HELP DESK
EU Funds for Social Services

Facilitation Toolkit for Social Services Access and Management of ESF+ERDF and other funds

Co-funded by the European Union

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LIST OF ABBREVIATIONS

CPR: Common Provision Regulation
ERDF: European Regional Development Fund
ESF (+): European Social Fund (+)
EU: European Union
ID: Intermediate Body
MA: Managing Authority
NGO: Non-governmental Organisation
SCO: Simplified Cost Option
WISE: Work Integration Social Enterprise

OVERVIEW OF THE TOOLKIT

The Facilitation Toolkit for Social Services Projects has been designed to effectively respond to the pressing administrative and technical challenges encountered at every stage of the project cycle. Its primary focus is to assist Managing Authorities operating at all levels (national, regional, and local) including intermediary bodies and agencies, in the process of accessing and managing funds from ESF+ and ERDF (along with other programmes) for the benefit of social services.

Developed under the Social sErviceS helpdesK on EU Funds project, this toolkit is dedicated to finding solutions and designing tools that simplify access to EU funds. It offers a variety of practical tools, advice, recommendations, templates, and it highlights promising practices from different EU Member States.

The methodology employed for developing the toolkit involved a three-fold approach. Firstly, the process began by gathering evidence through online survey and national evidence-gathering events to understand challenges and opportunities for Managing Authorities and concerns of social services representatives regarding the use of EU funds for the development of social services programmes. This phase aimed to also identify knowledge gaps within the social services sector concerning available funding opportunities and to provide Managing Authorities with insights into how various funding instruments could be leveraged to support social services. This data collection process laid the foundation for the subsequent steps in creating the toolkit.

Secondly, a series of cross-sectoral and sector-specific workshops were conducted. These workshops served as forums for engaging Managing Authorities and social services practitioners in discussions covering a wide range of topics related to social services. The objectives included emphasizing essential principles for the delivery of effective services, establishing a common understanding of regulations, approaches, and tools relevant to project application, implementation, and closure processes. Additionally, the workshops focused on identifying and analysing existing obligations for MAs and Beneficiaries (social services) within the framework of ESF+/ ERDF regulations and CPR (Common Provisions Regulation), and to understand and use different evaluation methods for practices in Programmes to provide evidence of effectiveness to support MAs and Beneficiaries. The toolkit underwent further refinement by incorporating feedback from Managing Authorities who provided valuable input, contributing to the overall improvement of the toolkit. Finally, a piloting event was organised in several EU countries, including Sweden, Italy, Czech Republic, Spain, and Belgium with the objective to test the usability and the relevance of the Toolkit among the national stakeholders.

NAVIGATING THE TOOLKIT: HOW TO USE IT EFFECTIVELY

This facilitation toolkit has been designed to streamline the project management process across seven key thematic areas: Project Application, Partnership and Horizontal Principles, Project Selection and Evaluation, Project Quality and Communication, Budget, Reporting, Follow-up and Sustainability.

The toolkit comprises a variety of templates, spreadsheets, and checklists, enabling users to efficiently navigate the complexities of project facilitation and implement best practices based on sector-specific insights.

TOOLKIT CONTENTS

1. Project Application

Tools that guide you through the project application process, ensuring submission of comprehensive and well-structured proposals. These tools are designed to ensure equal access for all potential applicants. This section also introduces the concept of a 2-step application process, strategically employed to pre-screen project proposals in their early stages, effectively ensuring the reduction of administrative workload.

2. Partnership and Horizontal Principles

This chapter provides a set of guiding questions, templates, and checklists to assist Managing Authorities in orchestrating effective partnerships. By asking the right questions at each stage of the Programme cycle, this toolkit aims at fostering partnerships. It is important to note that these tools primarily pertain to the Programme cycle and not the project level.

3. Project Selection and Evaluation

This chapter contains resources aimed at streamlining the selection and evaluation of project proposals, with a particular focus on introducing a two-step application process within ESF+ programmes that support social services.

4. Project Quality and Communication

This chapter presents tools that facilitate quality control and assurance. It includes recommendations on the procedure of reporting and verification of the reports, on the deadlines for beneficiaries and control bodies and the requirement of information.

