

# TECHNICAL GUIDANCE ON EFFECTIVE INTERVENTIONS IN SOCIAL SERVICES

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POLICY RECOMMENDATIONS  
AND PRACTICAL STEPS FOR  
MANAGING AUTHORITIES AND  
THE EUROPEAN COMMISSION



Co-funded by  
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# THE HELPDESK PROJECT

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## **“Social sErviceS helpdesk on EU Funds”**

(HELPDESK) project aims to reach the main European and national stakeholders involved in EU funding (shared management) and social services providers to work more efficiently in distributing and using European Social Fund+ (ESF+) and the European Regional Development Fund (ERDF). The partnership develops several tools during the project, to facilitate this process as result of collecting knowledge on needs and challenges as well as good practices of users and of ESF+/ERDF managing bodies and intermediate bodies to efficiently finance social services in EU members states.

The project makes sure to create building blocks for the design and operationalisation of Social Services Helpdesk platform with two main priorities:

- To support social service providers and local/regional coordinators for social services in accessing and using EU funds (ESF+ and ERDF in particular);
- To assist national Managing Authorities (or similar bodies) efficiently allocate EU funds (ESF+, ERDF in particular) to finance quality interventions in the field of social services.

The HELPDESK Project works towards three main objectives:

- Promoting capacity building and awareness raising about ESF+, ERDF (and other relevant EU funds) about how such funds can better support effective social services interventions.
- Facilitating the simplification of the access and use of EU funds for social services.
- Facilitating the exchange and cooperation between Managing Authorities, social services providers and coordinators, and the European Commission to ensure that funding priorities are based on an assessment of needs and target effective evidence-based social services interventions.

As visible from the priorities and objectives of the project, main target groups can be defined as:

- European Commission.
- Managing Authorities and intermediate bodies (or corresponding national / regional / local authorities).
- Social Services (local / regional / national).

# EXECUTIVE SUMMARY

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The Technical Guidance on Effective Interventions in Social Services offers a comprehensive toolkit for Managing Authorities (MAs) and social services to optimise the utilisation of European Social Fund Plus (ESF+) and European Regional Development Fund (ERDF) resources.

The development of this guidance involved a multifaceted research approach, beginning with desk research to create Country Profile Sheets for each EU Member State. These sheets provided crucial insights into funding priorities, amounts, and managing bodies at the national level. A European survey targeting both MAs and Social Services across the 27 Member States was conducted to assess needs, challenges, and opportunities in accessing and utilizing ESF+ and ERDF funds. Additionally, National Evidence Gathering Fora (NEGF) facilitated in-depth discussions among stakeholders, confirming emerging trends and providing qualitative insights. Existing literature was reviewed to further supplement findings, and a series of cross-sectoral and thematic workshops were held to elaborate on effective intervention strategies.

The Technical Guidance addresses critical gaps and challenges faced by MAs and Social Services alike. From streamlining fund management processes to maximising social impact, this guidance offers actionable strategies to foster collaboration and innovation in the delivery of social services according to the different types of stakeholders, whether social service providers, MAs (implementing and political) or the European Commission (EC).

The present document is based on the summary of the outcomes included in the final version of the Technical Guidance on Effective Interventions in Social Services. The present document outlines key policy recommendations for MAs and the EC to consider when programming and implementing interventions. These recommendations emphasise inclusivity in consultation processes, flexibility in calls for proposals, and the promotion of complementarity between EU funds. Additionally, there is a focus on capacity building, staff training and support programs, setting goals tailored to the needs of marginalised groups, and incorporating qualitative indicators in project evaluation. The policy recommendations are the result of a comprehensive collaboration with social services, MAs, the EC and other relevant stakeholders. The identified measures represent the will to foster the ongoing cooperation for a greater impact. The document also provides practical steps that MAs can take to immediately improve the delivery of social services.

For each recommendation, the Helpdesk project identified the main targeted stakeholder: Managing Authorities (MAs) – political policy makers (politics) or implementing public authorities (administrations) – and/or the EC.

