): «Donors are rarely bankers. They have their own objectives, experience or even expertise, a well-established network of experts and examples of feedback. They also have requirements in terms of performance, communication, cross-partnerships, etc. A project must also be designed according

to the objectives or priorities defined by these donors, otherwise, it will quickly become excluded as non-eligible».

If any questions or queries arise, please remember to get in touch with the financial partners as quickly as possible.



Elodie RANDRIANARIANARIJAONA (RIT CEPF, Tany Meva Foundation, Madagascar): «When in doubt, you should consult with your financial partner to fully understand their expectations. Whatever the phase of the project, whether it is during the launch of the call for projects, during the drafting of the project or after the

signature of the contract, communication is essential».



Fabrice BERNARD (Conservatoire du littoral, France):

«Establishing contact with the donors during the setting up phase is important; the classic error is to set up a project and submit it without consulting the donors. Even if some donors are not easy to reach, you should still try to contact them, it is a guarantee of commitment, a proof of motivation, a demonstration of interest in negotiating and listening to a partner and confirmation of your willingness to succeed».

Calls for proposals are generally published on the donors website. It is important for the project leader to be aware of the application procedures, which may vary from one donor to the next:

Date of publication of the call for proposals

Deadline for applications

How to apply

By stage

A brief note or note of intention then the complete file

Complete file

With all appendices and supporting documents

Methods of submitting applications



Dematerialized procedure

Stage 1. Login and create a user account on the donor's platform
Stage 2. Complete the application by filling in the fields
Stage 3. Apply by submitting your file online
Stage 4. Print and sign the application file, send one original by mail



Standard procedure

Stage 1. Retrieve the blank application form and all files necessary for the application
Stage 2. Complete the application by filling in the different forms
Stage 3. Print and sign the application, send one or more originals by mail and e-mail

Donor's application selection schedule

If application accepted

Start-up date of actions

If application refused

Date of new application

STAGE 5

SHARE AND DESIGN THE FUTURE PROJECT; DRAW UP AND SUBMIT YOUR APPLICATION

A project is never completed by itself!

The design of an operation and the drafting of an application therefore require the involvement of all stakeholders participating in your future actions.

- Set up a project team as quickly as possible:

Identify all the people to be involved in your structure for the preparation of the application (legal representative, accountant, project manager, technician,...) and share their contacts in a joint address book

- Share information: Organise one or more meetings with your project team, share all the documents necessary for the application (call for projects, applicant's guide, application forms, concept-note...)
- Split up the work and duties: According to each person's expertise and future involvement in the project
- Construct the Reverse Planning: Indicate the stages to be carried out to submit the application (registration procedures on the online application platform, submission date), the period of evaluation by the instructor service, the probable project start date



Sami BEN HAJ (Cabinet Thétis, consulting ecologist, Tunisia):

«Partnership agreements or letters of support can be signed at an early stage of the project, which gives credibility when the application is submitted and shows that the project is already part of a regional approach. For example, a letter from the management structure of a protected area could be useful to an association wishing to submit a project for the implementation of activities in this area. However, this is something that should be anticipated, and you shouldn't wait until the day before to request this type of letter from partners».





Céline DAMERY (Conservatoire du Littoral, France): «Never wait until the last moment to submit a project, especially if you submit online! Firstly, due to the increasing number of people on the platform as the deadline approaches, «bugs» can occur that only add to the stress! Secondly, the various input headings are not always very flexible and can be limited in the number of characters, which means that some texts have to be revised at the last minute».

Fabrice BERNARD (Conservatoire du littoral, France):

«If the project involves several national or international partners or if you need to submit letters of support with your application, don't wait until the last few days before making contact. Being associated with a project in the closing stages is rather inconvenient...it suggests that your contribution is more symbolic than technical».

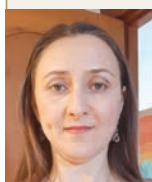
THE ROLE OF PROJECT MANAGER

The Project Manager is the person in charge of conducting a project and managing its implementation, notably by supervising the team and partners and managing the budget. The selection of a project manager is important because their role is specific, and their missions varied. If they are already present in the structure they may be involved as early as the drafting phase, or they may only be recruited at the beginning of the project implementation.



Entela PINGULI ((National Coastline Agency, Albania): «The Project Manager is responsible for maintaining group solidarity and ensuring the correct performance of the project, which is why it is important that they have a wide range of qualities, they must be:

- Organised and structured
- Good leaders, bring teams together and be attentive to their needs
- Good communicators, at ease when speaking and writing
- Open-minded and a mediator
- Confident and visionary



Saba GUELLOUZ (RAC-SPA, Tunisia): «As a project manager, you must first of all be responsible for bringing together all the stakeholders in the project, be organised with a logical project framework, a clear schedule and budget, enforce positive and proactive team management, be persevering and have a lot of self-control. To lead the project and mobilise their team, information must first be distributed, everybody must have access to the same level of information as well as the essential project documents. Everyone must know which activity they are responsible for and have a deadline for execution. A project manager must also know how to listen, especially to the initiatives or opinions of team members, and give everyone a margin of freedom in their responsibilities. A project is never completed alone! I recommend holding regular staff meetings to discuss all aspects: the accomplishments, difficulties, scheduling, deadlines, new ideas... and the same goes for the assessment, which must be collective.»



Manel BEN ISMAIL, (Notre Grand Bleu Association, Tunisia): «There is no specific model to being a good project manager, but there are some particularly important qualities such as openness to collaborate, wisdom in certain situations but also sensitivity towards others. Listening to others, always putting yourself in the place of others, and being transparent to your audience makes communication easier and also helps you to gain your partners trust.»

Begin the process of drafting the application

Your application file describes the project that you will be expected to carry out if it is selected by the donor.

This application file can be built using the tools and approaches of the structure itself, but financial partners often impose a specific model for drafting the project with well-defined expectations (this is why the expectations of the financial partners must be carefully read).

The file and its appendices will ultimately be subject to a contract and will constitute the specifications for your operation.

As such, it is important to be vigilant and realistic about what you propose in your operation so that your project can respect your initial commitment. Generally speaking, you can build your project by applying the following approach:

- Update the concept note (or descriptive document), filling in any elements that may be missing or worthy of detail
- Implement the project's logical framework
- Carry out the detailed action plan (over time)
- Construct the budget per activity/per result
- Supplement the file with evidence of your project management experience.



Elodie DOZE (consultant, France): «Sometimes the person who plans the project is not the person who will implement it.

Consequently, sometimes they can be too ambitious or approximate in the drafting of the project (for the budget, indicators, etc.), which can cause problems during its implementation, leading to inevitable modifications that can be administratively cumbersome. It is therefore important for the person in charge of drafting, to ensure the feasibility of the draft proposal by discussing it internally. Similarly, the sponsor who will coordinate or carry out the project must fully integrate the expectations and objectives of the project so as not to embark on activities that are impossible to carry out»



1. PROJECT NARRATIVE

YOU MUST DEMONSTRATE THE DURABILITY, SERIOUSNESS AND INDEPENDENCE OF YOUR STRUCTURE REGARDLESS OF THE DONOR.

The description of your organisation and its accomplishments is therefore important and should include the following:

- the correct structuring of your activities,
- the durability of your structure,
- the compliance with regulations,
- a description of its history

- details of the annual budget (origin of the funds...)
- the annual business plan
- experiences with similar projects
- for an association: the number of members

Note: the same applies to partner organisations in the case of a cooperation project

BE CAREFUL WHEN DRAFTING AND PHRASING

- Keep in mind that a reviewer has rarely more than 3 hours to spend on your proposal: write it in a way that makes it easy for them, be concise and explain/demonstrate!
- Always adhere strictly to the model (if provided by the donor) and, if necessary, have a well-structured and neat presentation;
- Use simple terms, short sentences and avoid jargon and acronyms;
- Pay close attention to syntax and spelling;
- Fill in all sections and do not leave any fields blank in the administrative forms.



Noëlle TASSY (Cabinet CDI, Consulting firm, France):

To respond to a call for projects, you need perseverance, rigour, imagination and innovation, for example in the practice of the partner, or to transfer the innovation to a territory».

Commit only to results, deliverables and indicators that you can control:

The results or outcomes:

These are the changes and benefits that will result from your project and the activities you propose to implement. The results of a project can be tangible

or not. They should be produced, used, tested, evaluated, distributed and exploited during and after the project.

They indicate the successful completion of your project. There are various types of results, the following are examples:

The «products»

A tangible and sustainable production: reports and studies; innovative training manuals and tools; conferences, public awareness campaigns, seminars, debates...

The «methods»

An improvement in the participants understanding of a given field and theme; processes and methods of collaboration; acquired management know-how, sharing of ideas and good practice.

The «experiences»

An intangible benefit which is less sustainable than a product or a method; which can be acquired by the project partners, people after periods of mobility; an exchange in practices through the formation of networks...

The «learnings»

An overall experience acquired at the end of a programme or particularly innovative or effective individual projects. Their application is ensured by key opinion formers on a much larger scale of «systems».



Awatef ABIADH : (RIT CEPF/ LPO, France): «The execution must follow the logical framework set out in the project. In its «implementation» phase, the project must achieve the expected results and established indicators. If 10 or more training courses with about 100 participants is planned in the project, they should be implemented! The indicators can be conservation indicators: change the number of endemic species, the project must achieve the expected results unless there are external risks that it is important to foresee in the «project set-up» phase. There are also unpredictable risks (such as a storm) that can be accepted if the expected results are not achieved. An example of potential risks: lack of co-operation with certain stakeholders in the territory who do not adhere to the project.»

Deliverables (Outputs):

A deliverable (Output or Product) is any result, document, measurable, tangible or auditable, that results from the completion of a part of a project or a project.

Outcome Indicators:

They measure the direct and immediate result for the recipients on completion of the project. These indicators may be physical or financial in nature (area of protected territory, number of graduating trainees, etc.)

Output (or monitoring) indicators:

They apply to the actions carried out during the project.

They are measured in physical or monetary units (e.g. area of territory concerned by the action, number of training courses offered, number of people trained, etc.)

An indicator is important because it:

- provides concrete evidence that the results will be achieved or not;
- allows objective and/or scientific decisions to be taken in relation to the project and activities;
- allows comparison of the results actually obtained with the planned targets;
- defines the collected information;
- guides and motivates staff and partners to achieve results.

An indicator is both quantitative and qualitative.

Examples of indicators	
Quantitative	Qualitative
Trainee training expenses Number of trainees trained Improvement of production yield after training	Quality of training received by trainees Trainee motivations, capacity to transmit information Satisfaction of companies/structures concerned



Mathieu THEVENET (PIM Initiative, France): «Whatever the indicator, it is considered important to check that it corresponds to the «SMART» objectives: Specific, Measurable, Attainable, Realistic, Timed».

For an indicator to be relevant, it must be:

1. Direct, i.e. it unambiguously measures progress
2. Directly related to the interventions
3. Relevant, i.e., it measures factors that reflect the intended objectives
4. Varying between groups, zones
5. Varying over time
6. Sensitive to interventions, it changes in proportion to changes in the elements measured
7. Cannot be manipulated or subject to deviations (external causes)
8. Easy to measure and understand
9. Reliable
10. Consistent with the decision-making cycle

Common examples...	
Projected Results	Indicators
A percentage of the target population	E.g.: Percentage of managers who attended a training course
A number	E.g.: Number of managers who attended a training course
An average	Average of managers who attended a training course

DESCRIBE THE ACTIVITIES AND RESULTS CLEARLY:

Whether in the form of a «Logical Framework», a «work package» or «components», the objective is to show the Donor that your project is well thought-out, realistic, coherent and structured.

Work Package

A project can be broken down into several work units (Work-Packages, Task Groups, Components...)

These units each have:

- a very specific objective in the project
- identified partners (or even subcontractors)
- specific expenses
- a specific duration for the project
- final or intermediate results
- deliverables

Work package examples:

WP1 : Project Preparation/Assembly

WP2 : Management - Coordination

WP3 : Communication

+ Other technical Work Packages depending on your needs.

