









# PROGRAMME – DAY 1







# **MORNING**

# SESSION 1 : <u>IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR</u> <u>EQUALITY BODIES</u>

- Presentation of the Rights, Equality and Citizenship Programme
- Identification and presentation of other appropriate programmes
- Identification of the relevant managing authorities of each programmes

# SESSION 2 : INTRODUCTION TO STRUCTURAL FUNDS (FRANCE AND BULGARIA)

- Presentation of the priorities of the programmes and cooperation
- Identification of the relevant managing authority
- Essential principles and rules in the selection of the projects

#### **SESSION 3: PARTNERSHIP AND APPLICATION METHODOLOGY**

- Building a strong partners' network
- Essential principles, participation rules and trends of intra-community programmes



# **AFTERNOON**

# **SESSION 4: THE LOGICAL FRAMEWORK APPROACH**

- Introduction to the Logical Framework approach
- WORKSHOP Preparation of a Logical Framework
- Conclusion of the workshop

# **SESSION 5 : BUDGETING RULES**

- Budgeting rules specific to the identified programmes Formalisation of the budget form
- WORKSHOP Preparation of a budget
- Conclusion of the workshop

# Roundtable – Evaluation of the first day by participants





# PROGRAMME – DAY 2







# **MORNING**

# **SESSION 6: THE EVALUATION AND COMMUNICATION STRATEGY**

- The evaluation plan of the project: Who? When? How?
- Outcomes and impact / Capitalisation
- The communication plan of the project how to communicate? How to disseminate?

# SESSION 7 : REPORTING OF THE PROJECT – SHOWING THE GOOD USE OF THE GRANT

- The financial and administrative reporting
- Payment procedure / Documentary evidence
- Good financial practices / External aid specificities

#### **EXERCISE: AUDIT OF A FINANCIAL REPORT**

- Participants, in the role of evaluators, will analyse a financial report and share their conclusions
- Good practices and writing principles

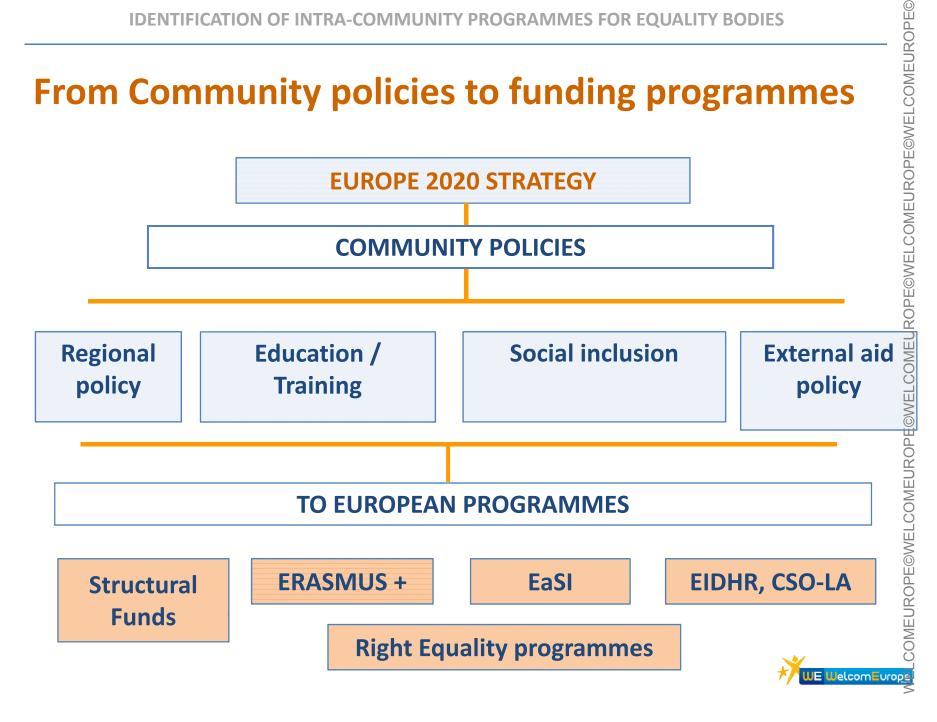
#### **CONCLUSION & QUESTIONS**



# SESSION 1 : <u>IDENTIFICATION OF INTRA-</u> <u>COMMUNITY PROGRAMMES FOR EQUALITY</u> BODIES



# From Community policies to funding programmes



# PERTINENT PROGRAMMES FOR EQUALITY BODIES

**Intra-community programmes** 

Rights, equality and citizenship programme

EaSI - PROGRESS

**ERASMUS +** 

**Other programmes** 

European instrument for Democracy and Human Rights

Human Rights, Education and Youth Programme

Structural funds – ex France, Bulgaria



# PERTINENT PROGRAMMES FOR EQUALITY BODIES

# **Intra-community programmes**

# Rights, equality and citizenship programme

EaSI - PROGRESS

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# Other programmes

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**Managing Authority: DG JUSTICE** 

**Global objective :** Contributing to the further development of equality and the promotion of the rights of people.

# **Priorities:**

- Promote non-discrimination, data protection, consumer rights
- Combat racism, xenophobia, homophobia and other forms of intolerance
- Promote rights of persons with disabilities
- Promote equality between women and men and gender mainstreaming
- Prevent violence against children, young people, women and other groups at risk





# **Types of funded actions:**

- Training activities (staff exchanges, workshops, development of training modules,...)
- Mutual learning, cooperation activities, exchange of good practices, peer reviews, development of ICT tools...
- Awareness-raising activities, dissemination, conferences,...
- Support for main actors (key European NGOs and networks, Member States' authorities implementing Union law,...)
- Analytical activities (studies, data collection, development of common methodologies, indicators, surveys, preparation of guides...)



<u>Eligible countries</u>: All Member States, Iceland and Liechtenstein\*

# **Application procedures**:

- Publication of the annual work programme in march 2016
- Application is done mainly through calls for proposals - 4 on-going calls for september/October
- Planned calls between September November
   2015 (9 calls in all)
- On-line submission through PRIAMOS system.

<sup>\*</sup>only for non-discrimination, racism, xenophobia, rights of persons with disabilities and equality between women and men...





Application forms: 3 mandatory templates for the grant application –

Annex 1: Project Description and Implementation Form

The template must be uploaded in the original Word format

Annex 2 : **Budget** 

The template must be uploaded in the original Excel format

Annex 3: <u>Partner/Associate Partner Declaration</u>

All the sections of the template shall be completed, signed and dated by the authorised signatory of the partner organisation and scanned. The Application package should contain one declaration for each partner.