5. Project Budget

This chapter discusses Simplified Cost Options (SCOs), which are often usedas a key simplification tool in EU funding. Understanding the diverse range of SCOs is crucial for effective management, but it is important to note that new SCOs can be developed during programme implementation by Managing Authorities.

6. Project Reporting

This chapter addresses the most common issues within the social services sector when dealing with Managing Authorities (MAs) during reporting. It suggests solutions to these issues, highlights common mistakes in on-site checks of EU-funded projects, and offers best practices for MAs.

7. Project Follow-up and Sustainability

A collection of tools designed to facilitate the sustainability of projects within ESF+ and ERDF programmes that support social services.

ACCESSIBILITY

The toolkit has been translated into 10 languages to cater to a global audience. It is available in English, Spanish, Italian, Swedish, Czech, Greek, Slovak, German, Bulgarian and French.

ONLINE RESOURCES

While this toolkit contains a comprehensive set of tools and resources, we encourage you to explore the project's website for additional, in-depth materials. The website is organised into topic-specific folders, making it easy to locate the extensive set of tools that can complement your work.

https://eufunds4social.eu/facilitation-toolkit/

AVAILABILITY

The toolkit is available in two versions:

Shortened Print Version: For those who prefer physical copies, a condensed print version of the toolkit is available.

Extensive Online Version: The full range of tools and resources is available online via the project's website. This digital format provides quick access to all the materials.

APPLICATION PHASE

Tools to Facilitate and Manage EU Funding

BACKGROUND AND RELEVANCE

Generally, social service providers face the following typical challenges and obstacles during the application phase.

Call design:

- Shortage of calls for proposals of wide scope, multidisciplinary approach, and long duration
- Complex and incomprehensible rules, requirements and used language in fragmented call documentation.
- Short deadline for submission of proposals, unrealistic for the proposal documentation required.
- Funding directed to public organisations or large organisations.
- Unrealistic requirements regarding co-financing, horizontal principles, indicators, sustainability:
  - too high co-financing rate while national funding to finance it is not available for social service providers.
  - requirements to comply with horizontal principles or the dimension of those requirements are not applicable or not adjusted to call specificities.
  - the call indicators are not applicable or not measurable and not adjusted to disadvantaged groups.
  - the requirements of long-term sustainability go beyond EU regulation and at the same time not adjusted to the call specificities.

Application process:

- Administrative burden during application, exacerbated by lack of organisational capacity.
- Lack of practical support from Managing Authorities (information, communication, training)

1.1 Social services-inclusive call design tool

TYPE OF TOOL

Checklist for Managing Authorities of ESF+ and ERDF programmes to be applied when designing an open call of social inclusion and innovation to ensure that it gives access to the programme for all relevant potential applicants.

TOOL USER GUIDE

A. Integrate the tool into the call design process as a reminder of what aspects of social service providers are needed to be taken into account.

B. Check the tool's questions before starting the call design and setting up the call design team, especially question 1.

C. Share the tool's questions with the call design team at the beginning of the design work, add additional country- or sector-specific questions to the list, if relevant.

D. Check the pre-final call using the checklist to make sure that all questions can be answered as YES.

CHECKLIST

- Were social service providers and future proposal evaluators involved in designing the call?
- Are social service providers, including both public and non-public organisations, among eligible applicants for the call?
- Does the call use simple, comprehensible language?
- Are the call requirements consistent throughout the call documentation?
- Is the call open for at least 2 months in both Step 1 and Step 2?
- Is the project length determined to fit projects that deal with disadvantaged groups?
- Do the call and the application process use all relevant simplified options to reduce administrative burden? (i.e., minimum number of annexes to be submitted, simplified cost options, comprehensive call documentation, supporting tools for applicants)
- Is there possibility given to cover own contribution by national funding?
- Are all applied horizontal principal requirements relevant to the call?
- Are all applied programme indicators relevant to the call and measurable in the case of disadvantaged groups?
- Are the requirements for long-term sustainability relevant to the call?
  Are they adjusted to the call objectives and specificities?
- Is there support (guidelines, information sessions, webinars, glossary, training etc.) given to applicants regarding the interpretation and practical application of horizontal principles, indicators, sustainability requirements?