Ex 1 : Studies

Ex 2 : Works

Ex 3 : Network

Logical Framework

The Logical Framework Matrix (logframe) [\[see tool 3\]](#) is a visual project planning and management tool to check the objectives, results, actions and resources of the project. It also allows for the development of hypotheses to anticipate external risks that may affect the project. It is a tool used to visualize the project construction process.

The information from the concept note can then be used as a base to complete the logical framework, which states:

- The strategic objective/purpose of the project
- Specific objectives (usually between 3 and 5)
- For each specific objective:
 - Activities
 - Results
 - Indicators
 - Deliverables
 - Impacts (which may be delayed or immediate)



Entela PINGULI (National Coastline Agency, Albania): «The logical framework is the key to a successful project because it highlights the logic involved, which is therefore shareable and understandable by all».



David DE MONBRISON (BRL ingénierie, France): «The logical framework approach is more appropriate for «large» projects. For small NGOs or inexperienced individuals, this tool can be difficult to manage. All that is needed is a clear definition of the logic followed for the targeted objectives, a description of the expected results and the means to achieve them, and at the same time an indication of how the structure will monitor the results».

[**TOOL 3**]

Logical framework template (example)

OBJECTIVES	SOUS-COMPOSANTES	ACTIVITIES	RESULTS	DELIVERABLES	INDICATORS	DELAYED OR IMMEDIATE IMPACTS
Strategic objective	.....	.....	.....	.....	.....	.....
Specific objective 1	Sub-component 1 :	Activity 1.1 : ..... .....	.....	.....	.....	.....
		Activity 1.12 : ..... .....	.....	.....	.....	.....
		Activity 1.3 : ..... .....	.....	.....	.....	.....
	Sub-component 2 : ..... .....	.....	.....	.....	.....	.....
	Sub-component 3 : ..... .....	.....	.....	.....	.....	.....
Specific objective 2	<i>Idem</i>					
Specific objective 3	<i>Idem</i>					

PLAN A SUFFICIENTLY FLEXIBLE ACTION PLAN:

The duration of the project

Calls for proposals generally regulate the maximum duration of your project. This period varies according to the donor. It can be 12 months, 36 months or more. It is up to you to include your operation within this period.

Once validated by the donor, your project will be marked by a start date and an end date. It will constitute the eligibility period of your operation, your actions and your expenses.

Be attentive to this when building your operation and allow enough time and a realistic programme of activities to succeed in carrying out your actions easily and on time.

In the implementation phase, a lot of unforeseen events can disrupt and hinder your project. Be prepared.





Fabrice BERNARD (Conservatoire du littoral, France):

«While some donors provide for the eligibility of expenses related to the development of the project (drafting phase), others may agree to cover expenses directly related to the implementation of the project from the beginning of the submission phase... it is important to keep proof of costs from the start of the drafting phase.

Furthermore, with regard to the duration of the project, do not forget to include administrative authorisation phases which can be long and restrictive, periods of negotiation or more generally of «good governance» between partners and stakeholders...a project may not be plain sailing all the way, there can be ups and downs too».



The organisation of activities over time

It is during the drafting of your application that you must review and adapt the action plan that you had prepared in the preliminary draft.

This involves determining a timeline for carrying out each project activity and for producing and exploiting each of their results.

Create a provisional schedule or Gantt chart [see Tool 4] for the duration of the project.



Marianne LANG ((MedPAN, France):

«The little extra that reassures the financial partner is if they see that the applicant does not stop with the duration of the project, and that they have thought beyond this to post-project. It is also appreciable when projects refer to good practices carried out by other project promoters. In our calls for small projects, we can therefore award a «bonus point» to applicants who capitalise on the experiences of the network or who bring an added value to the network».

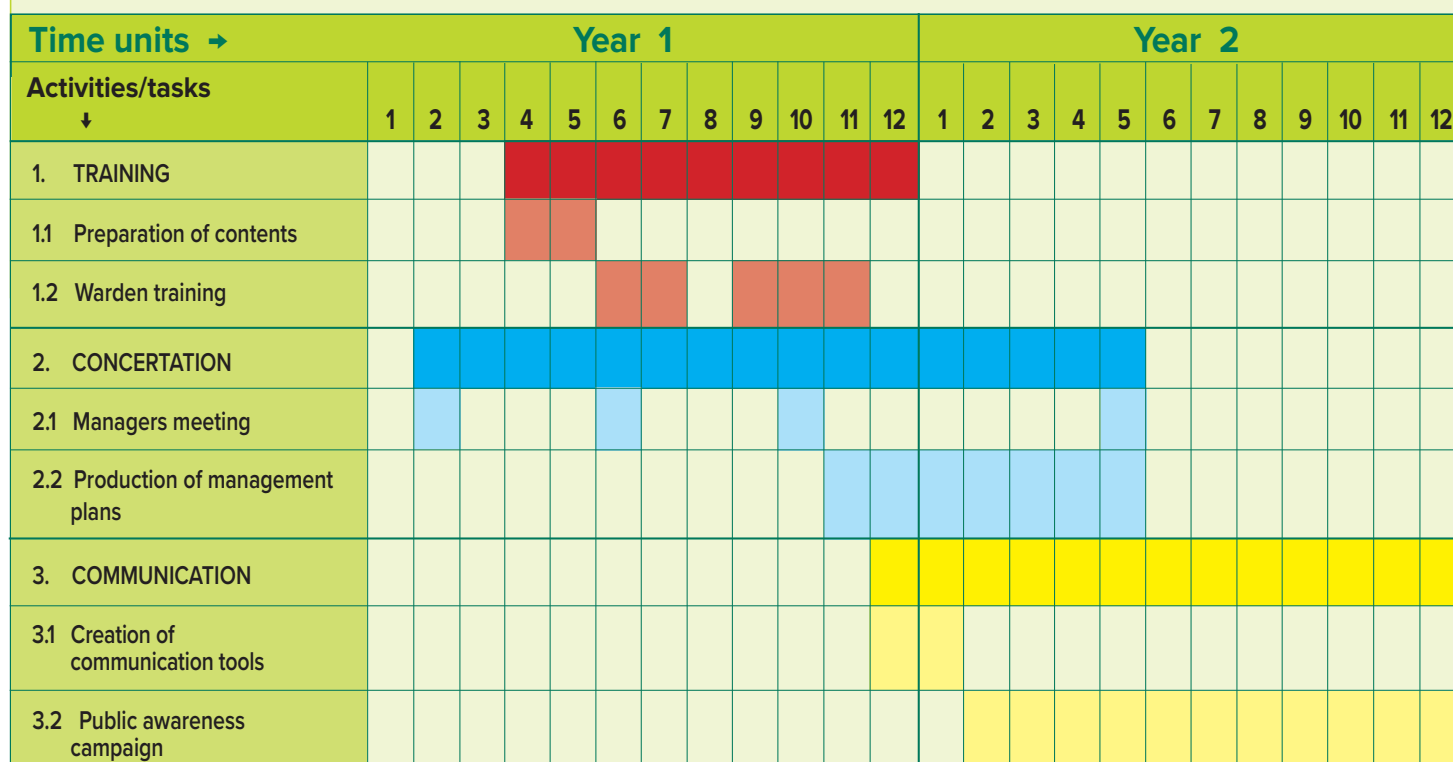
Elodie RANDRIANARIANARIJAONA (RIT CEPF, Tany Meva Foundation, Madagascar): «At CEPF, we believe that a good project is based on a strategy of sustainability and perpetuation of activities, so that the action continues beyond the duration of the project. Another positive aspect is its originality, the strong ownership of all stakeholders in the project, and its realism»



[**TOOL 4**]

**The Action Plan
or Gantt Chart**

The Gantt chart, commonly used in project management, is one of the most effective tools for visually representing the different activities (tasks) that make up a project.



The left-hand column of the chart lists all the tasks to be performed, while the header row represents the most appropriate time units for the project (weeks, months, year, etc.).

Each task is represented by a horizontal bar, the position and length of which represent the start date, duration and end date.

Consequently, this diagram displays the following at a glance:

- The different tasks to be considered
- The start and end date of each task
- The expected duration of each task
- The possible overlap of tasks, and the duration of this overlap
- The start date and end date of the project as a whole

Essentially, a Gantt chart lists all the tasks that need to be accomplished to complete the project and indicate the date on which these tasks must be completed (the schedule).



2. THE PROVISIONAL BUDGET

The projected expenses must be incurred in order to receive the full anticipated funding.

Assess your budget items realistically to give you the means to achieve your ambitions.

Refer to the Call for Projects/Applicant's Guide/Financial Handbook published by the donor for the categories of eligible expenses and the rules for their coverage.

DIRECT EXPENDITURE

These are the expenses that are directly related to your project. They are the subject of accounting documents specific to your operation.

Personnel costs:

Identify the employees assigned to the operation, their status, their working time implications and their levels of gross compensation charged (what they cost the employer).

In the event of a multi-partner project, this data must be collected quickly from your partners.

Travel costs:

Plan the number of journeys your operation will involve.

Estimate the number of journeys and the means of transport you will use (car, bus, train, plane). In general, a distinction is made between local and international travel, as the methods of payment are not always the same.

For international travel, visa costs, travel insurance and transport to and from the airport can usually be included in this expense category.

For projects that take place over several years, it is difficult to predict the cost of an air or train ticket. It is up to you to determine an average price and to plan a reasonable amount to cover the costs incurred during the project.

Living costs:

They typically include accommodation, meals and local transportation while you are on assignment for the project.

Numerous donors offer limits or scales for this category of expenditure adapted to the cost of living in the country of destination.

To cover these expenses during the project, you will need to follow the procedures indicated by the donor, and check whether they are in line with your organisation's practices (flat-rate or actual costs).

External services:

These are goods and services provided for the project by a service provider external to your organisation and partnership.

It often includes expenses related to:

- communication (graphics, website);
- training (trainers, experts);
- translation and interpreting (common for international projects)
- studies (scientific and technical expertise, management plans, ...) and works (architect, experts, building companies;
- etc.

For capital and investment expenditure (works, equipment), it is common practice that only the value of the depreciation is taken into account during the project lifespan.

For any provision of goods or services, you will often be asked to submit to a competitive bidding process in order to avoid any conflict of interest and to ensure the fair use of public funds.

Therefore, you must know and respect the rules set by your donor.

For the provision of services, some donors impose a procedure based on the planned expenditure threshold. It is essential to keep all documents and evidence related to the competitive bidding process.

INDIRECT EXPENSES

They correspond to a share of overheads that are not distinctly and entirely related to the operation. Therefore, as opposed to direct expenses, indirect expenses are not or cannot be directly related to the project, while still necessary for its implementation.

Example of indirect expenses:

- Operating expenses common to the entire structure such as electricity, telephone, maintenance, rent and small office supplies.
- Employees carrying out so-called «support» functions (secretarial, accounting, etc.): as a rule, the expenditure generated by these persons concerns all the activities of the organisation and not just the operation co-financed by the donor.

They are, in general, ineligible or flat-rate according to a ratio based on direct expenditure (excluding subcontracting expenditure).



Elodie RANDRIANARIJAONA

(RIT CEPF, Tany Meva Foundation, Madagascar):

«It is important to note that donors make their own assessment based on established benchmarks. For example: in the financial analysis of the project there is a standard for the cost per hectare of mangrove reforestation in Madagascar. These benchmarks are established following the building of experience. The information is not communicated to the applicants; it is up to them to estimate as closely as possible the cost of their actions and it is a good way for CEPF to verify the good management and good governance of the applicants».

Céline DAMERY (Conservatoire du littoral, France):

«For organisations that may not have experience, it could be worthwhile to include a budget line to solicit a firm that specialise in the start-up and early key stages of the project. It could help for better understanding of the donor procedures, to develop the monitoring toolkit to be used throughout the project, and to identify the approaches to be developed in relation to the usual practices of our organisation».