# **SPECIFICITIES OF THE PROGRAMME**

- The project must be transnational and must be submitted by a partnership of eligible organisations.
- Projects must not have started prior to the date of submission of the grant application.
- Most of the calls provides the maximum of the funding allocation
- ❖ Applicants and partners must have stable and sufficient sources of funding to maintain their activity throughout the period for which the grant is awarded
- ❖ The applicant must present its balance sheets and profit and loss accounts for the last two available years (not applicable for public bodies)
- The applicant and the partners must have sufficient operational and professional capacities to implement the activities for which co-funding is requested.

# → LINKS

- 1. <a href="http://ec.europa.eu/justice/grants1/programmes-2014-2020/rec/index\_en.htm">http://ec.europa.eu/justice/grants1/programmes-2014-2020/rec/index\_en.htm</a>
- 2. <a href="http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1397223391719&uri=CELEX:32013R1381">http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1397223391719&uri=CELEX:32013R1381</a>
- 3. <a href="http://ec.europa.eu/justice/grants1/open-calls/index\_en.htm">http://ec.europa.eu/justice/grants1/open-calls/index\_en.htm</a>
- 4. <a href="http://ec.europa.eu/justice/grants/results/daphne-toolkit/en/browse-all-projects">http://ec.europa.eu/justice/grants/results/daphne-toolkit/en/browse-all-projects</a>

# **→**CONTACTS

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POSSIBILITIES ALSO THROUGH CALLS FOR TENDER !!!



# PERTINENT PROGRAMMES FOR EQUALITY BODIES

# **Intra-community programmes**

Rights, equality and citizenship programme

EaSI - PROGRESS

**ERASMUS +** 

# Other programmes

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Human Rights, Education and Youth Programme

Structural funds – ex France, Bulgaria



## **EASI - PROGRESS**

**Managing Authority: DG EMPLOYMENT** 

# **Global objective:**

The PROGRESS axis of EaSI helps the EU and its countries to improve policies in three thematic sections:

- 1. employment, in particular to fight youth unemployment;
- social protection, social inclusion and the reduction and prevention of poverty;
- 3. working conditions.

#### **Budget**: 919 million €

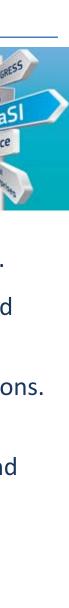
61% of the total EaSI budget will be allocated to the PROGRESS axis. Between 15 and 20% of this quota will be dedicated to social policy experimentation, with the aim to further develop its potential for employment and social innovation.



# **EASI - PROGRESS**

# **Types of funded actions:**

- Develop and disseminate high-quality comparative analytical knowledge.
- Facilitate effective and inclusive information-sharing, mutual learning and dialogue.
- Provide financial support to test social and labour market policy innovations.
- Provide organisations with financial support to increase their capacity to develop, promote and support the implementation of EU instruments and policies.





IE Welcom Europe

# **EASI - PROGRESS**



# **Eligible countries**:

EU countries;

EEA countries, in accordance with the EEA Agreement, and EFTA countries;

EU candidate countries and potential candidate countries, in line with the framework agreements concluded with them.

igible countries:

J countries;

A countries, in accordance with the EEA Agreement, and EFTA countries;

J candidate countries and potential candidate countries, in line with the framework agreements ancluded with them.

The PROGRESS axis of EaSI is open to all public and/or private bodies, actors and institutions

It can support cooperation with international organisations, and in particular with the Council of Europe, the OECD, the ILO, with other United Nations bodies and with the World Bank. bodies and with the World Bank.

#### **EASI - PROGRESS**



Example: Mobility experience for professionals

**Deadline**: 16/10/2015

#### Specificities of the call:

- b)
- SSI PROGRESS

  Application forms: through call for proposal published on the website of the DG employment and social affairs.

  Online submission on the indicated website:

  <a href="https://webgate.ec.europa.eu/swim/external/protected/editSubvention.do">https://webgate.ec.europa.eu/swim/external/protected/editSubvention.do</a>

  Indine: 16/10/2015

  Indication forms: through call for proposal published on the website of the DG employment and social affairs.

  Indicated website:

  <a href="https://webgate.ec.europa.eu/swim/external/protected/editSubvention.do">https://webgate.ec.europa.eu/swim/external/protected/editSubvention.do</a>

  Indicated website:

  Indicated website:
- promote a high-level of quality and sustainable employment, guarantee adequate and decent social protection, combat long-term unemployment and fight against poverty and social exclusion JE WelcomEurope

# **EASI – PROGRESS - Other financing possibilities :**



### **Call for tenders:**

Organisations from eligible countries can participate to call for tenders in the area of employment, social affairs and inclusion.

<u>Example</u>: Study to collect updated information for a limited number of substances to analyse the health, socio-economic and environmental impacts on workers ...

Deadline: 10/09/2015

The maximum amount of the contract is € 300,000

The tender guidelines gives information regarding the different tasks to be undergone, the deliverables and the budget available.

LINK: http://ted.europa.eu



# **EASI – PROGRESS - Other financing possibilities :**



#### **Call for interest:**

The European Commission is looking for independent experts with expertise in the policy areas of employment, social affairs and inclusion

Individuals can apply to these call for interest. Application is done on-line through the website https://webgate.ec.europa.eu/swim/external/experts/protect

ed/curriculum/edit.action

Information to be provides:

Curriculum vitae – fields of expertise– personal information qualification

If selected, the contract is due for a maximum of 5 years.



# → LINKS

- 1. <a href="https://webgate.ec.europa.eu/swim/external/protected/editSubvention.do">https://webgate.ec.europa.eu/swim/external/protected/editSubvention.do</a>
- 2. <a href="http://ec.europa.eu/social/main.jsp?catId=1081">http://ec.europa.eu/social/main.jsp?catId=1081</a>
- 3. <u>file://serveur-ibm/travail/Travail1/2015%20FORMATION/FSM/EQUINET/KE-04-14-701-3A-N.pdf</u>
- 4. <a href="http://ec.europa.eu/social/main.jsp?catId=1191&langId=en">http://ec.europa.eu/social/main.jsp?catId=1191&langId=en</a>

# **→**CONTACTS

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Unité D.3: Social Protection and Activation Systems

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# PERTINENT PROGRAMMES FOR EQUALITY BODIES

# **Intra-community programmes**

Rights, equality and citizenship programme

EaSI - PROGRESS

**ERASMUS +** 

# Other programmes

European instrument for Democracy and Human Rights

Human Rights, Education and Youth Programme

Structural funds – ex France, Bulgaria





# **Managing Authority:**

DG EDUCATION AND CULTURE and the EDUCATION, AUDIOVISUAL AND CULTURE EXECUTIVE AGENCY

# **Global objective:**

The new Erasmus+ programme aims to support actions in the fields of Education, Training, Youth and Sport for the period 2014-2020.