SECTORAL APPLICATION OF THE INCLUSIVE CALL DESIGN TOOL - CHECKLIST

This section incorporates feedback from five social service sectors: Services for Child Protection and Families in Poverty, Work Integration, Services for Persons with Disabilities, Poverty and Homelessness, and Services for Older Persons. The tool has been reviewed by experts across these sectors. The gathered feedback highlights its effectiveness in addressing diverse challenges and suggests additional points to the Checklist for Inclusive Call Design to meet sector-specific needs.

- Were social service providers and future proposal evaluators with knowledge of policies, mechanisms and processes in the field of services for older persons / work integration / homelessness / child protection and families in poverty / persons with disabilities involved in designing the call?
- Are social service providers targeting older persons / work integration / homelessness / child protection and families in poverty / persons with disabilities , including both public and non-public organisations, among eligible applicants for the call?
- Are the requirements of the call specifically set up for organisations that work with older persons / work integration / homelessness / child protection and families in poverty / persons with disabilities? Are sufficient consultation opportunities and support for applicants being provided (e.g. training and consultation facilities, opportunities to get feedback on project ideas and drafts, workshops on calls, and opportunities for organisations to network and find partners)?
- Is the call accessible? Use readable language and avoid repeating questions in forms. Also ensure to use language and terms that are commonly used by organisations and workers in the social services sector. Consider creating a clear flowchart diagram with broken down processes for applicants so that they can be easily visualized and understood.
- Does the call cover all priorities of the five sectors, including community-based projects?
- Do the eligible costs reflect the needs of social services and the target group? Are the requirements of the call specifically set up for organisations that work with the project beneficiaries?
- In calls not specifically designed for working with disabled people – does the call contain provisions to include people with disabilities?

1.2 Two-step application process for calls for proposals supporting social services

This section contains a collection of tools designed to facilitate a 2-step application process in ESF+ programmes supporting social services. The tools are mainly addressed to Managing Authorities of ESF+ programmes, especially those that do not use 2-step application process in social inclusion and innovation programmes.

The collection of tools includes:

A. **Checklist for Managing Authorities during programming or prior to call design on using a 2-step application process**
B. **Step 1 Application Form template sample.** *Access the template for download*
C. **Step 2 Application Form template sample.** *Access the template for download*

Tools B and C use the ESF+ standard single-stage Application Form as a basis and draws on the logic of non-ESF+ programmes using 2-stage (2-step) application processes in the 2021–2027 programming period such as the Interreg Danube Transnational Program and the Interreg North-West Europe programme as claimed best practices by social services.

Please note that parallel to this collection of tools, as another pillar of the 2-step application process, a tool collection for the evaluation of proposals in a 2-step application process has been developed under 3.2 Evaluation of project proposals in a 2-step Application process.

A. CHECKLIST FOR DURING PROGRAMMING OR PRIOR TO CALL DESIGN ON USING A 2-STEP APPLICATION PROCESS

The tool helps to decide whether a 2-step application process is the most suitable application process type for the planned call. Answering YES to question 1. and min 50% of the questions indicates that a 2-step application process is highly recommended to use to reduce the workload of both applicants and the Managing Authority/ Intermediary Body.

The tool is to be used when the decision on the application process type is made, whether it is during the programming or the call design period (country-dependant).

TOOL USER GUIDE

A. Integrate the tool into the programming/call design process to ensure that the most suitable application process type is chosen.
B. Optionally, add country- or sector-specific questions to the list.
C. If the answer is YES to question 1 and min. 50% of the questions, choose a 2-step application process.

CHECKLIST

- **Is the call within the scope of social services?**
- **Is the call expected to involve the submission of supporting documents to verify applicants' operative, financial capacity and project work plan?**
- **Are many proposals expected? (The definition of a large number depends on the capacities of the Managing Authority)**
- **Is the expected number of granted projects much lower (e.g., less than 50%) than the expected number of project proposals?**
- **Is there usually a need for quality assurance in the planned call?**
- **Is the call expected to grant projects of long duration?**
- **Country-specific or sector-specific questions can be added.**
- **If the answer is YES to question 1 and min. 50% of the questions, choose a 2-step application process.**

B. STEP 1 ESF+ APPLICATION FORM TEMPLATE SAMPLE

When a 2-step application process is chosen in an ESF+ call, especially one supporting social inclusion and innovation, the Application Form template can be used as a sample in Step 1, adapted as necessary to the nationally used Application Form.