IN GENERAL, THE PITFALLS TO BE AVOIDED

- Disregarding the donor's expectations and evaluation criteria;
- Submitting a proposal that is outside your core area of expertise and/or not providing sufficient staff for its execution;
- Overestimating your potential by letting people think you're going to do EVERYTHING for a moderate budget. Be realistic if you want to be credible;
- Matching the content of your request with the requested budget;
- Not paying enough attention to the quality of the presentation;
- Waiting until the last minute to contact the donor or partners if necessary;
- Failure to take into account the deadline for submission or the need to only use electronic submission



«**Elodie RANDRIANARIANARIJAONA** (RIT CEPF, Tany Meva Foundation, Madagascar): «No flexibility in the way the file has been compiled! If the donor requires a framework, it is imperative to follow it, otherwise the file will not be eligible and will immediately be rejected. At RIT CEPF, we systematically check the admissibility of the project, i.e. we check whether the file with the documents (administrative, technical, financial) sent is complete. If the project is admissible, there may be CEPF support during the eligibility phase. We then study the eligibility of the submitted project in relation to the various criteria established in the call for proposals. The feasibility stage follows, consisting of a more in-depth study of the technical and financial aspects of the project. CEPF has developed a list of tools that each applicant must complete in the application process. We provide support for the handling of tools during the information meeting, but we also remain available by email or telephone».

Marianne LANG (MedPAN, France):

For MedPAN calls for small projects, a first selection is made when the files are received. The regulations must be carefully read before responding to the call for proposals as those that do not meet the eligibility criteria are immediately rejected. A concept note is first requested to pre-select candidates. In this way, we can communicate with them and guide them in the development of the file, which is much more detailed than the concept note».

3. THE ADMINISTRATIVE FILES

Ensure that all required administrative documents are collected.

Be sure to anticipate if any of them need to be signed by the legal representative of your structure.



Fabrice BERNARD (Conservatoire du littoral, France):

«If a grant applicant is unable to follow the terms and conditions of a call for proposals in either form or criteria... they will likely be equally unable to properly implement and monitor a project according to the standards and requirements of the donor».

IN CASE OF MULTI-PARTNER COOPERATION PROJECTS:

- The role of the Lead Partner is fundamental in the set-up phase, but also later on in the execution phase and to ensure links with the donor. The latter will look at the previous experience, the necessary support (human, administrative, financial), and the stability of the Lead Partner institution.
- It is important to choose your partners carefully: active, responsive to the project leader's requests, technical and linguistic skills, involved from the very beginning of the project preparation, network, committed and motivated beyond the funding alone...
- It is necessary to establish a balanced and effective partnership (active cooperation, balanced contribution of roles and funding, clear and democratic rules for decision-making defined upstream, geographical balance...)
- During the project set-up phase, physical or virtual technical meetings with all partners are essential to:
 - Clarify the role of each organisation (in particular the lead partner - beneficiary partners - associated partners)
 - Share the project vision, deliverables and timelines
 - Define the distribution of activities and the associated budget
 - Have the same level of information relating to the administrative burden linked to the management of the project (expenditure feedback, activity report, etc.)
 - Take stock of the outstanding missing administrative documents
- It is important to allow sufficient time for all partners to proofread the application and provide the requested documentation!
- In order to thoroughly test the commitment and the real involvement of the partners, a physical meeting at the end of the project is an important point that often conditions the success of a multi-partner project.



Jeremie DUBOIS (Var Department, France): To set up an international partnership project, you need to surround yourself with partners who are in the same situation or who are complementary in terms of experience and skills. To answer calls for projects, it is sometimes compulsory to have a partnership and finding a partnership can take up to 6 months, or even a year! Monitoring calls for projects is a first solution, and it is therefore necessary to anticipate the set-up phase because it is very time-consuming. It takes time for a leader to emerge, share needs and vocabulary, define the target, deliverables, etc. There is therefore room for misunderstandings, especially if it involves cooperation between countries with different languages or cultures».



Noëlle TASSY (Cabinet CDI, Consulting Firm, France): «It is the Lead Partner's responsibility to coordinate project engineering, from the drafting and implementation phases to the final report. Submitting a successful application on time is a challenge in itself. There is a lot of work to be done in terms of writing, style, harmonization of proofreading vocabulary of synthetic characters, etc. To ensure that a successful application is submitted, allow plenty of time for dialogue, either with the entire partnership or on a joint basis».





Sebastien LECCIA (Corsican Environment Office, France)

«The risk involved in developing an international partnership project is that you might always work with the same partners, which is contrary to European projects where the aim is to facilitate the exchange of experience. Therefore, you need to «vary» your partners. However, it is surprising how some partners seem really motivated at the beginning and then you may never see them again. It is important to have a good and dynamic network and to have reliable partners».



Elodie DOZE (consultant, France): «In multi-partner cooperation projects, the difference in involvement of all parties can be a concern.

I have had experience of projects with more than 10 partners, some of which had badly calibrated their project from the outset, in particular in terms of estimating the number of staff required. As a result, they did not come to any meetings and the work had not started when we were supposed to have achieved 80% of what we had planned for the 1st year. If a partner fails to increase expenditure, the whole Partnership loses credibility in relation to the Donor, who may decide to grant less financial support than the initial budget... For this reason, it is essential that the Lead Partner defines the number of meetings that will take place (and provide each partner with a sufficient budget for travel) and confirms this with the Partnership. The Lead Partner must also make sure that each partner will have the necessary human resources to be involved in the whole project, in order to avoid any difficult situation».



Sylvain PETIT (SMILO Association, France):

«The drafting of a project is sometimes conducted in a language that is not fully understood by the whole partnership. The Lead Partner must therefore have a team that speaks as many languages as possible, to make sure that everyone understands each other in the activities and deliverables that each will have to carry out.

If the Lead Partner already foresees difficulties in the set-up phase, one solution is to provide a budget for interpretation services for the project steering committees».






**Mathieu THEVENET** (PIM Initiative France):

«There is nothing like a physical meeting with all the partners during the setting up of the project to meet and get to know each other, and above all so that everyone understands each other's needs, to see that the activities proposed by a partner are in line with the overall direction of the project, and identify possible synergies with their own actions».

**Pierre BOISSERY** (French Water Agency RMC):

«We sometimes receive grant applications submitted by multiple associations. Sometimes, these associations genuinely share the same desire to collaborate on a project with common and shared objectives. And sometimes it is a grouping of «competing» NGOs for the posting, with in reality a merging of several individual projects, and where the global project loses its significance. Ultimately, these projects are often a source of problems, linked to the good positioning of each other, and from the outside, it is difficult to know «who does what». This is why at the Agency we ask that only one organisation be the project leader/reference for the partnership, and we ask for a sort of agreement or memorandum of understanding to be drawn up as soon as the application is submitted, setting out the precise obligations of each party and the terms and conditions of meetings and dialogue, as well as the financial terms and conditions (procedures for the payment of funding to both parties). If these «rules of the game» are not defined from the outset, it is highly likely that the project will not succeed with all the ambition stated at the time of its submission».



Your application is complete

The provisional budget is closed

All the administrative documents are attached to your file

The legal representative of your organisation
has signed the application

You have respected the deadline
to submit your application

You can officially submit your application
to the department that will process your file

Please take note of the deadlines for the examination
and evaluation of your application

Receive the acknowledgement of receipt of your file



Congratulations!

Your project is accepted

The donor suggests
some modifications

You sign your grant contract

You start the project on the date
specified in the contract

Your project is rejected

Receive your assessment

You prepare a new application
taking into account the
assessment or submit a variation
of this project to another donor



Nathalie DAUBIGEON (Conservatoire du littoral, France): «For European projects the Managing Authority sometimes requests that we reduce our budget by X%. Rather than reducing the amount of each budget line (which would mean that we overestimated our initial budget), it seemed preferable to us to withdraw certain activities from the project and to find a solution to have them financed differently».

Céline DAMERY (Conservatoire du littoral, France):

«When a project is turned down, obviously there is a lot of disappointment, frustration and a sense of failure. But you have to know how to overcome this, and if possible, get in touch with the donor to find out more about the reasons. If the project has been badly put together, you have to admit this, and keep in mind the weaknesses identified in the editing so as not to make the same mistakes again (in terms of content or work methodology). But it is also sometimes the case that the project was not selected, despite its quality, because other projects were judged better. In this case, after a few adjustments, and if appropriate, it can be resubmitted to the same donor, or even changed to be offered to another donor. In any case, you should not give up, take a step back and keep your self-confidence for the future».

Pierre BOISSERY (French Water Agency RMC):

«In order to carry out a project, several projects are often necessary. The failure of a project is not an end in itself... You have to acknowledge from the very beginning of its design that it will not succeed and learn from it for the next project».





PHASE 3 | EXECUTE THE PROJECT

STAGE 6

SIGN THE CONTRACT OR THE AGREEMENT ; UNDERSTAND AND SHARE THE COMMITMENTS; BUILD AND SHARE MONITORING TOOLS

CONTRACT OR AGREEMENT SIGNATURE

Contract signature/agreement with the donor. It is the main document in your operation, and governs your project and the partnership throughout its duration.

In general, the Contract indicates:

- the identification number of your project/contract/agreement for the donor;
- the start and end dates of the project;
- the grant amount you have been awarded;
- the terms and conditions of the grant award;
- the account number to which the grant will be paid (be aware that many donors request specific accounts dedicated to their project);
- the name and contact information of issuing department;
- the names and contact information of the beneficiary and project partners;
- the methods and periods for the submission of interim and final reports (administrative and financial statements);
- the list of supporting documents to complete your contract.

In addition to this contract, your *Application File*, your *Provisional budget*, the *Action schedule* that you have developed and the *Administrative and Financial Regulations* of the programme to which you have committed yourself, are attached to this contract.

→ **READ ALL OF THESE DOCUMENTS AND DON'T FORGET TO CHECK:**

- the start and end dates of the project;
- the grant amount you have been awarded;
- the terms and conditions of the grant award;
- the methods and periods for the submission of interim and final reports (administrative and financial statements);

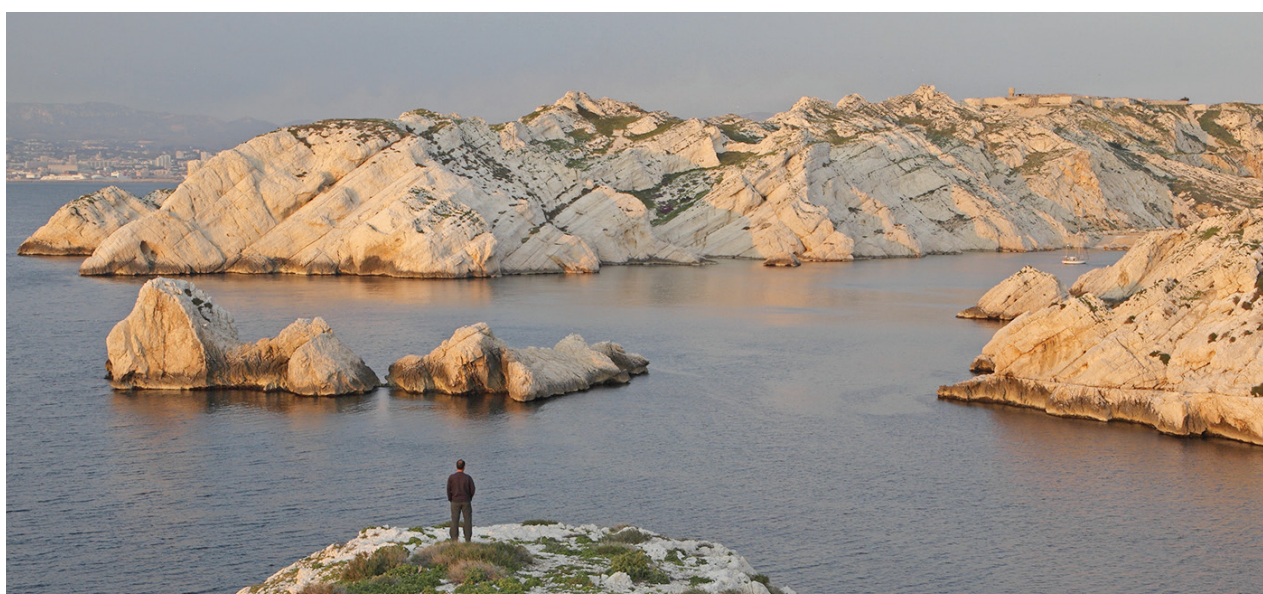
→ **SHARE THEM WITH YOUR TEAMS AND PARTNERS**

→ **CREATE THE FOLDER / SHELF FOR YOUR OPERATION**

→ **STORE THEM** (as with all original items in the project, generally to be kept at least 5 years after the end of the project).