# The Education, training and youth strand is composed of 3 « Key actions »:

- ⇒ Key Action 1: Transnational mobility of higher education and vocational training students and staff
- ⇒ Key Action 2: Cross border partnerships among education institutions, including companies (SMEs, corporations)
- ★ Key Action 3: The policy dialogue with relevant European stakeholders

# **Types of actions funded for Key Action 2:**

- 1. Capacity building in the field of youth
- 2. <u>Strategic partnerships in the field of education, training and</u> youth

# **Capacity building in the field of youth:**

- ➤ To improve the quality and recognition of youth work, non-formal learning and enhance their synergies with other education systems, the labour market and society
- ➤ To promote transnational non-formal learning mobility between Programme and Partner Countries targeting young and vulnerable people with fewer opportunities,



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#### **ERASMUS +**

# Among financed actions for capacity building in the field of youth:

- Activities encouraging the policy dialogue, cooperation, networking and exchanges of practices. Large-scale youth events. Information and awareness campaigns
- Development of information, communication and media tools.
  Development of youth work methods, tools and materials and mobility activities
- > Youth Exchanges between Programme and eligible countries. Mobility of youth workers between Programme and eligible Partner Countries.

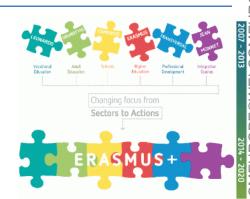
Budget 2015 - 9 millions €

# **Types of actions funded for Key Action 2:**

- 1. Capacity building in the field of youth
- Strategic partnerships in the field of education, training and youth

# Strategic partnerships in the field of education, training and youth

- Developing new approaches to strengthen the education and training paths of prospective and practicing educators/youth workers
- Supporting innovative projects aimed to reduce disparities in learning outcomes <u>affecting learners from disadvantaged backgrounds/with fewer</u> <u>opportunities</u>



# Among financed actions for capacity building in the field of youth:

- RASMUS +

  mong financed actions for capacity building in the field of youth:

  Activities of cooperation between regional authorities to promote the development of education, training and youth systems and their integration in actions of local and regional development

  Activities to support learners with disabilities/special needs to complete education cycles and facilitate their transition into the labour market, including by combating segregation and discrimination in education for marginalised Activities of cooperation between regional authorities to promote the
- by combating segregation and discrimination in education for marginalised communities
- Activities to better prepare and deploy the education and training professionals for equity, diversity and inclusion challenges in the learning environment

Budget 2015- 302 millions €





# **Eligible countries**:

ERASMUS + programme distinguishes between eligible countries and partner countries. Only eligible countries can be coordinator. can be coordinator.

# **Organisation of the programme**:

The actions of the Erasmus + programme are divided into decentralised actions and centralised actions:

- The decentralised actions are managed in each programme country by National Agencies
- http://ec.europa.eu/education/tools/national agencies
  s en.htm

  The centralised actions are managed at a European level by the Education, Audiovisual and Culture
  Executive Agency (EACEA) located in Brussels.
  http://eacea.ec.europa.eu/erasmus-plus en The centralised actions are managed at a European





# **Application forms:**

→ Online submission on the indicated website :

https://webgate.ec.europa.eu/swim/external/protected/editSubvention.do

Annex 1: <u>Project Description and Implementation Form</u>

The template must be uploaded in the original Word format

Annex 2 : **Budget**The template must be uploaded in the original Excel format

# Annex 3: **Declaration of honour**

The template needs to be fill in and signed and uploaded on the submission platform.

Publication of the Annual work programme 2016 in 3rd Quarter 2015



# **ERASMUS + - Other financing possibilities :**



### **Call for tenders:**

Organisations from eligible countries can participate to call for tender

Example: Study on gender-based violence in sport.

This study was initiated to better define and measure the scope of gender-based violence in professional and grassroots sports across the EU.

http://eacea.ec.europa.eu/about-eacea/calls-fortenders/study-gender-based-violence-in-sporteacea201502 en

Deadline: 25/06/2015

The maximum amount of the contract is € 300 000



# **OPEN call for tenders:**

Study on the Contribution of Sport to the Employability of Young People in the Context of the Europe 2020 Strategy

The aim of this study is to examine youth work quality systems in EU Member States .The outcome will be a handbook that gives guidance and support on basic quality principles and on the design and implementation of youth quality approach.

http://eacea.ec.europa.eu/about-eacea/calls-for-tenders/study-contributionsport-employability-young-people-in-context-europe-2020-strategy\_en

Deadline: 12/10/2015

The maximum amount of the contract is € 200 000





# SPECIFICITIES OF THE PROGRAMME

- Each organisation involved in the application must register in the Participant Portal and receive a Participant Identification Code (PIC).
- ❖ The applicant needs to prove their financial capacity for grants exceeding 60 000 EUR – document to be uploaded on the participant portal.
- Through the selection criteria, the National or Executive Agency assesses the applicant's financial and operational capacity to complete the proposed project.
- The applicant has the necessary professional competencies and qualifications to carry out the proposed project
- The electronic form must be completed in one of the official languages spoken in Programme Countries (or one of the EU official languages.)



# → LINKS

- 1. <a href="http://eacea.ec.europa.eu/erasmus-plus/actions\_en">http://eacea.ec.europa.eu/erasmus-plus/actions\_en</a>
- 2. <a href="http://ec.europa.eu/programmes/erasmus-plus/discover/guide/index\_en.htm">http://ec.europa.eu/programmes/erasmus-plus/discover/guide/index\_en.htm</a>
- 3. <a href="http://ted.europa.eu/TED/main/HomePage.do">http://ted.europa.eu/TED/main/HomePage.do</a>
- 4. <a href="http://ec.europa.eu/education/tools/national agencies en.htm">http://ec.europa.eu/education/tools/national agencies en.htm</a>

# **→**CONTACTS

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Unit A.6 - Erasmus + : Sport, Youth and EU Aid Volunteers (EACEA)

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#### **Erasmus Plus National Agency - France**