TOOL USER GUIDE

The template sample follows the structure of the single-stage standard ESF+ application form template. National application forms with a different structure should modify the template accordingly but keep its purpose and logic.

Purpose and logic of Step 1:

- Step 1 should include sections on project relevance, project partnership, project general and specific objectives, and a description of main planned activities and how they relate to Programme indicators.
- Step 1 should only inquire about the total budget and budget broken down by partners.
- Step 1 should only require annexed documents to check the eligibility of the Lead Partner and if this information can be gathered from public data, no annex should be asked for.
- Step 1 should allow all sections to be changed in Step 2, except for:
    - Project title and acronym
    - Lead Applicant
    - Targeted call objective, project general objectives and main target group(s)
    - Total project budget can only be changed by max 30% in Step 2

Please refer to the template sample of the Application Phase section available in the online version.

C. STEP 2 ESF+ APPLICATION FORM TEMPLATE SAMPLE

When a 2-step application process is chosen in an ESF+ call, especially one supporting social inclusion and innovation, the Application Form template can be used as a sample in Step 2, adapted as necessary to the nationally used Application Form.

TOOL USER GUIDE

The template sample follows the structure of the single-stage standard ESF+ application form template. National application forms with a different structure should modify the template accordingly but keep its purpose and logic.

Purpose and logic of Step 2:

- In Step 2 every section of the application form can be changed except for:
  - Project title and acronym
  - Lead Applicant
  - Targeted call objective, project general objectives and main target group(s)
  - Total project budget can only be changed by max 30%.
- Step 1 Activities should be complemented by milestones and deliverables.
- Budget should allow simplified cost options.

Please refer to the template sample of the Application Phase section available online.

SECTORAL APPLICATION OF THE TWO-STEP APPLICATION PROCESS

The Two-Step Application Process has been reviewed by experts across the five social services sectors: Services for Child Protection and Families in Poverty, Work Integration, Persons with Disabilities, Poverty and Homelessness, and Older Persons. The gathered feedback suggests the following improvements to meet sector-specific needs.

- More conditionality: For deciding on one- or two-phase application process, the following questions could be added:
  - o Is the call designed for consortiums, possibly including small organisations?
  - o Were the sectoral stakeholders consulted and did they confirm the relevance of a 2-step process for the specific call?
- Time Adequacy: Ensure that the application process allows ample time for the submission of applications in each phase.
- More accessibility: Transparency and clarity of the selection criteria needs to be guaranteed, requiring training and support to MA's. The language used should be more accessible.
- More incentives: Measures should be taken to encourage innovation and to secure Intellectual Property Rights. Rewarding applications for getting to the second phase (even if not approved for further steps) should be considered. It is important to create possibilities for smaller and new organisations to contribute, for instance by providing consortium-based funding and providing incentives and support for small organisations. In the case of the work integration sector, it is recommended that calls dedicated to social enterprises are considered.
- Infrastructure Funding for Poverty and Homelessness Initiatives: Systematic inclusion of "infrastructure" among the eligible costs of calls to combat poverty and homelessness. This item may include costs related to the improvement and renovation of existing facilities, and the purchase of furniture and materials for furnishing them.
- Consulting social services: incorporate consultation processes prior to the issuing of the call or co-design the call-in collaboration with representatives of social services and relevant third sector bodies.
- Innovation Emphasis in proposals for Addressing Poverty and Homelessness: scaling down of innovation as a primary evaluation criterion for proposals related to poverty and homelessness.

PARTNERSHIP AND HORIZONTAL PRINCIPLES

Tools to Facilitate and Manage EU Funding

BACKGROUND AND RELEVANCE

The tools related to the partnership and horizontal principles aim to help Managing Authorities to organise effective partnerships by asking the right questions at each stage of the Programme cycle (design, implementation, monitoring and evaluation phases), in compliance with the obligations set out in the CPR (Common Provisions Regulation) and ECCP (European Code of Conduct on Partnership). These tools can also help Managing Authorities to reflect on and identify additional categories of partners not foreseen in the CPR and ECCP, whose involvement would give an added value to the design, implementation, monitoring, and evaluation of the policy objectives of each Programme. For example, reflecting on which additional categories of partners to include in the partnership can be very useful in case a Programme covers social service provision, as social service providers are not mentioned in the indicative list of partners mentioned in the CPR and ECCP. These tools are mainly related to the Programme cycle and not to the project level.