David DE MONBRISON (BRL ingénierie, France): «After signing the contract, be sure to maintain the link with your financial partner and keep them regularly informed of the project's progress (even if not requested to do so), inform them of your difficulties and problems, and keep them informed of your successes and marketing operations».



Marianne LANG (MedPAN, France):

«Whatever the issue, it is essential to establish contact with the financial partner whose role is to assist and guide project leaders, there is no such thing as a silly question. What would be silly is to charge blindly in without a solid base».

UNDERSTAND AND SHARE YOUR COMMITMENTS

The Application Form that you submitted to the donor represents the project that you must carry out. It binds you through the contract that you signed with the donor.

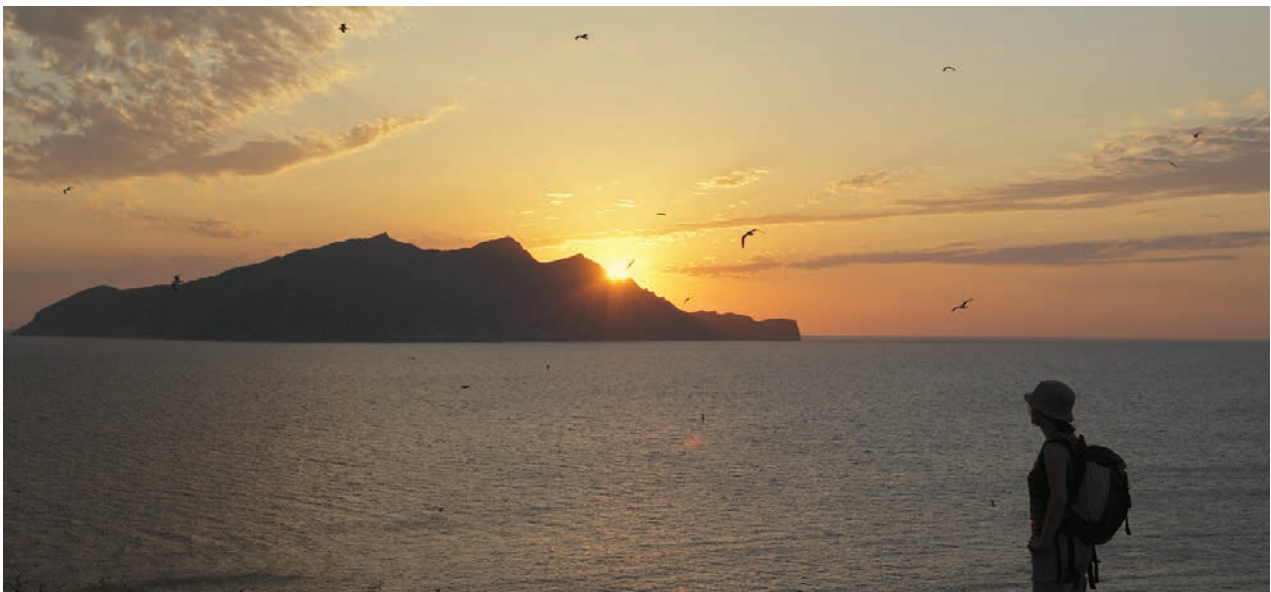
In order to ensure correct appropriation of the contractual elements and obligations inherent to your operation, it is necessary to organise all project stakeholders (project team, partners, etc.) in order to build a shared vision of the future work plan.

Now is the time to reconnect with your partners and re-mobilise your teams, by organising a «Kick off meeting».

Organise a remote or physical meeting as quickly as possible.

Several months may pass between the submission of the project and the signing of the contract with the donor. Prepare an Agenda [\[see Tool 5\]](#) that will allow you to collectively review the project and its contractual requirements.

If applicable, and if it has not already been requested, take care to draw up **an agreement for your partners** that includes the elements of your contract with the donor. It will bind you to them until the end of the project.



Fabrice BERNARD (Conservatoire du littoral, France):

«Be sure to highlight each key stage of the project and communicate (social networks, press, report with photos to your donors...), in particular when signing agreements with your partners in order to feature all the stakeholders and give them a place/responsibility in the implementation of the project».

[**TOOL 5**]

Agenda kick-off meeting

The agenda for this kick-off meeting may be as follows:

Agenda - Project X Kick-off Meeting

Date :

Time :

Location :

Participants conviés :

1. Introductory message
2. Presentation of the project validated by the donor (amount, results, activities, deliverables)
3. Presentation of the content of the contract signed with the donor
4. Presentation of the Partnership Agreement to be signed
5. Presentation of the initial project schedule and discussions on reprogramming requirements
6. Identification of all personnel involved in the operation
7. Distribution of roles and tasks within the project team
8. Submission of a decision statement

Comment:

- Depending on the number of people, a round table discussion can be held at the beginning of the meeting
- The appointment of a secretary (in charge of drafting the minutes) can be made at the beginning of the meeting



BUILD YOUR PROJECT GUIDE

It is the collection of the key elements of your operation. Structure it to make it as operational as possible.

It is used to compile the rules and expectations of your operation in a document shared by all the partners, technicians, companies, elected officials, etc. involved in the project. You will share it with everyone involved in the implementation of the project activities.

To complete it:

- Collect the contractual documents (contracts and appendices, standard documents...)
- Define your internal procedures (types of receipts to be collected for expenses and activities, Governance, transport expense management, validation and signature cycles...)
- Choose your internal communication tools (telephone, mailing, video conference, cloud, intranet, etc.)
- Determine the graphic identity of your project and your communication and development plan (important and often mandatory to develop the funding)

For example, the summary of your Project Guide could be as follows:

1. The projet: the dates and periods, the programme and operation objectives; the results expected to be achieved; the activity description sheets (WP); the project action plan; the feedback and reporting frequency, etc.
2. The partnership and the governance of the project: the project's operational organisation chart (steering committee, technical committee); decision-making procedures, contact details of the key people in the partnership and project; ...
3. The budget and accounting elements: the provisional budget breakdown by partner and by activity; the payment schedule and summary of payments to partners; the expenditure commitment rules; the intermediate and final financial return schedule; the description of expenditure supporting documents;
4. The relationship with the Planning department, Procedures and Archiving: Planning department contact information and contact person; rules for reports to be submitted; procurement and contract rules; terms and conditions for contract amendments; rules for archiving and provision of supporting documents
5. Project communication and donor support: best practices in communication; specific obligations linked to the Contract; the graphic charter of the project and the mentions to be included; etc.
6. Appendices: models of employee timesheets; personnel expense declaration form; signing-in sheet; mission expenses, etc.



Céline DAMERY (Conservatoire du littoral, France): «When different branches or different departments of our organisation (public procurement department, accounting agency, human resources, ...) are involved in the project, it is important to inform them at the very beginning of the project of the types of supporting documents (technical or financial) that must be produced to illustrate that the actions have been implemented, as well as the schedule for administrative and financial reports.

Clarifying the roles of each person and scheduling the collection of these supporting documents is extremely helpful to avoid doing so at the last minute, when you or your colleagues might have your «nose to the grindstone».

Monitoring tools required for the project:

These tools are essential for steering (administrative, technical and financial) the project.

Some documents will allow you to report on the activities carried out (signing-in sheet - see tool 6 - time sheet for employees - see tool 7 - staff expenses declaration form; mission expenses sheet, meeting minutes...).

To simplify their collection and make sure that all stakeholders use them, prepare standard templates (unless they are imposed by the donor).

Don't forget to put the logos of your donor and your project (and in some cases these references - number, convention code...) on each of them so that all the beneficiaries of your operation are informed of the financial support provided by your donor.

THE PROJECT PROCEDURES MANUAL

This Manual will make it possible to synthesize, frame and clearly share the practices of its organization while integrating the requirements of the donor. It will be based on the practices already in place and make them change, or will formalize them if they do not exist. It includes in particular:

- a description of his organization's travel policy: circuits for signing mission orders, reimbursement procedures for mission expenses in the country and for missions abroad (flat rate / per diem or real expenses), the methods of covering transport costs, the list of supporting documents to keep, etc.

- tender procedures, which include:

- the definition of procedures according to the estimated amount of the service (services and supplies / works), integrating the obligations of upstream dissemination and competitive tendering according to the thresholds, indicating the validation circuits (project manager, director, president, bonor, Executive Board, etc.) of the selected offers, ...

- information to be mentioned in calls for tenders: content of the service; scoring / evaluation system; documents and documents to be provided in tenders; date, time and method of submitting applications, ...

- the various validation or decision-making procedures for the various subjects: technical, communication, etc.

This manual may also include standard documents that will be used during the project: mission orders, expense report or reimbursement request forms, specifications or consultation e-mail, table and analysis report of offers, contract models, timesheets, etc.

[**TOOL 6**]

Sign-in sheet

The sign-in sheet is used to justify the presence of staff assigned to the project and potential partners at training, meetings or workshops. It must include the project name and the organiser and funder logos.

<i>[ORGANISERS LOGO]</i>	<i>[project logo]</i>	<i>[FUNDERS LOGO]</i>					
MEETING NAME							
Date :							
Time :	Location :						
Name	First name	Organisation	E-mail	Day 1 morning	Day 1 afternoon	Day 2 morning	Day 2 afternoon
				signature	signature	signature	signature
				signature	signature	signature	signature
				signature	signature	signature	signature
				signature	signature	signature	signature
				signature	signature	signature	signature
				signature	signature	signature	signature
				signature	signature	signature	signature



Individual timesheet summary template for project

« **Project Reference:** »
Programme

Insert de project logo or the logo of the organization *Insert de programme logo*

Organization: _____
 Name and first name of the employee : _____
 Staff category: _____
 Number of working days per year: _____
 Number of working days per week: _____
 Number of daily working hours (legal basis): _____
 Year: _____

Timesheet: Mr-XXX	January	February	March	April	May	June	July	August	September	October	November	December	Total (in days) ²
WP 1													0,00
WP 2													0,00
WP 3													0,00
WP 4													0,00
WP 5													0,00
WP 6													0,00
WP 7													0,00
TOTAL (in days)²	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00

¹ Please use the following reference numbers: 1 Manager ; 2 Researcher teacher and/or trainer ; 3 Technical ; 4 Administrative

² Time unit to use: day in increments of 0,25 d, 0,5 d, 0,75 d or full day

Be careful ! When recording working times, please make sure to mention only integers

Date et signature of the employee	Name, surname of the legal representative Date et signature
-----------------------------------	--

STAGE 7

CARRY OUT THE ACTIONS, ALLOCATE THE BUDGET AND MOBILISE THE TEAMS AND PARTNERS

CARRY OUT THE ACTIONS AND ALLOCATE THE BUDGET

- Your Contract is signed with the Donor.
- Partnership Agreements are signed with each of your partners.
- Your Project Guide is validated and the main monitoring tools are ready.
- The first partnership meeting has taken place (Kick off meeting)

You can get to the heart of the matter and launch your actions in the field, but first make sure you have a precise overview of the situation before the start of the project (baseline) to be able to compare the situation before and after the project.

You can commit to expenses and actions in accordance to your budget and provisional schedule and procedures (contracting, modality of payment of travel and accommodation expenses, selection of candidates for training courses, etc..).



Jean-François CHEVALIER (Conservatoire du littoral, France): «If there is too large a discrepancy between the expenses initially reported and the actual expenses, it may result in penalties or fines. Penalties can also concern the nature of the expenses, if they are too different from what was announced and too far-removed from the project»

It is important to conduct regular progress reviews with your project's stakeholders (partners, employees, beneficiaries, etc.).

- Collect supporting documents for your project's expenses and outcomes as you proceed (payslip, work contract, invoices, studies, etc.)
- Draft and transmit your interim reports and organise your partnership

PROJECT MONITORING: TASK-BASED MANAGEMENT

To manage the implementation of your operation, and to ensure adherence to the contract with your donor, there are a number of key points of vigilance to be implemented throughout the project. Monitoring allows you to respond to your project with flexibility (planning with possible readjustments) and to check that everything is going as planned.