Bordeaux Agency for Education strand: 05 56 00 94 00

INJEP for the Youth strand: : 01 70 98 93 70

#### **Erasmus Plus National Agency - Bulgaria:**

Human Resource Development Centre (HRDC): 00359 2 91 550 10



# PERTINENT PROGRAMMES FOR EQUALITY BODIES

# **Intra-community programmes**

Rights, equality and citizenship programme

EaSI - PROGRESS

**ERASMUS +** 

# Other programmes

European instrument for Democracy and Human Rights

Human Rights, Education and Youth Programme

Structural funds – ex France, Bulgaria



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#### **EUROPEAN INSTRUMENT FOR DEMOCRACY AND HUMAN RIGHTS**

## **Objective:**

→ To strengthen international and regional frameworks for the promotion and protection of human rights, justice, the rule of law and democracy in accordance with Union policy priorities

# **Priorities:**

- > Support to human rights and human rights defenders in situations where they are most at risk
- Support to other priorities of the Union in the field of human rights
- Support to democracy
- > Support to targeted key actors and processes, including international and regional human rights instruments and mechanisms
- ➤ Promotion and protection of human rights and fundamental freedoms = support for, protection of, and assistance to human rights defenders

#### **EUROPEAN INSTRUMENT FOR DEMOCRACY AND HUMAN RIGHTS**

# **Among financed actions:**

- Support to:
  - local civil society's contribution to EU human rights dialogues
  - the development and implementation of international and regional human rights
  - international criminal justice instruments and mechanisms, including the International Criminal Court





Amount and co-financing rate of the total eligible costs depend on the calls



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# EUROPEAN INSTRUMENT FOR DEMOCRACY AND HUMAN

**RIGHTS** Application forms:



→ submission in electronic format (CD-ROM) and in a separate and single file, send by post

#### **Annexes**:

Part A: concept note

Part B: full application form),

Part C: budget and logical framework

# → LINKS

- 1. <a href="https://ec.europa.eu/europeaid/funding">https://ec.europa.eu/europeaid/funding</a>
- 2. <a href="https://ec.europa.eu/europeaid/funding/funding-instruments-programming/annual-work-programmes en">https://ec.europa.eu/europeaid/funding/funding-instruments-programming/annual-work-programmes en</a>

# **→**CONTACTS

EC delegations - <a href="http://www.eeas.europa.eu/delegations/index\_en.htm">http://www.eeas.europa.eu/delegations/index\_en.htm</a>

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**ERASMUS +** 

**CONSUMER PROGRAMME** 

# Other programmes

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# **GLOBAL OBJECTIVE:**

- Human rights and democracy: youth policy and youth work promoting the core values of the Council
- Youth policy and youth work promoting intercultural dialogue "Living together in diverse societies"
- Social inclusion of young people
- Policy approaches and instruments benefiting young people and children



#### **PRIORITIES:**



# Good governance

Developing youth policies based on the Council of Europe standards, with a view to supporting young people's access to rights

# Promoting democratic competences

Increasing youth's competences in human rights education and education for democratic citizenship to act as multipliers in member states

# Building capacities for dialogue

Preparing the youth to contribute in peace building, conflict transformation and intercultural dialogue with neighbouring regions Member states and non-governmental partners





## **PRIORITIES:**

# Strengthening participation

Quality education in Cultural Convention States are developed (formal and non-formal settings)

Education and youth group work for Roma, migrants and other vulnerable groups

# Strengthening social cohesion

Education and training for young people's autonomy and better transition from education to working life/labour market

Improving access to human rights by developing youth policy responses to exclusion, discrimination and xenophobia, in particular in disadvantaged areas and for vulnerable groups





# **Financed actions**

- Pilot projects run by NGOs and youth local groups to undertake actions related to human rights education with young people
- National and regional training courses in human rights education

# **Application procedures**:

Different procedure: on-line subscription to be a partner in the programme and participate in the different actions implemented by the programme. <a href="http://www.coe.int/t/dg4/youth/">http://www.coe.int/t/dg4/youth/</a>





# **Eligible countries**:

European Union, Candidate countries, European Economic Area, Switzerland.

# **Eligibility criteria**:

- 1. Be directly related to young people and to human rights education
- Local association, institution or youth group acting directly with children, young people or a specific target group
- 3. The project must have an innovative character, be open to other partners of the Youth Programme on Human Rights Education

# → LINKS

- 1. <a href="https://www.coe.int/t/dg4/youth/coe">https://www.coe.int/t/dg4/youth/coe</a> youth/coe and young people EN.a <a href="mailto:sp?">sp?</a>
- 2. <a href="http://www.coe.int/t/dg4/youth/">http://www.coe.int/t/dg4/youth/</a>

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# PERTINENT PROGRAMMES FOR EQUALITY BODIES

# **Intra-community programmes**

Rights, equality and citizenship programme

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**ERASMUS +** 

**CONSUMER PROGRAMME** 

# Other programmes

European instrument for Democracy and Human Rights

Civil society organisation and local Authorities

Human Rights, Education and Youth Programme

Structural funds – ex France, Bulgaria





# SESSION 2: INTRODUCTION TO STRUCTURAL FUNDS



# **Structural funds**

# **Managing Authority:**

Depending on the Member state organisation. It can be managed either by national authorities or regional/local authorities

# It consists of 2 funds:

- 1. ERDF (Equipment)
- 2. ESF (Human resources)

# OMEUROPE©WELCOME

# **Global objective:**

Regional Policy targets all regions and cities in the European Union in order to support job creation, business competitiveness, economic growth, sustainable development, and improve citizens' quality of life..



# **ESF in FRANCE**

# Allocated budget (2.893 billion €):

65 % of ESF budget is managed on national ground



# National priorities 2014-2020:

- Assisting unemployed and inactive persons, including young people in unemployment and those young people who are most disconnected from the labour - 454 million € allocated budget
- Securing career pathways by means of forward planning of jobs and skills, training for low-skilled workers, women and older people, training for workers made redundant, and encouraging businesses to commit to equal pay and opportunities 707 million € allocated budget
- Reducing poverty, helping vulnerable people and promoting inclusion 1.634 million €



## **ESF in FRANCE**

# Allocated budget (2.893 billion €):

35% of ESF budget is managed by the regional authorities



# **Regional priorities 2014-2020:**

- Giving access and providing "training" to people in need
- Investing in lifelong skills, education, and training at the regional ground

# **Organisation of the programme**:

The priorities and actions to be implemented are written in an operational programme and validated by the European Commission.

Both national and regional ESF operate through <u>call for proposals</u>. However in some region, the managing authority will allow on-going submission.

On-line submission through official participant portal



## **ESF in BULGARIA**

# **Managing Authority:**

Administration of the Council of Ministers.