This section introduces a collection of tools that will support Managing Authorities to select and engage the relevant partners across the different phases of program development: programme analysis and design, programme implementation, monitoring and evaluation, implementation of horizontal principles, as well as some tools for partners or project promoters. In the following, you will find:

- Tool to plan which stakeholders to engage in the different stages of Programme preparation.
- Tool to assess the degree of the gender relevance of a Programme/project to support the practical implementation of gender equality as a horizonal principle.

The comprehensive list of tools for engaging with partners is accessible online. These tools cover various stages, including programme analysis and design, implementation, monitoring and evaluation, capacity building. They also support project promoters in working effectively in partnership and implementing horizontal principles.

2.1 Tool to plan which stakeholders to engage in the different stages of Programme preparation

TYPE OF TOOL

Guiding questions and checklists for Managing Authorities, policy makers, and practitioners to identify which key stakeholders are important to involve in the Programme analysis and design process, thus benefitting from their knowledge and expertise.

1. **TO ENSURE THAT THERE IS DIVERSITY IN PARTNER SELECTION, INDICATE IN THE FOLLOWING GRID THE NAME OF THE ORGANISATIONS THAT YOU ARE PLANNING TO INVOLVE, TO ASSESS IF ANY STAKEHOLDER GROUP IS MISSING, UNDER OR OVERREPRESENTED IN THE PARTNERSHIP. ASSESS IF THERE IS ROOM OF INNOVATION IN CHOICE OF PARTNERS, OR IF IT IS ALWAYS THE SAME ORGANISATIONS BEING REPRESENTED.**

PARTNERS	NO	MISSING	HARDLY INVOLVED	OVER-EPRESSSENTED	WELL OVER-REPRESENTED
A) REGIONAL, LOCAL, URBAN AND OTHER PUBLIC AUTHORITIES					
Regional authorities					
Local authorities					
Urban authorities (PS Cities and metropolitan areas)					
Other public authorities, including those responsible for horizontal principles and the implementation of equal treatment					
B) ECONOMIC AND SOCIAL PARTNERS					
Representatives from business organisations or chambers of commerce					
Representatives from the social partners, i.e. employers' organisations and trade unions, including those representing SMEs and social economy organisations					
C) RELEVANT BODIES REPRESENTING CIVIL SOCIETY, SUCH AS ENVIRONMENTAL PARTNERS, NON-GOVERNMENTAL ORGANISATIONS, AND BODIES RESPONSIBLE FOR PROMOTING SOCIAL INCLUSION, FUNDAMENTAL RIGHTS, RIGHTS OF PERSONS WITH DISABILITIES, GENDER EQUALITY AND NON-DISCRIMINATION					
Environmental partners					
Non-governmental organisations responsible for promoting social inclusion and fundamental rights					
Non-governmental organisations responsible for promoting rights of persons with disabilities					
Non-governmental organisations responsible for promoting gender equality and non-discrimination					

PARTNERS	NO	MISSING	HARDLY INVOLVED	OVER-EPRESSSENTED	WELL OVER-REPRESENTED
Other organisations or groups which are significantly affected or likely to be significantly affected by the implementation of the ESI Funds, in particular groups considered to be at risk of discrimination and social exclusion					
Bodies representing local action groups					
D) RESEARCH ORGANISATIONS AND UNIVERSITIES, WHERE APPROPRIATE					
Research organisations and universities					
Additional partners					
Youth organisations					
Women organisations					
Non-profit organisations representing migrants					
Networks, coalitions and partnerships focusing on specific areas relevant to the investment priorities chosen					
Social service providers (from the public, private, non-profit and social economy sectors)					
General public					
Others, please specify					