You must ensure the correct accomplishment:

- of your activities
- of the execution of your budget
- in compliance with administrative procedures
- to achieve the expected results

The tools that helped you draw up your application (Action Plan, Action Sheet or Work-Package, Logical Framework, Provisional Budget, etc.) will also help you implement your project.

ADAPT AND UPDATE YOUR TOOLS TO MANAGE YOUR OPERATION

→ **Activity management:**

- Updating the action plan by setting the dates fixed during your steering meetings, by checking off the activities carried out, and by updating them according to your progress.

Time units →	Year 1												Year 2											
Activities/tasks ↓	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
1. TRAINING				■	■	■	■	■	■	■	■	■												
1.1 Preparation of contents				■	■																			
1.2 Warden training						■	■		■	■	■													
2. CONCERTATION		■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■							
2.1 Managers meeting		■				■				■							■							
2.2 Production of management plans										■	■	■	■	■	■	■	■							
3. COMMUNICATION													■	■	■	■	■	■	■	■	■	■	■	■
3.1 Creation of communication tools													■	■										
3.2 Public awareness campaign															■	■	■	■	■	■	■	■	■	■

- Specify your **descriptive sheets for each activity (Work-Package)**, by designating the persons responsible for it, by determining their schedule, by specifying the actions carried out, the results obtained and outlining upcoming results.

→ **Financial management:**

Provide regular updates on the status of expenditures by partner and by activity (monthly, semi-annually, annually, etc.)

- Collect, confirm, scan and file receipts for expenses as they occur (Competitive bidding, quotes and invoices for subcontractors, Summary of Mission Expenses, boarding passes, accommodation invoice, Summary of time worked on the operation and associated pay slips, etc.)
- Complete the Interim Financial Reports and present them at each Steering Committee meeting

Note: depending on the requirements of the donor, the project reference (title, project code, etc.) must be included in the expenditure supporting documents. A specific accounting system (project account or analytical code dedicated to the project) must be put in place to ensure tracking of expenses on project credits. This should be discussed and validated internally before the project starts.

Contract n°	<i>Name of the project</i>
Year .. - from .././... to .././....	
Categories of expenditures	Total for each category
1. Human resources	0,00 €
2 Per diem (mission expenses)	0,00 €
3. Travel	0,00 €
4. Equipements and furnitures	0,00 €
5. Other services	0,00 €
6. Other (subcontracts)	0,00 €
Running total of declared expenditures	0,00 €
Administrative costs (max 7%)	0,00 €
Total expenses	0,00 €

	A	B	C	D	E	F	G	H	I	J	K
1	Category 1. Human resources - Period : Year .. - .././20. to .././20.										
2	Expenses	Partners	Employee /occupation	Period (month)	Nb of month	Monthly salary	Amount in local currency	Currency	Conversion	Type of doc.	Amount in €
3	1,1						0,00				0,00
4	1,2						0,00				0,00
5	1,3						0,00				0,00
6	1,4						0,00				0,00
7	1,5						0,00				0,00
8	1,6						0,00				0,00
9	1,7						0,00				0,00
10	1,8						0,00				0,00
11	1,9						0,00				0,00
12	1,10						0,00				0,00
30	Total 1. Human resources										0,00
40											

	A	B	C	D	E	F	G	H	K	
1	Category 6. Others (subcontracting) - Period Year ... - .././20. to .././20.									
2	Expenses	Partners	Topic - service provider - date	Amount	Currency	Conversion	Date	Type of document	Amount in €	
3	6,1								0,00	
4	6,2								0,00	
5	6,3								0,00	
6	6,4								0,00	
7	6,5								0,00	
8	6,6								0,00	
9	6,7								0,00	
10	6,8								0,00	
11	6,9								0,00	
12	6,10								0,00	
19	Total 6. Others (subcontracting)									0,00



Georges BOULOS (MedPAN, France):

«As a financial manager in an association, you must be very well organised and meticulous, in particular when there are several projects carried out simultaneously with several donors, in particular as each donor has their own requirements and their own procedures. The very first thing you need to do is to have an up-to-date global cash flow plan for the association, on the one hand to determine when there are going to be cash outflow needs, and on the other hand to determine when there is an inflow from donors. This effective financial monitoring is essential to avoid the association being in a negative position! Having a specific account for each project is a good idea for independent management. In any case, a financial monitoring tool specific to each project (by budget line, or by component, depending on the requirements of the donor) is essential in order to anticipate possible requests for budget changes».

Fabrice BERNARD (Conservatoire du littoral, France): In our Europe & International Department, we developed an Excel spreadsheet tool, as a complement to our company's accounting system, to monitor obligations and the payment of expenses for all our projects. Each project has a code, which we apply to the invoicing files. As a result, we have a fairly detailed overview of our expenses throughout the year with a live follow-up».



→ **Administrative management:**

- Design and use one or more checklists based on the items to be collected;
- keep an eye on whatever is missing;
- mobilise the partners and employees involved to provide you with the missing items at each meeting.

Example of checklist

DOCUMENTATION CHECKLIST		PARTNER 1 Year 1				PARTNER 2 Year 1			
CALL FOR TENDERS AND SERVICE PROVIDERS		Present	Absent	Purpo- seless	Comments or remarks	Present	Absent	Purpo- seless	Comments or remarks
Call for tender files, call for proposal, terms of references, instructions of tenderers, and other relative documents									
Quotation									
FINANCIAL MANAGEMENT AND BANK DOCUMENTS		Present	Absent	Purpo- seless	Comments or remarks	Present	Absent	Purpo- seless	Comments or remarks
Official Bank statements mentioning expenses and incomes									
Cashbook and receipts									
PAYMENT DOCUMENTS		Present	Absent	Purpo- seless	Comments or remarks	Present	Absent	Purpo- seless	Comments or remarks
Payment requests from the service provider or partner and invoice									
Bank statement, mentioning the beneficiary, the account number and amount paid									
Copy of signed cheque (in case of payment by cheque)									
STAFF COSTS		Present	Absent	Purpo- seless	Comments or remarks	Present	Absent	Purpo- seless	Comments or remarks
Staff register, with list of employees and personal data (civil status, occupation, ...)									
Signed employment contracts and their amendments									
Timesheets and payment sheets (established for internal and fiscal purposes)									
Copies of declarations to the competent authorities regarding social contributions									
Proofs of payment of net salaries to the employees									
MISSION AND TRAVEL EXPENSES		Present	Absent	Purpo- seless	Comments or remarks	Present	Absent	Purpo- seless	Comments or remarks
Mission order, signed by the relevant Authority, with mention of date and la location of the mission and employee concerned									
Mission report approved									
Expense report approved									
Transport invoice									
Receipt or ticket for each mean of transport used									
Hotel invoice and invoices/receipts for other expenses related to the mission									
Signed list of participants (meetings, trainings,...)									
OTHERS		Present	Absent	Purpo- seless	Comments or remarks	Present	Absent	Purpo- seless	Comments or remarks
Proof of the respect of european visibility obligation (ex : photos of vehicles with EU logo, buildings with sign mentioning EU and referring to the project...)									

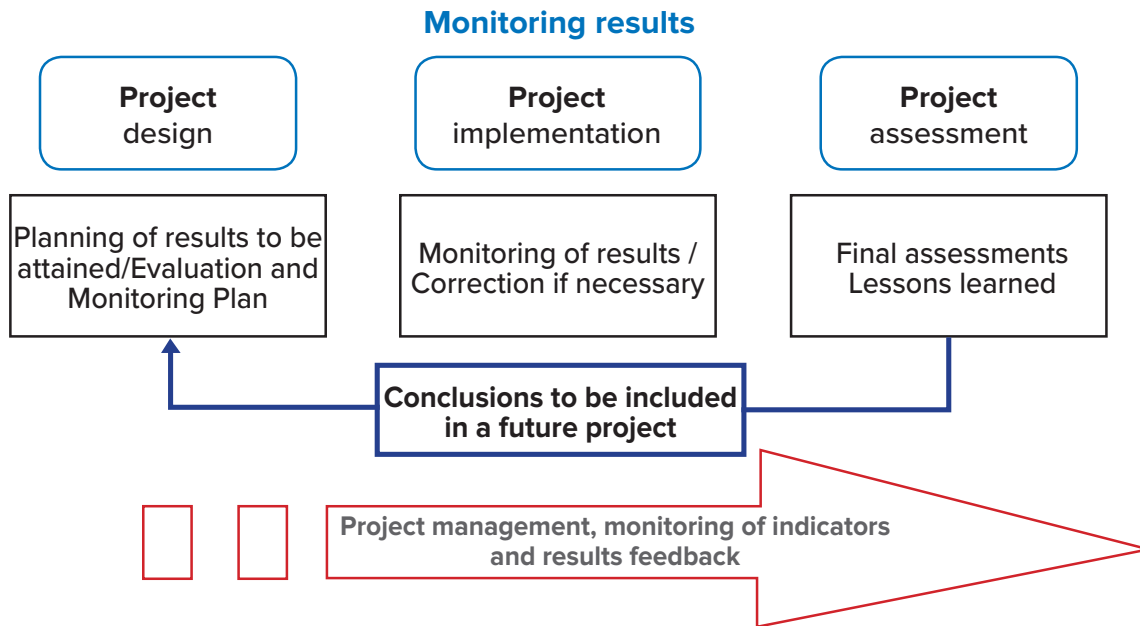
Prepared by : _____ Name, occupation, signature, date

Approved by : _____ Name, occupation, signature, date

→ **Managing results:**

Results monitoring aims to improve management effectiveness by «defining realistic expected results, monitoring progress toward those results, integrating lessons learned into management decisions, and reporting on performance».

The expected results are quantifiable (based on indicators). They are established activity by activity. They take into account the present value of an indicator to set the target to be achieved. They must be technically and financially REALISTIC.



Monitoring of indicators requires the existence of data, so we must:

- Plan the type, sources, and frequency of data collection
- Identify a person responsible for data collection
- Define the procedure for data collection and maintenance of summary files
- Ensure the reliability and quality of the data
- Correctly fill out a table for monitoring performance indicators

TABLE FOR MONITORING OF INDICATORS

Name of the project				
Activity 1				
Indicator	Expected result	Effective result	Means of verification	Risks
Activity 2				
Activity 3				

Monitoring contributes to better results. It enables:

- the analysis of what works well;
- the identification of corrective measures;
- the identification of priorities;
- the strengthening of implementation discipline;
- the allocation of resources according to priorities;
- budget adjustment;
- informing decision makers/donors;
- the design and development of new projects.

Key mistakes to avoid in monitoring

- Poorly defined roles;
- Competing structures;
- Late data, incorrect format, etc.;
- Irrelevant information;
- Non-accessible information;
- Lack of trust;
- Lack of coordination;
- Culture of use and information flow....



FOLLOW PROCEDURES AND COMMUNICATE

There are a number of requirements and procedures that must be complied with when receiving public or private funding. They are generally detailed in the Contract and the Administrative and Financial Procedures Manual of the programme you are applying for, or in the funding body regulations.

Some recurring examples are as follows:

→ **Competitive bidding**

In order to ensure compliance with the principles of transparency and equal treatment, as well as the correct management of public funds, certain purchases must be put out to tender.

Competitive bidding should generally lead to the selection of the «best bid», which does not always mean the cheapest bid, but the best «quality/price ratio»

The terms and conditions for competitive bidding will be set out in the Administrative and Financial Manual. They may vary depending on the donor and the national standards to which your NGO or administration is subject

For any purchase of goods or services every beneficiary should be able to present:

- The documents (e-mails, letters, website posting...) justifying the sending of an invitation to tender or an opening to competition by distribution to several service providers (generally at least three) as well as the specifications or the invitation to tender in question.

- Proposals from service providers/suppliers who responded or their negative feedback.

- A selection grid presenting the previously defined criteria and their respective evaluation weighting for each candidate.

- The emails or letters of positive or negative responses that you will have sent to the various service providers or suppliers who responded to the call for tender/request for quotation.