Ministry of Labour and Social Policy

Ministry of Science and Education - General Directoral Structural Funds and International Educational Programmes



# 3 operational programmes of ESF:

## The Operational programme « Good Governance »:

- Modernising Public Administration: to reduce administrative and regulatory burden on citizens and business - 118 million €
- Improving the quality, independence and efficiency of the judiciary: to increase transparency and accelerate judicial proceedings through structural, procedural and organisational reforms in the judiciary 30 million €



# The Operational programme "Human Resources Development":



Employment will be boosted by projects targeting better access to jobs and helping long-term unemployed and young people, particularly those not in employment, education or training up European Social Fund Investing in people

- ➤ Social inclusion measures. These will target groups such as the young and older members of society, those with disabilities, and minorities such as Roma. Social entrepreneurship and access to vocational training will be promoted, as will better access to health and social care services 286 million €
- Improvements to public services that deal with employment and social or healthrelated matters. Funding for transnational exchanges of good practice will help to achieve this.



# The Operational Programme "Science and Education for Smart Growth":



Strengthening research and innovation: developing centres of excellence and centres of competence, as hubs of high-quality research and innovation in the areas defined in the Research and Innovation Strategy for Smart Specialisation − 243 million €

European Social Fund Investing in people

- Enhancing education and social inclusion at all educational levels:
  - improving key competences of students and children, including through innovative teaching methods. It will promote the quality of higher education with a view of obtaining better outcomes on the labour market, as well as the modernisation of vocational education and life-long learning 220 million €
  - integration of children at risk of exclusion from education, on account of belonging to marginalised ethnic groups or to groups with specific educational needs 110 million €







# **Organisation of the programme**:

- 1. The priorities and actions to be implemented are written in an operational programme and validated by the European Commission.
- 2. The Managing authorities operate through <u>call for proposals</u>. However there are also possibilities to receive direct awards.
- 3. On-line submission through official participants portal <a href="https://eumis2020.government.bg/">https://eumis2020.government.bg/</a>



# → LINKS

- 1. <a href="http://www.eufunds.bg/">http://www.eufunds.bg/</a>
- 2. <a href="http://www.eufunds.bg/bg/page/58?status=1&programme">http://www.eufunds.bg/bg/page/58?status=1&programme</a>
- 3. <a href="http://www.ophrd.government.bg">http://www.ophrd.government.bg</a>
- 4. <a href="https://eumis2020.government.bg/bg/a6167455">https://eumis2020.government.bg/bg/a6167455</a>

# **→**CONTACTS

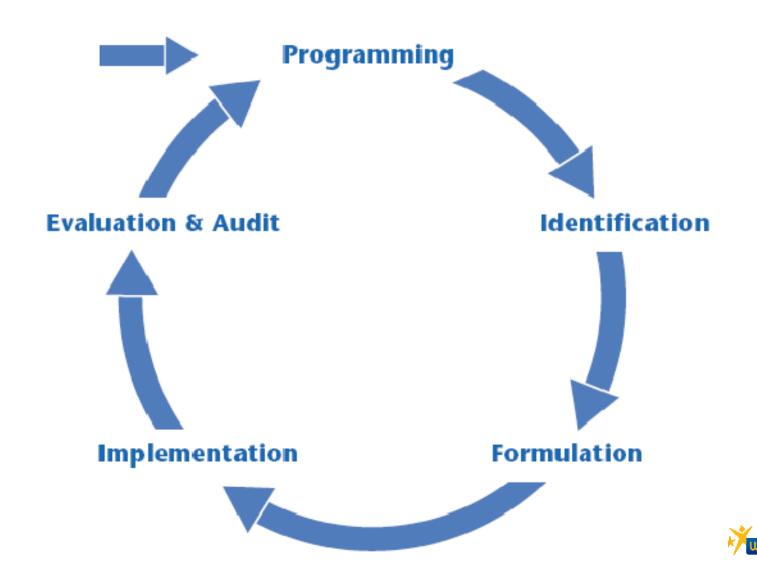
Siana Stoyanova - HEAD OF HRD Operational programme Authority <a href="mailto:s.stoyanova@mlsp.government.bg">s.stoyanova@mlsp.government.bg</a>



SESSION 4: THE LOGICAL FRAMEWORK



# **Project Cycle Management**

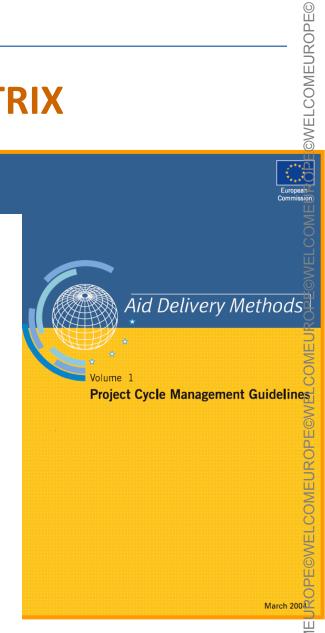


# THE LOGICAL FRAMEWORK MATRIX

http://ec.europa.eu/development/icenter/repository/pcm\_guidelines\_2004\_a4.pdf

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LOGICAL FRAMEWORK							
	Intervention logic	Objectively verifiable indicators of achievement	Sources and means of verification	Assumptions H			
Overall objectives	What are the overall broader objectives to which the action will contribute?	What are the key indicators related to the overall objectives?	What are the sources of information for these indicators?	)PE@WELCON			
Specific objective/ Purpose	What specific objective is the action intended to achieve to contribute to the overall objectives?	Which indicators clearly show that the objective of the action has been achieved?	What are the sources of information that exist or can be collected? What are the methods required to get this information?	Which factors and conditions outside the Beneficiary's responsibility are necessary to achieve that objective? (external conditions). Which risks should be taken into consideration?			
Expected results	The results are the outputs envisaged to achieve the specific objective? What are the expected results?	What are the indicators to measure whether and to what extent the action achieves the expected results?	What are the sources of information for these indicators?	What external conditions must be met to obtain the expected results on schedule?			
Activities	What are the key activities to be carried out and in what sequence in order to produce the expected results?	Means/Resources What are the means required to implement these activities, e. g. personnel, equipment, training, studies, supplies, operational facilities, etc.	Costs/Budget What are the action costs? How are they classified?	What pre-conditions are required before the action starts? What conditions outside the Beneficiary's direct control have to be met for the implementation of the planned activities?			

# ANALYSIS PHASE

- ★ Stakeholder analysis identifying & characterising potential major stakeholders; assessing their capacity
- ★ Problem analysis identifying key problems, constraints & opportunities; determining cause & effect relationships
- Objective analysis developing solutions from the identified problems; identifying means to end relationships
- Strategy analysis identifying different strategies to achieve solutions; selecting most appropriate strategy.