2. HOW ARE YOU PLANNING TO INVOLVE THE DIFFERENT STAKEHOLDER GROUPS IN THE DEVELOPMENT OF PROGRAMMES?

PARTNERS	DRAFTING	REVIEWING / DISCUSSING	PUBLIC CONSULTATION	RECEIVING INFORMATION	NONE
A) REGIONAL, LOCAL, URBAN AND OTHER PUBLIC AUTHORITIES					
regional authorities					
local authorities					
urban authorities (ps cities and metropolitan areas)					
other public authorities, including those responsible for horizontal principles and the implementation of equal treatment					
B) ECONOMIC AND SOCIAL PARTNERS					
representatives from business organisations or chambers of commerce					
representatives from the social partners, i.e. employers' organisations and trade unions, including those representing smes and social economy organisations					
C) RELEVANT BODIES REPRESENTING CIVIL SOCIETY, SUCH AS ENVIRONMENTAL PARTNERS, NON-GOVERNMENTAL ORGANISATIONS, AND BODIES RESPONSIBLE FOR PROMOTING SOCIAL INCLUSION, FUNDAMENTAL RIGHTS, RIGHTS OF PERSONS WITH DISABILITIES, GENDER EQUALITY AND NON-DISCRIMINATION					
environmental partners					
non-governmental organisations responsible for promoting social inclusion and fundamental rights					
non-governmental organisations responsible for promoting rights of persons with disabilities					

PARTNERS	DRAFTING	REVIEWING / DISCUSSING	PUBLIC CONSULTATION	RECEIVING INFORMATION	NONE
non-governmental organisations responsible for promoting gender equality and non-discrimination					
other organisations or groups which are significantly affected or likely to be significantly affected by the implementation of the esi funds, in particular groups considered to be at risk of discrimination and social exclusion					
bodies representing local action groups					
D) RESEARCH ORGANISATIONS AND UNIVERSITIES, WHERE APPROPRIATE					
research organisations and universities					
additional partners					
youth organisations					
women organisations					
non-profit organisations representing migrants					
networks, coalitions and partnerships focusing on specific areas relevant to the investment priorities chosen					
social service providers (from the public, private, non-profit and social economy sectors)					
general public					
others, please specify					

3. AT WHICH STAGE IN THE DRAFTING PROCESS DO YOU INTEND TO INVOLVE PARTNERS?

STAGES	YES/NO	HOW	LESSONS LEARNED FROM PREVIOUS EXPERIENCES
The analysis and identification of need			
The definition of selection of priorities and related specific objectives			
The allocation of funding			
The definition of programme's specific indicators			
The implementation of the horizontal principles			
The composition of the monitoring committee			
Partners are not involved in the drafting process			
Do not know			

2.2 Tool to assess the degree of the gender relevance of a Programme/ project

TYPE OF TOOL

Decision tree to assess the extent to which/in which way a Programme/project has gender relevance. It gives tips on to consider the best way to address the gender relevance throughout the Programme/project.[1]

Can you identify all the groups of people who will be impacted by the Programme/ project? This includes both those involved in the delivery of the Programme/project and the users.

Examples: In a Programme/project aimed at redesigning the urban space and mobility, this will address the Managing Authority, the architects, the urban space and transport departments, and the local population.

NO

Engage with 'partners' (in the meaning of CPR), potential project promoters and samples of users to understand who will be affected by the Programme/ project, and how. If you are not sure, you can carry out a needs assessment and a stakeholder consultation to plan your approach.

Example: An open consultation may be held with public transport users to identify any gendered impacts prior to designing new mobility schemes.

YES

1 This tool is a readaptation of tool 3 contained in EIGE, Gender-responsive public procurement. Step-by-step toolkit

YES

Will women and men/girls and boys be impacted differently by the Programme/ project? This may include impacts during delivery itself (e.g., equal pay for employees) or its outputs/outcomes (e.g., design of urban space and mobility such as lighting, architectural barriers which will affect men and women differently).

Note: If the Programme/project regards a sector with a significant gender gap in terms of pay or participation, you can assume the Programme/project will have gender relevance.

YES

The Programme/project has gender relevance. You should consider the best way to address this through the Programme/project cycle, setting requirements, objectives to be achieved, targets, indicators, etc. that take into account the gender perspective.

Example: In a call for proposals, you can encourage applicants to ensure gender balance to the extent as possible as one of the criteria for the operational capacity. You can also ask applicants to carry out a gender analysis in relation to the expected outcomes of the project.