→ Changes to the project during its implementation

Your project may undergo changes during its implementation, and this is quite normal, in particular in relation to long-term projects subject to unavoidable contextual changes. Any change in the terms and conditions of the grant must be requested in writing to the funding institution planning department, and in general:

- It must be requested in advance;
- It should normally be submitted at least 1 month before the action closing date;
- It must be issued by the Project Leader and/or by the beneficiary's legal representative.

To check the procedure, refer to the Administrative and Financial Procedures Manual of the funding institution you have chosen to work with.

1st case: a request for an amendment must be made using the official documents provided for this purpose. This is generally mandatory for the following amendments:

- Modification of the beneficiary body
- Withdrawal of one or more partners
- New replacement partner(s) joining the project
- Modification of the work schedule
- Change of bank account
- Modification of the project duration
- Modification of the schedule for the submission of reports
- Modification of the budget breakdown

2nd case: a simple written request may be enough, for example in the case of a:

- Change of coordinating body (if still a member of the partnership)
- Change in the person assuming the role of coordinator within the project
- Change of legal representative within the beneficiary organisation
- Budget breakdown adjustment

E.g.: transfer between 2 main budget items not exceeding 10% of the amount of the budget item in question.

→ Advertising/communication requirements

Once your project has been selected, you are now one of the beneficiaries of the public or private grants awarded by a donor in the framework of one of its action programmes.

Through the projects co-financed by this donor, they contribute to the improvement of living conditions in a territory, to the development of an economic or social sector, to the protection of a species, to the preservation of ecological diversity, etc.

Consequently, as the project manager of a project financed by this donor, alongside your partners you become their «ambassador». As you know, your role is essential in promoting the programme developed by your donor to the public and potential beneficiaries in the field.

From now on, you must respect an advertising obligation which will be checked during the operation and at the final control of the execution of your project.

This obligation consists in informing the public, your partners, or also your colleagues of the financial participation of the donor in question

Produce and use common procedures and documents bearing the project and donor logos.

In order to facilitate the justification of your operation in terms of implementation and obligations, from the outset you can **collectively compile the standard documents for your project**. Don't forget to include your **donor and project logos**, so as to quickly identify them in your administration procedure and to ensure that your advertising obligations are respected.

You can collect these key documents from the outset and then regularly, once they have been established, in order to draw up your interim and final execution reports.

Depending on the donor's requirements, the standard documents and procedures that you will share for the project are usually the following:

- Standard models for items justifying the implementation of activities (meeting agendas, sign-in sheet, photos, press review, training evaluation, study, surveys, etc.),
- Annual or half-yearly administrative and financial report (with copies of supporting documents).
- Communication and Valorisation plans respecting the same graphic charter and part of a strategy at project level.
- Standard template for time sheets, staff cost statements; sign-off sheets; refunding of mission fees, beneficiaries' training contract, appraisal form, etc.
- Expenditure feedback and activity report tables (compatible software).
- Procurement procedure for subcontractors,
- Organisation chart, employment contracts and mission statement for the employees involved in each structure,
- Minutes and deliberation for the procedure for payment of mission and travel expenses

Logos and mandatory information

First of all, the advertising obligation implies displaying the logo of the lead donor and other partners that contribute to the success of the project¹ and/or the programme through funding. It is sometimes necessary to include a sentence stating the co-financing on all important or regularly used media throughout a project's life.

Here too, you should refer to your project's contractual documents (Contract, Administrative and Financial Procedures Manual, other specific documents)

Where, for whom and on what media?

Logos and other obligations must appear on all documents used when dealing with your beneficiaries in the project, for example:

- on the sign-in sheet during training or workshops given in the framework of the project;
- on presentation materials during training, workshops, group work, transnational meetings (slide show, invitation, agenda, booklet, etc.)
- on the time sheets that employees fill in when they are assigned to the project;
- on programmes and brochures for activities designed for the general public;
- on the press releases that you send, etc.
- on project deliverables (e.g. guidelines, studies, etc.)
- on a panel or tarpaulin during and after the works

You can display an A3-size poster (or plaque) at the reception desk in your building announcing that your project is financed by the donor. The poster will be displayed in a place that is clearly visible to the public. It can be complemented by placing additional posters in your premises (e.g. in the office in charge of implementing the project, in the office of your organisation's director or CEO).

It may be necessary to display the same logos, emblems and statements on your website as on your printed materials. These elements may appear on the home page if your website is mainly dedicated to the implementation of the co-financed project. If the co-financed project is only one of several projects, you must create a section or page dedicated to it and include the logos, emblems and references.

Assessing your communication

Communication of your project and its activities is often one of the results to be achieved. As with the other expectations of your operation, the results and impact of your project need to be evaluated. Designing brochures, organising events, communicating on social networks or even drafting specific articles on your website cannot be an end in itself.

At the very least, these actions must meet objectives and be linked to results, which must be assessed objectively whether or not they are achieved. This is why it is important to draw up a valorisation plan at the start of the project in order to plan the actions during and after the project [\[see stage 10\]](#)

1/ Either directly financially or by making personnel time and/or materials available.

A good evaluation is:

- 1/ Setting objectives: set the objectives and tangible results you want to achieve for each communication campaign;
- 2/ Plan actions to achieve them;
- 3/ Evaluate the results;

Simple and inexpensive methods exist to assess whether the objectives set for a given communication action have been met. (Number of people trained, public attendance at events for the general public, press review of articles dedicated to the project, number of views, «likes» or clicks on social networks...

The development plan can include:

- The project's opening and closing conferences
- Activities aimed at the general public/awareness campaigns
- Media coverage of events
- Publications resulting from the project
- Website and social network hosting



Régis LEYMARIE (Conservatoire du littoral, France):

«Communication is essential for the visibility of the project and a successful diffusion of its results. Sharing data, experiences and practices is crucial to ensure that information is not lost and to avoid waste (time, money and human effort) if other organisations are not aware of the existing material and apply for funding for similar actions».



COORDINATION AND MANAGEMENT WITH THE STAKEHOLDERS

A grant-funded project usually continues over several years.

It is often added to the recurring and routine activities of a structure. Sometimes, it may then take a back seat to overworked employees or partners and its successful implementation may therefore become more uncertain.

Whether you are the lead partner, coordinator or partner involved in the partnership, your common duty is to ensure that all the stakeholders in the project are properly mobilised throughout its duration.



Nathalie DAUBIGEON (Conservatoire du littoral, France):

«In order to coordinate and manage a project, you need to have the drive and energy. Especially for long-term projects where a general downturn or difficulties in the context can be noticed for one or more partners. The regularity of meetings, conviviality and proximity are all important in order to maintain a constant commitment. It is also important to occasionally invite your Management to take part in a project meeting».



Manel BEN ISMAIL (Notre Grand Bleu Association, Tunisia):

«One of the highlights in successful project management is the identification of our allies and opponents, which is why good communication is needed both internally and with external stakeholders, to bring together all the parties who may be involved in the project and to have a good working environment. At the association, we rely on our members, and we often try to involve students in feasibility studies, which helps to build their capacity and to form a real team!».



Sébastien LECCIA (Corsican Environment Office, France):

«There are a few pitfalls to be avoided during the course of the project, notably the disconnection between the financial and technical departments: someone must bridge the gap, otherwise you risk creating a two-headed monster that cannot progress»

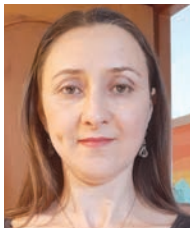


A few tips and tools:**→ Meet regularly:**

The aim is to determine as quickly as possible, the pace and dates of your meetings, bringing together your project team, partners and other stakeholders. Among the recurrent formats for meetings found in transnational projects, the following can be mentioned:

- **the kick-off meeting** with all project stakeholders, which often extends to a presentation of the project to the press, the general public and local stakeholders. The presence of your organisation's governing bodies is an essential point for the shared vision and ownership of this project;
- **team meetings**, at each partner's level, bringing together the employees and volunteers involved in the project to provide regular updates on the progress of activities.
- **coordination meetings** (1 to 2 per year) with project stakeholders (technical and institutional partners, donors, etc.). They are often called Steering Committee when they bring together the heads of the partnership structures. They become Technical Committees when they focus more specifically on the actual achievements of the project.
- The **final meeting** (or Closing Conference) which is used to present the results of the project to the general public, the press and local partners. It is also an opportunity to distribute the results to new audiences, new territories and to imagine a continuation of the project that is coming to an end.

Depending on the requirements, exceptional steering committees can be organised remotely (videoconference, Skype, ...).

**Saba GUELLOUZ**

(Regional Activity Centre for Specially Protected Areas, Tunisia)

«In the case of projects with international partners, and in general, for a successful cooperation project, all parties must be involved on an equal footing where everyone can make contributions to the project at the same time and with the same value. This is more stimulating and prevents the impression that sometimes a partner is imposing «their» project on us».

Fabrice BERNARD

(Conservatoire du littoral, France):

«Sometimes the same pilot site is the subject of several parallel projects, carried out by different partners, whose activities may overlap or be connected, but without there being systematic overall coordination. This is why having one joint committee per year (or two if the subjects are complex), with all project leaders and associated partners working on the same territory, seems to us to be more effective for taking stock, sharing difficulties and shortcomings, and identifying jointly the complementarities and synergies to be put in place for the future and avoiding any redundant work».



→ **Determine the project’s internal communication tools:**

The aim here is to choose and use methods and tools that will enable the teams involved in the project to communicate in a simple and flexible manner throughout the eligibility period of your operation. A partnership project often requires regular interaction within the organisation and between partners, the transmission of documents or the carrying out of collective work at a distance. The simplest tools are often the most effective. Use your practices and habits to determine them (mailing list, Skype meetings, telephone, website, drop box, intranet, videoconferencing, etc.).



Cyrielle GROUARD (Conservatoire du littoral, France) :

«A certain number of digital tools are now available to help you manage and monitor your project. Free or for a fee, these tools all offer certain functionalities (task tracking, calendar, management charts). The presence of other functionalities depends on the software, or on the payable and free options (gantt chart, messaging, kanban board ...). In this case, it is important to identify your needs: how many partners will need to have access to this tool? What are the essential tools you need, and which ones are less necessary for your project? Do you have a budget for the implementation of this digital tool? Once these needs have been identified, you can start looking for the ideal software. The following is a non-exhaustive table presenting some project management software, and their main features. Take the time to compare the software, its features, its price, but also its accessibility. Some software is known to be more complicated to use than others. Choose according to your and your partner’s ability to use digital tools, or the hardware available to everyone. Working on digital tools with partners who do not have the right hardware will not help your project».



2/ Tool providing a global view of the tasks: several columns (to do, in progress, to check, validated...) that you determine, with a limited number of tasks for each one.

	Price	Multi-project	Messaging	Gantt	Multi-access	Others
Projeqtor	Free	X		X	X	Quality management Cost management Kanban Board
Freedcamp	Free	X			X	Kanban Board...
Collabtive	Free	X	X	Option payante	X	File sharing, benchmarks...
Clarizen	Fee-based	X	X	X	X	Cloud-based, financial indicators
Planzone	Fee-based	X	X	X	X	Report export, existing project models, resource management
Wrike	Free or paid version	X	X	X	X	Email/agenda synchronisation; resource tracking; graphical indicators; shared text editor



Céline DAMERY (Conservatoire du littoral, France) :

«In the context of one of our European cooperation projects, the Lead Partner had implemented a sharing platform, so that all partners could have access to documents useful to the whole partnership (project file submitted with budget, partner's logos, photos of the project sites, standard documents to be used for our activities...).

During the course of the project, we used the Smarsheet application to track all the planned activities and deliverables for each partner, to attach the finalised deliverables and to monitor the expenditure incurred by the Partnership. Even if the implementation of the Smarsheet system came late, these 2 complementary tools allowed us to work well and facilitated the collection of documents, especially during the project closure phase. But the ideal solution is to have a single tool, which will be used from the set-up phase, during the project and in the closure phase»





PHASE 4**CARRY OUT REPORTS
AND PREPARE FOR THE CONTROL****STAGE 8**

COLLECT PROOFS OF PROJECT
IMPLEMENTATION;
ASSESS THE IMPACT
AND QUALITY OF THE ACTIONS;
DRAFT INTERMEDIATE
PROGRESS REPORTS

**COLLECT PROOFS OF PROJECT
IMPLEMENTATION**

The results of your project will be generated throughout your operation. Sometimes these are material deliverables (studies, field developments, guide to good practice, etc.) and sometimes less tangible outputs (training, communication campaigns, workshops with the public, etc.).