★ 1. Stakeholder Matrix

★ 2. Problem tree

★ 3. Objective tree

★ 4. Choice of Strategy

# **PLANNING PHASE**

- **♦ Developing Logical Framework** matrix - defining project structure, testing its internal logic & risks, formulating measurable indicators of success
- ★ 5. Logical Framework Matrix

  ★ 6. Action Plan (Gantt Diagram)
- ★ Activity scheduling determining the sequence and dependency of activities; estimating their duration, and assigning responsibility

- **♦ Resource scheduling** from the activity schedule, developing input schedules and a budget
- ★ 7. Provisional Budget

# **ANALYSIS PHASE**

- ★ Stakeholder analysis identifying & characterising potential major stakeholders; assessing their capacity
- ★ 1. Stakeholder Matrix

- ★ Problem analysis identifying key problems, constraints & opportunities; determining cause & effect relationships
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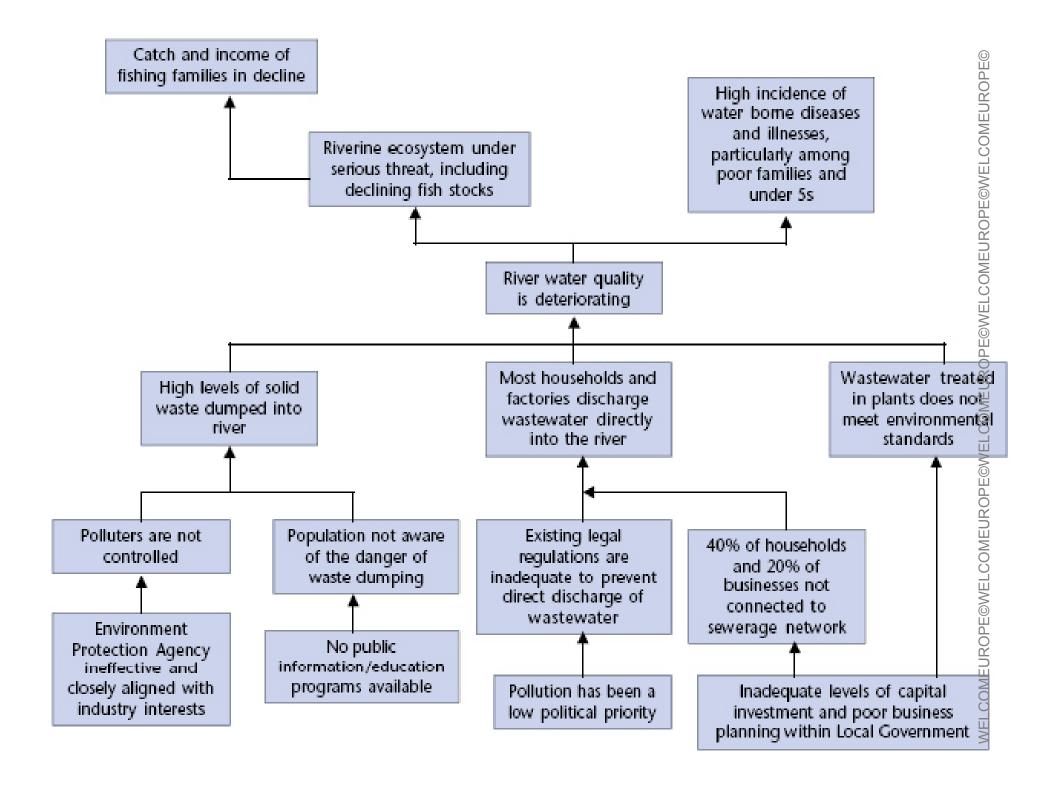
Stakeholder and basic characteristics	Interests and how affected by the problem(s)	Capacity and motivation to bring about change	Possible actions to address stakeholder interests
Fishing families: c.20,000 families, low income earners, small scale family businesses, organised into informal cooperatives, women actively involved in fish processing and marketing	<ul> <li>Maintain and improve their means of livelihood</li> <li>Pollution is affecting volume and quality of catch</li> <li>Family health is suffering, particularly children and mothers</li> </ul>	<ul> <li>Keen interest in pollution control measures</li> <li>Limited political influence given weak organizational structure</li> </ul>	Support capacity to organize and lobby     Implement industry pollution control measures     Identify/develop alternative income sources for women and men
Industry X: Large scale industrial operation, poorly regulated and no-unions, influential lobby group, poor environmental record	<ul> <li>Maintain/increase profits</li> <li>Some concern about public image</li> <li>Concern about costs if environmental regulations enforced</li> </ul>	Have financial and technical resources to employ new cleaner technologies     Limited current motivation to change	Raise their awareness of social and environmental impact     Mobilise political pressure to influence industry behaviour.      Strengthen and enforce environmental laws
Households: c.150,000 households discharge waste and waste water into river, also source some drinking water and eat fish from the river	<ul> <li>Aware of industrial pollution and impact on water quality</li> <li>Want to dispose of own waste away from the household</li> <li>Want access to clean water</li> </ul>	Limited understanding of the health impact of their own waste/ waste water disposal     Potential to lobby government bodies more effectively     Appear willing to pay for improved waste management services	Raise awareness of households as to implications of their own waste disposal practices     Work with communities and local government on addressing water and sanitation issues
Environmental protection agency: Etc	etc	etc	etc

# **ANALYSIS PHASE**

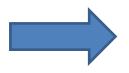
- ★ Stakeholder analysis identifying & characterising potential major stakeholders; assessing their capacity
- **\* 1. Stakeholder Board**

- ♦ Problem analysis identifying key problems, constraints & opportunities; determining cause & effect relationships
- ★ 2. Problem tree

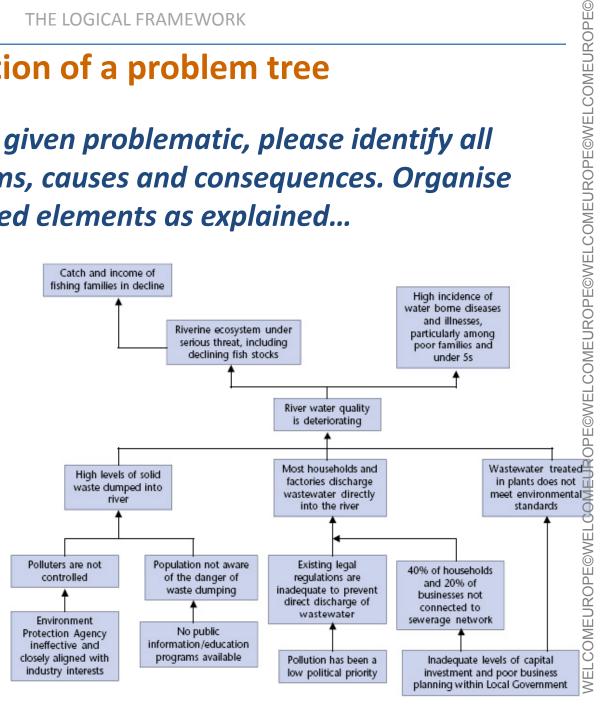
- ◆ Objective analysis developing solutions from the identified problems; identifying means to end relationships
- ★ Strategy analysis identifying different strategies to achieve solutions; selecting most appropriate strategy.