## Programming and Implementation

- **Inclusive process (MAs Politics & EC):** when developing European priorities and the Operational Programmes ensure an inclusive consultation process, involving all relevant stakeholders, including small providers of social services, their networks, and social services users.
- **Appraisal criteria (MAs Administrations):** Review the appraisal criteria for applications for subsidies, so that small providers can access funding and get the support that they need to do so.
- **Flexible calls for proposals (MAs Administrations and Politics):** Encourage more flexible calls for proposals that combine different actions, so that they can be complemented with activities tailored to the social services context and ecosystem, and thus create conditions that encourage social and active inclusion (e.g. call for proposals that complement ERDF and ESF+ priorities).
- **Promote calls for smaller grants and/or smaller minimum thresholds (MAs Administrations).**
- **Encourage complementarity between EU funds (MAs Administration and Politics):** Encourage and make easily realisable applications for calls, subsidies, contracts, or financial support agreements that favour complementarity between different project funds used, for example between ERDF and ESF funds for interventions to improve the access to (social) housing or the transformation/refurbishment of housing or investments in climate-friendly heating systems or car fleets.

- **Specific lines of action (MAs Administrations and Politics):** Promote specific lines of action for disadvantaged or marginalised persons and groups, in order to establish objectives and results that are adapted to the various profiles (i.e., there is no provision for children to be defined as a target audience, even though they are the target audience for many social sectors).

## Staff and training

- **Training and support programmes (MAs Administrations):** Establish or extend training and support programmes to help social services providers, especially the smaller ones, to present projects and manage funds. This could be done with the support of sectoral networks, umbrella organisations or platforms.
- **Training and capacity building (MAs Administrations):**
  1. Promote training and capacity building to enable social services providers to better assess the outcome and impact of projects, not least in order to generate a greater culture of evaluation amongst the project partners.
  2. Capacity building initiatives should include specialized and tailored internal training for MAs staff on social impact measurement. This training should provide MAs with tools, methodologies, and best practices to define, measure, and monitor the social impact of funded projects. By strengthening their capacity in this area, MAs can make informed decisions, set realistic targets, and evaluate the effectiveness of projects in achieving desired social outcomes.
  3. Capacity building programs should also focus on equipping MAs with the necessary knowledge and skills to identify, support, and nurture disruptive social innovation projects.

- **Upskilling/reskilling programmes (MAs Administrations):** Promote upskilling/reskilling programmes (such as general vocational education and training (VET) and continuous professional development (CPD) for all professionals working in the field, by encouraging and financing training activities.

## Goals and needs

- **Line of action for social innovation (MAs Politics & EC):** Promote and/or set up a specific line of action for social innovation, with sufficient funding, and that provides financial coverage for scaling up or transferring the innovative projects that are currently being implemented.
- **More qualitative indicators (MAs Administrations):** Incorporate indicators that complement current ones to give more visibility to social aspects (e.g., social inclusion, labour market integration, inclusiveness, accessibility, etc.), to offer a comprehensive view of the results and impacts of a project, and not to forget about the qualitative impact of social services. Indicators that put an emphasis on the impact on the lives of persons supported rather than numbers need to be implemented. Moreover, indicators to prevent segregation should be added and promoted.
- **Goals and results (MAs Administrations):** Set goals and results that are adapted to the needs of those who are most disadvantaged and who face greater obstacles for social and labour market inclusion and for a full participation in our societies, such as people with severe disabilities, homeless persons or migrants, to strengthen the efforts made to avoid their exclusion from the job market and social exclusion.

## Evaluation

- **Indicators (MAs Administrations):** Incorporate indicators that complement current ones to give visibility to social aspects (e.g., social inclusion, labour market integration, inclusiveness, accessibility, segregation, etc.) to offer a comprehensive view of the results and impacts of a project, which cannot be grasped by quantitative indicators. Ensure that the qualitative indicators are properly understood and mastered by the inspectors to ensure a more flexible and fair evaluation.
- **Cost of the evaluation of the results (MAs Administrations & EC):** Ensure that the costs of evaluating results and impact of a project are always an eligible expenditure in the projects.