In both cases, you will be required to prove to your donor their effective achievements during the eligibility period of your operation.

Proof of these achievements must be collected and transmitted when you draft your Implementation Reports/Accounts.

They generally take the form of:

- Technical reports which outline the progress of the project
- Financial reports justifying the statement of expenditure related to project activities

For multi-annual projects, implementation reports may be required:

- During the project («interim report»): either each year of the project or at mid-term (according to a schedule or rules defined by the donor)
- At the end of the project («final balance sheet»)

These crucial stages in the life of your project are important, as they determine whether or not you will receive the grant payment (interim, annual and final instalments).



Mathieu THEVENET (PIM Initiative, France):

«Some donors can give a substantial advance at the very beginning of the project, which enables the activities to be implemented smoothly. On the other hand, for some European projects, the interim payments are final and may be made several months after the report has been sent³. As an association, it is essential to keep this in mind, so as not to find yourself in the red in terms of cash flow and no longer be able to pay your employees or service providers».



In order to safeguard this approach:

- get acquainted with the reporting rules and models from the start of the project to get a good idea of the information required (generally mentioned in the contract or in the administrative and financial manual);
- depending on the supporting documents to be provided, remember to alert your organisation's administrative and financial departments as soon as possible to plan for any expenditure increases (human resources, financial and accounting departments);
- contact the donor if something is unclear;
- organise this feedback at the beginning of the project (important in the context of a multi-partner cooperation project);
- collect and organise the supporting documents (technical and financial) for the period in question, as requested by the funder, taking care to comply with the rules of communication (presence of logos, etc.), to make it easier for the reviewers to read and understand them;
- keep a copy (good quality paper and scanned version) of the supporting documents that you send with the reports.

Please note: in the case of some projects, the use of an external auditor to check the eligibility of expenditure is required by the funder (the funder sometimes provides standard terms of reference, which must be used). It will therefore be necessary to recruit them at the very beginning of the project (the costs of the service can often be covered by the project).

3/ Editor's note: the final payment is not automatically the anticipated amount. It is essential to plan well in advance, as there may be important differences between the expected payment and the final payment actually received.

The following are some examples to help justify the implementation of actions that are regularly found in projects.

Actions requiring justification	Supporting documents related to the action
Meeting	<ul style="list-style-type: none"> - Programme - Signed list of participants - Minutes - Photos/videos
Training	<ul style="list-style-type: none"> - Programme - Signed list of participants - Minutes - Photos/videos - Questionnaire and report - Certificate
Equipment	<ul style="list-style-type: none"> - Invoices - Justification for the use of the equipment - Photos
Communication rules	<ul style="list-style-type: none"> - Donor logo on all supports, documents, equipment... related to the project, according to the indications provided - Inclusion of a disclaimer for the project, programme and donor
....	<ul style="list-style-type: none">

PREPARE FOR THE CONTROL

From the start of the project, it is important to prepare all the supporting documents of your action for control purposes (procurement, meeting minutes, sign-off sheet, invoices and supporting documents, mission order, etc.; including the partners).

Once the reporting phase is over, the same structure must be maintained for archiving purposes. Anticipating the control is therefore essential for it to take place in the best conditions.

The project leader must maintain separate accounts for all expenditure relating to the operation. During on-the-spot visits and checks on operations, access to project accounting documents may be requested (advice: Assign a unique and specific accounting code to the expenditure required for the project; Keep separate accounts, tracing all expenditure relating to the project).

The declaration of expenditure incurred for the project must comply with 4 rules:

- 1 - Be recorded in the financial report specific to each programme
- 2 - Be effectively undertaken for the project
- 3 - Have been carried out during the project's eligibility period (except in the case of exceptions validated with the donor)
- 4 - Be traceable and backed up by conclusive supporting documents and archived after the project's duration

Controllers can revoke an expense:

- Several years after its execution or acquittal,
- by requesting details of the purpose, reality or interest of this expenditure in relation to the operation,
- and may conclude to the exclusion of certain expenses if they are not sufficiently justified.

Advice to grant beneficiaries:

- Draw up minutes for each meeting, working lunch, steering committee, etc,
- Specify in detail the purpose of the trips made and the names of the people met,
- Keep the timetables of the staff involved in carrying out the operation (working time valued as expenditure for the project),
- Keep email correspondence with partners and service providers,
- Maintain unique files specific to each contract awarded, integrating all the documents as they are received (e.g. notification of tender rejection, Tender Board report).



Sylvain VERDIER (Conservatoire du littoral, France):

«It is important to be clear about what has been achieved with the funding and how it has been used (as with a specific analytical code for each project). This is what the controllers will check.

For example, when a job is financed by several funding sources, it is necessary to be clear on the grid for determining the share covered by each agreement. The pay slip may not be enough for staff. The European Union needs to know how much time they spend working, because if an employee is financed 50% of the time, they are likely to ask for a weekly transcript of what they have done and how much work they have done on the EU-funded project. So they need to be able to produce a complete monitoring sheet or timesheet, because if the EU is not satisfied, the institution acts as guarantor and must refund the amount».





Céline DAMERY (Conservatoire du littoral, France):

«A few years after a project had finished, we had a control, during which we had to find supporting documents, notably for the technical deliverables that had been managed and produced by several people in the team (including some who had already left our organisation).

This collection phase was a headache and it caused a lot of stress as the control date approached. Since then, we have ensured that we have both a paper archive - with the original documents or copies, depending on the donor's requirements - and a digital archive of each of our projects, for both the documents related to expenses and the deliverables of each activity».



ASSESS THE IMPACT AND QUALITY OF THE ACTIONS

The impact is the effect that the activity carried out and its results have on people, practices, organisations and systems.

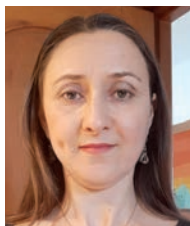
At the time of drafting your application, you outlined the impact that your project will have to a greater or lesser extent depending on the targets you have identified.

This impact should be assessed during the project and at its conclusion.

Specific indicators can be put in place to measure it. Specific activities can be planned to ensure it is achieved.

The dissemination and exploitation of results can help to maximise the effect of the activities carried out so that they have an impact on the immediate participants and partners in the years to come.

The benefits for other stakeholders must also be taken into account in order to make a greater difference and to derive maximum benefit from the project.



Saba GUELLOUZ

(Regional Activity Centre for Specially Protected Areas, Tunisia): «We know that a project will succeed when we succeed in doing tangible actions and when we succeed in moving forward, and when we succeed in listening and communicating with all the parties, who themselves are aware that they are moving forward in a shared vision. You really have to believe in the actions you want to implement and in their usefulness to get things moving, and avoid doing showcase activities or just «ticking the boxes», which are time-consuming and have little impact».



The results of your actions can be classified as either outputs or outcomes.

- **Output:** a tangible and quantifiable product produced by a given project; outputs can be accessible products such as programmes, studies, reports, materials, events or websites;
- **Outcome:** a non-tangible added value obtained by the achievement of the objectives and goals of a project. This added value does not lend itself to quantification, whether it covers tangible actions and events such as training, content or methodologies, or more abstract outcomes such as increased awareness, enhanced competences or improved skills of knowledge and experience acquired by participants, partners or other stakeholders in the project.

Impact assessment is an essential part of the process. It assesses achievements and generates recommendations for future improvements.

Indicators can be used to measure progress throughout your operation. These indicators help to measure performance and can be quantitative (numbers and percentages) or qualitative (quality of participation and experience). It is also possible to measure impact through questionnaires, interviews, observations and evaluations.

The definition of indicators related to the different project activities should be considered at the beginning of the project.





Pierre BOISSERY ((French Water Agency RMC):

«A project has 3 main stages: stating what you want to do, showing what you are doing, concluding. Therefore, the concept note must determine from the outset whether you are under an obligation to achieve results (e.g. delivery of a well-defined deliverable) or an obligation of means (e.g. testing an ecological restoration method).

There are too many projects with absent, partial or not very objective conclusions. Having a critical analysis and identifying the weak points or mistakes made during the project is often experienced as the fact that the project was poorly managed. However, if all has been well reasoned (why did our method fail, what are the positive or negative points of our approach? did we put all the necessary means in place or what improvements need to be made so that it can be reproduced?...), in my opinion, this shows, on the contrary, the honesty of the project leader, and our job as donors is then to assess the intensity and commitment of the project leader to carry out the operation.

We must avoid complacency or even self-satisfaction. Management charts can provide a whole host of indicators or data that do not answer the questions initially asked either. From the outset of the project, it is important to agree on how to evaluate the achievement of objectives and also to ensure that this final evaluation be carried out objectively. This will also help to justify the scope of your actions».



Below are a few examples:

- facts and figures relating to the project organiser's website (updates, visits, consultations, cross-references);
- number of meetings with key stakeholders;
- number of participants in discussions and information sessions (workshops, seminars, peer reviews); follow-up actions;
- production and distribution of products;
- media coverage (articles in specialised press, newsletters, press releases, interviews, etc.);
- social media visibility and attractiveness of the website;
- participation at public events;
- links with existing transnational networks and partners; transfer of information and know-how;
- impact on regional, national and international policy measures;
- Feedback from end-users, other stakeholders, peers and policy makers.



David DE MONBRISON (BRL Ingénierie, France): «Capitalisation through a participatory approach with the team and beneficiaries enables the lessons learned from the project to be collectively identified. This is very useful in the future for the implementation of new projects, to reinforce your capacity to improve your practices, and to see what you can continue to develop»

REPORT ON THE CORRECT TECHNICAL AND FINANCIAL IMPLEMENTATION

Project reporting is carried out by submitting interim and final technical and financial reports to your planning department.

Financial donors may have their own formats which are provided to you at the beginning of the project. Otherwise, it is up to you to propose a structured and clear reporting template, which you can use throughout the project.

In addition to these reports, supporting documents (necessary for 1st level controls - Service Check Done - or in-depth controls) can also be sent or made available.

The quality of your reports and your capacity to account for the correct implementation of your activities and expenditure determines the calculation of the instalments or reimbursements you receive.



Elodie RANDRIANARIJAONA

(RIT CEPF, Tany Meva Foundation, Madagascar):

«CEPF has a standard template to facilitate and streamline reporting. In this model, there is a box for the achievements carried out compared to the projections, there is also a section dedicated to «deviations» and «explanations of deviations», i.e. why the action did not take place as planned. In the monitoring indicators, the promoters often display the result (e.g. 2 out of 3 training courses carried out) but do not explain the issues encountered, even though this helps to clarify measures for improvement, the lessons to be learned and provides an opportunity for learning. Don't forget to send photos which are very relevant»

The interim report includes the progress of the project up to the reporting date. The final report describes the implementation of the project since the beginning (and not since the interim report).

In order to draft these reports effectively, it is necessary to:

- Begin drafting them as soon as possible and update them on a regular basis
- Surround yourself with people with key skills (e.g. working with your organisation's accountant for financial reporting)
- Take great care in writing and summarising information (and putting it into context). Have your report proofread by a partner or someone who is used to managing projects to make sure it is clear.
- Be honest in your self-assessment. Do not tamper with your results to «please» the donor! Projects are allowed to achieve less satisfactory results than expected. It is up to the project leader to know how to evaluate, explain it and to propose measures to improve these results.