# **Exercise: Elaboration of a problem tree**



Based on a given problematic, please identify all the problems, causes and consequences. Organise the identified elements as explained...



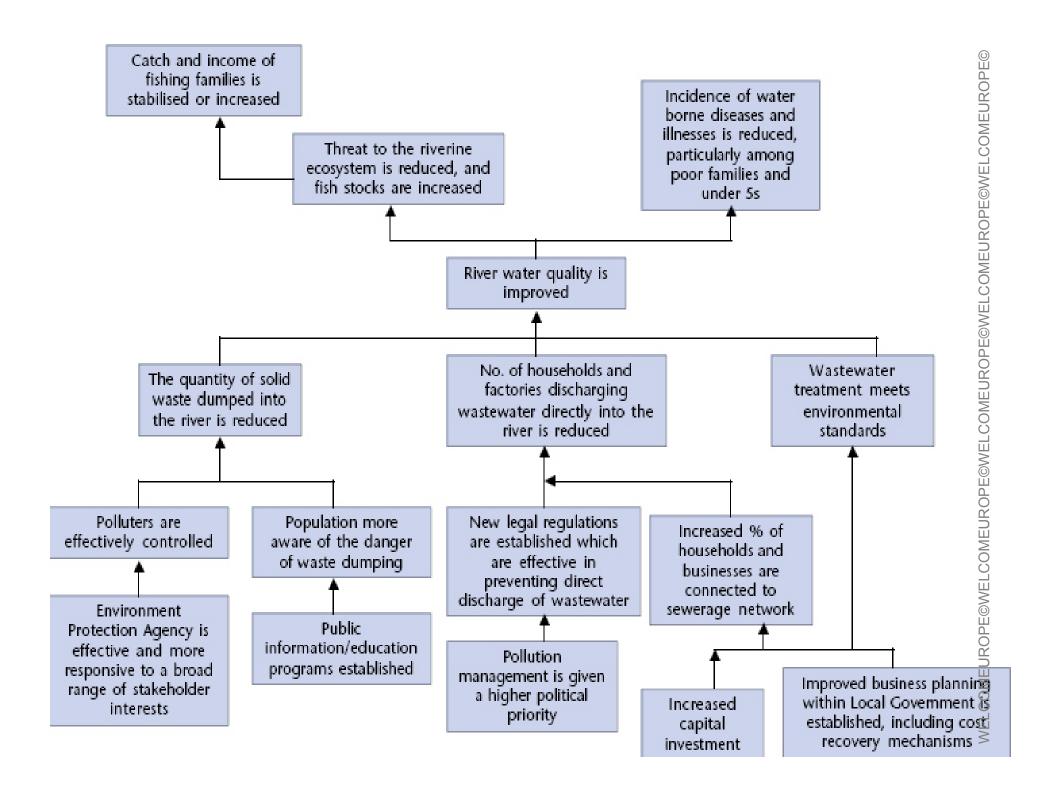
# ANALYSIS PHASE

- ★ Stakeholder analysis identifying & characterising potential major stakeholders; assessing their capacity
- **★ 1. Stakeholder Board**

- ♦ Problem analysis identifying key problems, constraints & opportunities; determining cause & effect relationships
- **★ 2. Problem tree**

- ◆ Objective analysis developing solutions from the identified problems; identifying means to end relationships
- **★ 3. Objective tree**

Strategy analysis - identifying different strategies to achieve solutions; selecting most appropriate strategy.



### **Exercise:** Elaboration of an objective tree



- 1. Referring to the instruction and based on your problem tree, please define your objective tree and distinguish between your overall objective, specific objective and the results
- 2. Define the related activities and the means/costs needed.

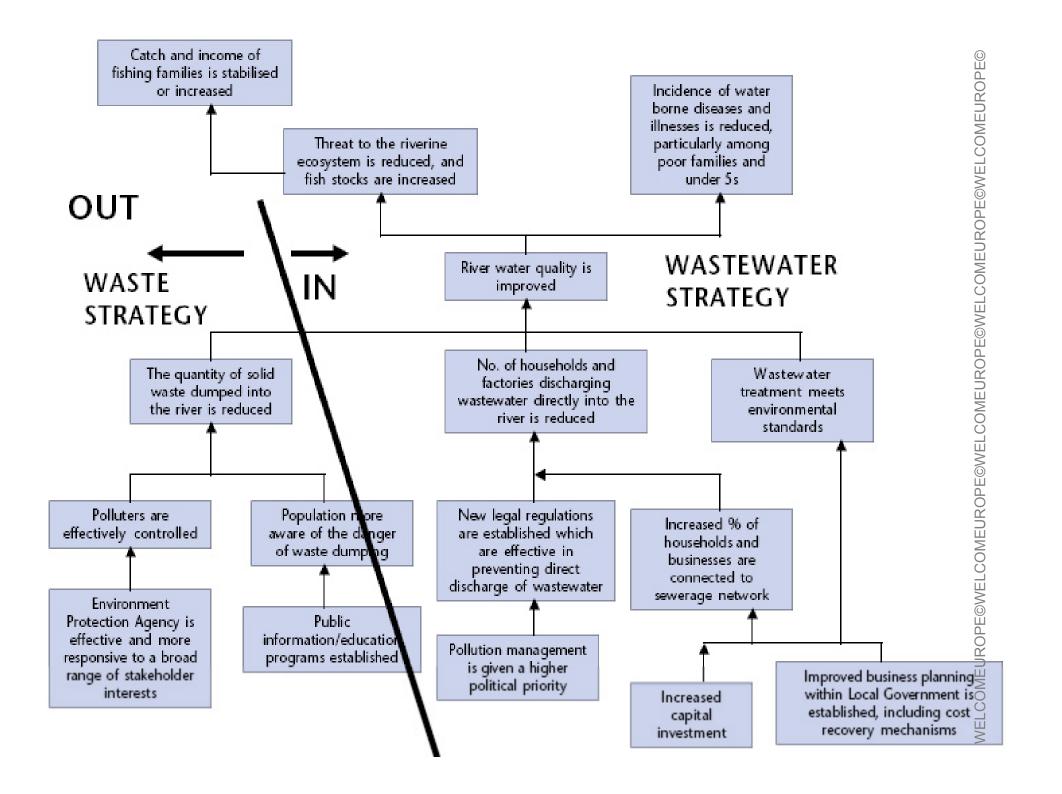
#### ANALYSIS PHASE

- ★ Stakeholder analysis identifying & characterising potential major stakeholders; assessing their capacity
- ★ 1. Stakeholder Board