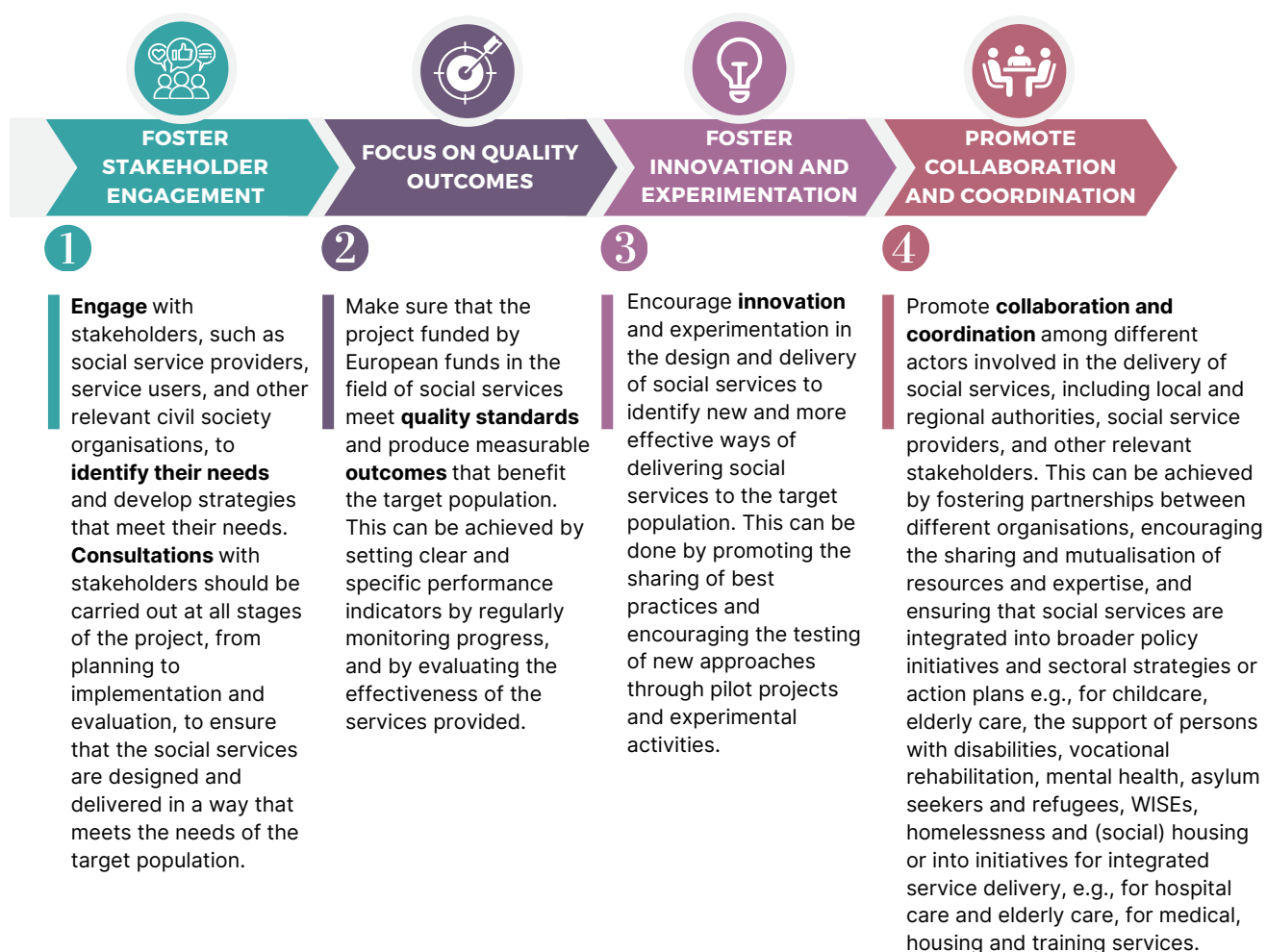


- **Public-private collaboration (MAs Administrations):** Improve existing exchanges between the public bodies and the social services (this can, e.g., be done by organising multi-year annual calls, promoting public tendering and encouraging public-private partnerships, etc.)
- **Simplify management systems (MAs Administrations):** Simplify management systems to reduce bureaucracy and duplication.
- **Improved and regular dialogue (MAs Administrations & EC):** Encourage greater dialogue and participation of relevant networks and platforms in the sector throughout the full cycle of projects, especially in the design and formulation phase of programming EU funds.
- **Greater coordination (EC):** Promote greater coordination among European fund management bodies when setting the appraisal criteria and the management criteria for calls to apply for financial support from EU funds, as well as encouraging greater coordination among the organisations that benefit from the calls.
- **Management tools (MAs Administrations & EC):** Modernise European fund management tools, especially those used by MAs, by developing management tools and applications that favour automation and reduce the focus on management. MAs should collaborate to develop an integrated digital information system that provides a centralized platform for managing and exchanging data related to EU-funded projects. This system should allow MAs to access and exchange project-related data, progress reports, financial information, and other relevant documents. MAs should invest in the development of digital management tools that streamline administrative processes and facilitate project monitoring and evaluation. Moreover, to encourage cross-country cooperation and knowledge sharing, MAs should establish cooperative platforms that facilitate collaboration and exchange of best practices.
- **Coordination among the managing bodies (MAs Administrations & EC):** Promote greater coordination among European fund management bodies when setting the appraisal criteria and the management criteria for calls to apply for financial support, as well as encouraging greater coordination among the organisations that benefit from the calls, in order to establish common management criteria and generate synergies among the managing bodies during the intervention.
- **Improve how existing public-private collaboration instruments are used (MAs Administrations):**
  1. Organise **multi-year calls** to apply for subsidies, and thus reduce the yearly administrative burden.
  2. Increase **public tendering and partnerships** as alternative management formulas, to make the management more stable; in tenders, the cheapest price should not have a dominant weight when it comes to making a choice, as quality criteria and social clauses need be considered in the selection of a project proposal.
  3. Encourage projects to be presented jointly in **collaboration and partnership between different parties**, especially in social innovation projects. The benefit of this approach is illustrated by projects that have been promoted through the Recovery and Resilience Plans.
  4. Implement a **deep involvement of users/experts by experience**.