If a template is provided by the donor, it must be used

- Make sure you send all the deliverables obtained during the period
- Make it easier for evaluators to read and understand (organise the appendices, explain discrepancies, translate supporting documents)



Céline DAMERY (Conservatoire du littoral, France):

For some multi-partner cooperation projects, the report is collective: each partner must contribute, and the report is submitted by the Lead Partner on behalf of the whole Partnership. You must therefore make sure that you allow sufficient time in your schedule to prepare and submit your report, as well as to consult and obtain the approval of the consortium. Obviously, the report must be written in the consortium's language so that each partner can check and validate the contents»





PHASE 5 | CLOSE AND SUSTAIN THE PROJECT

STAGE 9

ASSESS THE PROJECT AND SUBMIT IT TO THE DONOR; RECORD AND FILE THE SUPPORTING DOCUMENTS; BE AVAILABLE FOR AUDITS

Once the report has been finalised, you should not wait until the last moment to send your report (especially if the report has to be entered online on a dedicated website) and comply with the deadline for sending it to the planning department.

All products and results should be submitted together with the report in a structured manner⁴ to facilitate their evaluation.

The deliverables/results attached to the reports must bear the donor's logo. According to the funder's communication rules, they must also, according to the donor's expectations, bear the title, acronym and number of the project agreement.

If you refer to websites, the identifiers must be transmitted for the private parts of the website.

NB: Reports should not be used as a means of indicating major changes to your project (changes to the budget, work programme, partnership, etc.). These are subject to requests for amendments.

If the project is the subject of a single final report, this must cover the entire duration of the project (which may extend over several years).

4/ In folders for the «hard copy» (paper) versions and in organised directories for the electronic versions.

Calculation of the final grant (with imposed co-financing percentage)

$$\begin{array}{r}
 \text{Expenditure declared in the final report} \\
 - \\
 \text{Ineligible costs identified during the evaluation of your final report} \\
 \text{Costs may be ineligible by nature or, limited by the maximum ceilings provided for in the Call} \\
 \text{for Proposals (equipment, subcontracting, indirect costs) or, limited by the maximum rates} \\
 \text{provided for in the Call for Proposals (staff and subsistence costs).} \\
 \times \\
 \text{Percentage of co-financing stipulated in the contract} \\
 \text{(75 \% ; 50 \% ; etc.)} \\
 \text{Up to the maximum contribution established by the contract.} \\
 = \\
 \text{Final grant}
 \end{array}$$

Calculation of the grant balance (if one or more advances have been paid)

$$\begin{array}{r}
 \text{Total amount of grant awarded} \\
 - \\
 \text{Previously received advances} \\
 = \\
 \text{Payment of the balance (if positive) or Recovery (if negative)}
 \end{array}$$



Sylvain VERDIER (Conservatoire du littoral, France):

«For some projects, the European Union pays its contribution once the national contributions have been registered, in order to ensure that the financing plan is realistic. European funding must not be used to co-finance another project, at the risk of losing one of the two funding sources and having to reimburse what has already been paid out»;



Céline DAMERY (Conservatoire du littoral, France):

«Once, as part of a European project, the donor requested to see some «goodies» (small communication products) that we had produced. These included USB keys, pens, notebooks for taking notes during meetings and posters. We had distributed almost everything, fortunately we still had a few items in stock. Always remember to keep some too, and to take photos when you give them to partners, in order to prove that you have made and distributed them correctly and that the donor's advertising rules have been respected. For large printed deliverables (e.g. methodological guide, collection of good practices, etc.) also remember to keep an up-to-date distribution list».



BE AVAILABLE FOR THE CONTROL

The evaluation of a project is mandatory. Its format and the importance of the exercise depends, again, on the lead donor. In the case of projects with several co-funders, it is advisable to ensure that they agree to carry out only one evaluation according to the terms of the «strictest» donor. It consists in checking the accuracy of your balance sheet statements on the basis of supporting documents. In general, you must produce your balance sheet no later than six months after the end of the project.

It is important to anticipate the post-project working time in order to clarify or justify expenditure declared ineligible. If the reporting is well prepared, the control will be all the better!

What is checked:

- The conformity of the operation carried out to the agreed operation

Measurement of the conformity of your achievements (actual project) to your forecasts (planned project). On the basis of the actions described in your qualitative assessment and the supporting documents you provided (meeting minutes, information leaflet, publication, event photos, etc.).

→ Advertising requirements

On the basis of the documents you provide (website screenshots, posters, signing-in sheets...)

- The eligibility of participants

If the call for projects you have applied for is aimed at a certain public (specific beneficiaries, general public, job seekers, disadvantaged persons, etc.)

- Direct personnel costs

Provide proof of the materiality/reality of the expenditure (pay slips or an extract from the payroll book, etc.)
Provide proof of the time spent by the employee to carry out the operation (a job description, a letter of assignment by name or an employment contract, time sheets or extracts from time management software).

- Other expenditure

Their reality through invoices or accounting documents; their links to the transaction; their payments through a certified invoice paid by the supplier, a statement of account showing the corresponding debit.

- Territorial eligibility

If the project has taken place in a particular territory in accordance with the programme that provided funding (coastal or rural territory, cross-border or inter-regional area; etc.)

→ **Advice:**

- Be ready and available. The control can take place remotely (by e-mail or telephone) or on site. It may take time to validate reports. The final validation also generally conditions the payment of the last part of the project!
- Depending on the quality/quantity of information provided, the project promoter may be asked to complete or submit missing supporting documents. Bear in mind this exchange time with the funding body, which may have an impact on the payment deadline.
- Prepare a file with all the invoices and supporting documents for the project (paper and/or digital archives). Be organised so that you can easily find the requested documents using a clear nomenclature.
- Have detailed knowledge of the project. The project leader is present during the control. However, the funder may ask to meet certain project partners or beneficiaries to discuss their vision of the project. Also, if there is a change in the team (e.g. the project leader leaves), it is important that a full-time person can take over and is therefore briefed in the event of a subsequent control.



Jean-François CHEVALIER (Conservatoire du littoral, France):

«EU funding is built on numerous rules (referring to existing regulations, sometimes specified in the agreements) and is subject to several controls. The larger the project is in terms of financial volume, the more precise the control is (a genuine investigation to check the correct use of funds, to which we are sometimes not accustomed). The controls are more random on smaller projects.

The European Commission does not have the teams to check all expenditure, so they call on specialist firms. These controls often occur at a later time: sometimes the agents who worked on the project being checked have left the structure. This means that it is necessary to be very thorough, to keep track of everything, to classify everything carefully in order to avoid difficulties or anything «out of the ordinary» that needs to be explained. That's why strict archiving is very important».



STAGE 10

SUSTAIN AND PROMOTE THE RESULTS AND BENEFITS

The advantages of a well executed project are the notoriety it generates and the links created with people we would not necessarily have met and who can be useful for the development of future projects. This is why it is important to distribute and exploit the results of your project and maintain links with your partners.

A project has a start and an end date. It provides a means of achieving results and transforming a given situation. So there is a before and after the project.

To ensure that the effects of your operation are sustainable and that they contribute effectively to the development or structuring of your organisation and those of your partners, you must ensure that you effectively distribute and exploit the results obtained.

Durability/sustainability is the capacity of the project to continue and use its results at the end of the funding period. The results of the project can then be used and exploited in the longer term, possibly through marketing, demonstration or communication activities technical seminars, open access to the deliverables on the partner's website, etc). Not all results or parts of a project are necessarily sustainable and it is important to see dissemination and exploitation as a continuation after the end of the project and into the future.



Awatef ABIADH (RIT/CEPF, LPO, France):

«The project manager must always consider the sustainability of the project, a task that is carried out throughout the project. Seeking other funding on the basis of these achievements and using the results of a project to ensure other actions is part of the structure's overall strategy. Otherwise, it is a «one-shot» project with very little added value».



Sébastien LECCIA (Corsican Environment Office, France):

«New projects are often discussed during informal moments. For example, during a meeting after the steering committee, it is important to be present, to be open and curious, to listen to each other, and to go beyond the simple formal framework of the project that brings us together that day. It's a way to get to know each other better, to work together better, and to talk about the future. The end of the project is always the beginning of another»



→ The Valorisation/Exploitation plan

«Valorisation» can be defined as the process of disseminating and exploiting project results with the aim of increasing their value, enhancing their impact and integrating them into systems and practices in sectors at local, national and international level.

Taking the time to develop a comprehensive dissemination and exploitation plan has benefits for both the beneficiary as well as their partners. As well as increasing the visibility of the organisation, dissemination and exploitation activities often create opportunities to extend the project and its results or to develop new partnerships for the future. Quality dissemination and exploitation can also lead to the recognition of the work carried out by individuals from external sources and to strengthen credibility with local, national or international partners and donors. The sharing of results will enable others to benefit from the partnership's activities and experiences. The project results can serve as examples and sources of inspiration for others by showing what can be achieved through the programme you are working on.

This plan should be drawn up at the very beginning of a project (often at the proposal stage) and should include actions to be carried out continuously up to the end of the project (or even beyond).

In order to develop a good dissemination and exploitation plan, coordinators should be guided by the following questions:

- What is the expected outcome at the end of the project? (anticipate the results)
- What needs does the project meet? (a prio, to analyse the needs)
- Who are the final or potential users or beneficiaries of the project? (exploiting and sustaining the results)

In order to be effective, the dissemination and exploitation plan must identify:

- the types of dissemination and exploitation actions (what?);
- the most appropriate means (how?);
- the most appropriate and effective schedule (when?);
- the resources (human and financial) available.

→ Examples of objectives of dissemination and exploitation activities:

- to raise awareness;
- to extend the impact geographically;
- to engage stakeholders and target groups;
- to share solutions and know-how;
- to influence policy and practice;
- to develop new partnerships.

The identification of target groups, at various geographical levels (local, regional, national, European, international) and in the beneficiary's own field of activity (colleagues, peers, local authorities, other organisations carrying out the same type of activity, networks, etc.), is essential.

Activities and messages must be appropriately adapted to the target audiences and groups, for example:

- end-users of project activities and results;
- stakeholders, experts or practitioners in the field in question or other interested parties;
- policy makers at local, regional, national and international levels;
- press and media;
- the general public.

The plan should also:

- set realistic targets and timelines with partners to monitor progress;
- align dissemination and exploitation activities with the main phases of the project;
- be flexible enough to respond to the needs of the target group, as well as to wider developments in policy and practice.

→ Examples of activities at different stages of the project cycle:

→ BEFORE THE START OF THE PROJECT

- development of the dissemination and exploitation plan;
- definition of the impact and anticipated results;
- determination of the manner in which the results of the dissemination and exploitation activities will be distributed and the recipients.

→ DURING THE PROJECT

- Establish contact with the relevant media, e.g. at local or regional level;
- the organisation of regular activities, such as information sessions, training, demonstrations, peer reviews;
- the evaluation of the impact on the target groups;
- the involvement of other stakeholders with a view to transferring the results to end users, to new fields/policies.

→ AFTER THE PROJECT

- Further dissemination;
- the development of ideas for future cooperation;
- the evaluation of achievements and the impact;
- contacting the relevant media;
- contact with policy makers, where appropriate;
- cooperation with the donor by contributing to their dissemination and exploitation efforts through the provision of useful information.



CONCLUSIONS

Setting up a project is simply about setting an objective, finding the means to achieve it and keeping evidence of its achievement.



EVERY PROJECT HAS 5 DIMENSIONS:

- **A personal dimension:**

Committing to the construction of a project is above all a personal learning process. You need to know how to get started, and initially it is normal to make mistakes, the important thing being to learn from them and gain experience for future projects. *Learning by doing!*

- **A social dimension:**

A project is never set up alone, you will need others, within your team, your organisation or your network of partners. The project's lifecycle will be made up of interactions with your collaborators, dialogues with stakeholders, and even contacts with new partners that arise during the project.

- **A technical dimension:**

A good project is a well managed project, with tangible and useful results, whether for your own organisation or for the targeted beneficiaries.

- **An economic dimension:**

There is no project without a realistic budget. Every action has a cost, and it is important to plan for them during the setting up phase and to closely monitor them throughout the project so as not to be faced with consumption discrepancies in relation to the available budget.

- **A temporal dimension:**

Before, during, after... From the set-up phase, and even during its implementation, a good project must be thought out from the outset, sometimes evolving and adapting to consider a new context, and its results must be sustainable. To build solidly, therefore, takes time.

Reference : Methodological Guide to Project Management, Nuit des Initiatives - Minister of Youth Affairs, Sports and of Leisure Activities, 2004 (document in French)