- ★ Problem analysis identifying key problems, constraints & opportunities; determining cause & effect relationships
- **★ 2. Problem tree**

- ◆ Objective analysis developing solutions from the identified problems; identifying means to end relationships
- ★ 3. Objective tree

- ★ Strategy analysis identifying different strategies to achieve solutions; selecting most appropriate strategy.
- ★ 4. Choice of Strategy



LOGICAL FRAMEWORK				
	Intervention logic	Objectively verifiable indicators	Sources and means of	Assumptions
		of achievement	verification	П
Overall objectives	To contribute to improved family health, particularly of under 5s, and the general health of the riverine ecosystem	Incidence of water borne diseases, skin infections and blood disorders caused by heavy metals, reduced by 50% by 2008, specifically among low-income families living along the river	Municipal hospital and clinic records, including maternal and child health records collected by mobile MCH teams. Results summarized in an Annual State of the Environment report by the EPA.	assumptions that must hold true for the "Overall Objective" achievement:  The pubic awareness campaign conducted by the Local Government impacts positively on families sanitation and hygiene practices  Fishing cooperatives are effective in limiting thein their members exploitation of fish 'nursery' areas
Specific objective/ Purpose	Improved river water quality	Concentration of heavy metal compounds (Pb, Cd, Hg) and untreated sewerage; reduced by 25% (compared to levels in 2003) and meets established national health/pollution control standards by end of 2007	Weekly water quality surveys, jointly conducted by the Environmental Protection Agency and the River Authority, and reported monthly to the Local Government Minister for Environment (Chair of Project Steering Committee)	assumptions that must hold true for the "Purp se" achievement:  .River flows maintained above X mega litres per second for at least 8 months of the year  .Upstream water quality remains stable
Expected results	Result 1: Reduced volume of waste-water discharged into the river system by households and factories	70% of waste water produced by factories and 80% of waste water produced by households is treated in plants by 2006	Annual sample survey of households and factories conducted by Municipalities between 2003 and 2006	assumption that must hold true for the "result de la chievement:  No delay in the building of the infrastructure due in the part of the work partially sub contracted to a local entrepreneur
Activities	Activity 1.1 Conduct baseline survey of households and businesses pollution  Activity 1.2 Identify appropriate incentives for factories to use clean technologies  Activity 1.3 Complete engineering specifications for expanded sewerage network  Activity 1.4 -Building of the infrastructure of the sewerage network partially subcontracted and made in cooperation with municipalities services  Others Activities	Means/Resources required for all the activities implementation human resources 1 manager 24 months 2 researchers 12 months travel 1 miss Brus/Abidjan 1 miss Abidjan/Brus equipment 1 car purchase others costs 4 studies 3 conferences 1 work contract	Sources of information about action progress: .4 meetings/every 3 months of the Project Committee .external evaluation and report of the activities achievement by an external organisation (local NGO)  Costs/Budget  10800 3600  1000 6000 30000 30000 55400 15000 250000	Activity 1.1:  .all the necessary documents (canalization, plans) are provided by the Local Government Services to the Project Team (indicated as positive through preliminary discussions, but not yet fully confirmed) pre-conditions:  .Sustained commitment  .Sustained Commitm



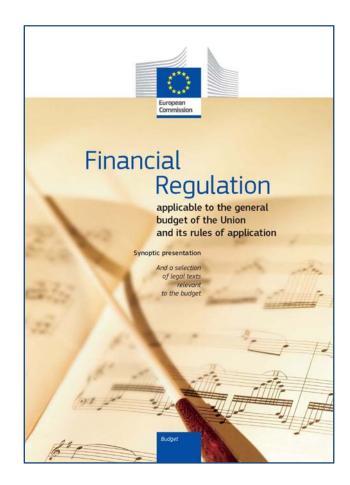
**SESSION 5 : BUDGETING RULES** 



## Mastering budget principles and rules

Legal sources: Financial
 Regulation (title VI) and its
 implementing rules (available
 on the DG Budget website)

http://ec.europa.eu/budget/biblio/documen ts/regulations/regulations\_en.cfm



#### **BUDGETING RULES**

# Rules and principles

- Consistent
- Balanced
- In line with financial conditions, rate of co-financing,
   matching funds, allowable costs, etc.
- Analytical approach: dissociate project budget from organization budget



#### SPECIFIC RULES AND PRINCIPLES

#### Right and citizenship programme -

<u>VAT inquiry</u>: If the applicant or one of the partners is a public entity, it should be identify in the sheet Forecast Budget as VAT is not eligible for public authorities.

<u>Subcontracting</u>: the tasks that will be subcontracted need to be clearly identified and duly explained- reasons for the lack of the relevant expertise within the Partnership.

The estimated costs of the subcontracting are clearly identifiable in the estimated budget.



#### **SPECIFIC RULES AND PRINCIPLES**

#### **ERASMUS + programme –**

<u>Budgeting</u>: This programme combines unit cost and real costs on the budget chapters.

For example: Unit cost for a teacher/trainer/ technician + Staff cost < 40% of the total budget

Idem for mobility cost - For travel distances between 100 and 499 KM: 180 EUR per participant

#### SPECIFIC RULES AND PRINCIPLES

#### <u>Structural funds</u> –

### Depending on the countries, the rules are not the same.

For example, in France, contribution in kind is eligible on the ESF. However, the applicant need to bring forward proven documents.

For project under 50 000 €, the application of flat rate calculation is compulsory.

#### EIDRH -

**Application of contingency reserve** – flat rate of 5% of the total budget.



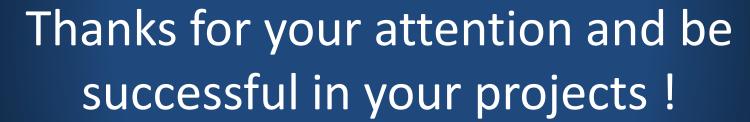
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