# PRACTICAL STEPS

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The following is a list of quickly actionable measures MAs can immediately take to ensure ESF+ and ERDF achieve maximum effectiveness and sustainability, in line with the principles of the European Pillar of Social Rights and other relevant laws and policies. The measures aim to cover horizontal issues affecting social services across the European Union. These measures serve as a practical roadmap for achieving optimal outcomes in social services, empowering MAs to address current challenges and promote long-term sustainability of those services and also to support social innovation adapted to specific needs at the local or regional level





## ENHANCE CAPACITY BUILDING AND TRAINING

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Provide **capacity building** and **training** opportunities for social service providers and other relevant actors to ensure that they have the skills and knowledge required to deliver high-quality social services. This can be done by providing training courses, seminars, and other professional development opportunities.



## PARTNERSHIP BUILDING

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To ensure cross-sectoral collaboration, it is essential to build **partnerships with relevant stakeholders across different sectors**. This could involve engaging with representatives from civil society organisations (including local community organisations and user organisations), private sector organizations, public sector agencies, social service providers and employer organisations, and other relevant actors to create a shared understanding of the social issues and of the opportunities for collaboration to improve social, health, education, employment and housing outcomes for those in need of support, guidance, care, etc.



## CO-DESIGN AND CO-CREATION

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Cross-sectoral collaboration should also involve **co-design and co-creation** of projects, programmes, and initiatives. This will ensure that the expertise of all stakeholders is harnessed to develop effective and sustainable solutions that can have a significant impact on social issues.



## SHARED VISION AND VALUES

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Cross-sectoral collaboration can also be achieved by creating a **shared vision and values** that are aligned with the goals and objectives of EU funds for social services. This will help ensure that all stakeholders are working towards the same goals and will facilitate cooperation and coordination across different sectors.



## FLEXIBILITY AND ADAPTABILITY

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Cross-sectoral collaboration requires flexibility and adaptability to deal with the challenges that may arise during the implementation of social service projects. This could involve **adapting to changes** in the political and economic environment, responding to emerging social issues, and adjusting strategies to better meet the needs of beneficiaries.



## COMMUNICATION AND KNOWLEDGE SHARING

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Effective communication and knowledge sharing are critical to cross-sectoral collaboration. This could involve **sharing information, data, and best practices** across different sectors, creating platforms for dialogue and exchange, and leveraging the expertise of different stakeholders to enhance the impact of social service projects.





EU Funds for Social Services

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