NO

The outcomes/outputs of the Programme/ project may not have gender relevance. It is still relevant to consider:

- how to increase gender balance in the teams delivering the Programme/ project;
- how to ensure that there is gender balance among the representatives of the stakeholders participating in the preliminary consultations.
- how to ensure that gender-sensitive communication is applied in preparing the Programme documents/ calls for proposals.

In addition to the above ways of addressing gender in the Programme/ project:

i) you should make use of gender disaggregated data in monitoring and reporting; and

ii) you should consider how to ensure that gender-sensitive communication is applied in preparing the Programme documents/ call for proposals/ communication activities during Programme and project implementation.

SECTORAL APPLICATION OF PARTNERSHIP AND HORIZONTAL PRINCIPLES

This section incorporates feedback from five social service sectors: Services for Child Protection and Families in Poverty, Work Integration, Persons with Disabilities, Poverty and Homelessness, and Older Persons. The tools from the partnership and horizontal principles have been reviewed by experts across these sectors. The gathered feedback in the following suggests ongoing improvement to meet sector-specific needs.

- Exchange and Matchmaking Opportunities: creation of exchange and matchmaking events facilitated by Managing Authorities, either in-person or online to promote information sharing among organisations operating in the same territories or addressing similar topics.
- Sensitisation and Capacity-Building: sensitisation and capacity-building for the use of internal organisation tools by potential beneficiaries. This may involve the use of draft documents to gather partners around a project idea, fostering collective feedback and alignment with official project templates.
- Maintaining Engagement and Participation of beneficiaries:
  - Foster continuous communication through various channels.
  - Emphasise tangible outputs of EU funded projects to demonstrate programme's progress.
  - Reinforce goals and objectives with robust action plans.
  - Cultivate an open and transparent atmosphere.
  - Provide clear leadership to promote participation.
  - Strengthen relationships through informal activities.
  - Mentor beneficiaries facing resource or experience challenges. Value all beneficiaries' contributions equally.
- Dealing with Disengaged Beneficiaries
  - Initiate bilateral discussions to understand reasons for non-compliance.
  - Consider reallocating roles and tasks within the funded project.
  - Offer project management skills training if needed.
  - Provide capacity building for resource-limited beneficiaries.
  - Enable peer support with more experienced beneficiaries.
  - Address transparency, power imbalances, and communication issues.

PROJECT EVALUATION AND SELECTION

Tools to Facilitate and Manage EU Funding

BACKGROUND AND RELEVANCE

Generally, social service providers face the following challenges and obstacles during the evaluation phase.

- Lack of information or training sessions on evaluation.
- Unclear language used in evaluation grid.
- Delayed results of evaluation.
- Lack of consistency between the application form and the evaluation criteria, making self-assessment impossible.
- Lack of alignment between the scoring and the objectives and priorities of the call Lack of expertise of the evaluators in the field of social services, leading to non-accurate evaluation reports Lack of communication during the stages of evaluation.

3.1 Guidelines for Managing Authorities on the evaluation of calls targeting social services

TYPE OF TOOL

Guidelines for Managing Authorities of ESF+ and ERDF programmes.

TOOL USER GUIDE

The tool is to be applied during call design when developing the evaluation process and evaluation grids of an open call of social inclusion and innovation to ensure that it gives access to the programme for all relevant potential applicants.

- Integrate the tool into the call and evaluation design process as a reminder of what aspects of social service providers need to be taken into account.
- Check the tool before starting the call design, and plan the call documentation, the applicant supporting services and the evaluation accordingly.

GUIDELINES

1. Make sure that the objectives, priorities, and expected results of the call are the ones focused on in the evaluation grid and its scoring.
2. Make sure the Application Form is in line with the evaluation grid, i.e., each evaluation criterion can be matched with the Application Form sections.
3. To facilitate the comprehension of call requirements, make sure that the evaluation grid also uses layman language, just like other parts of the call documentation (glossary should be provided where necessary).
4. Make sure that evaluators have tested and assessed the application form, the evaluation grid, and its scoring during the design of the call.
5. Make sure that evaluators are trained on the thematic area as well, not just the evaluation procedure and methodology.
6. Make sure that information or training sessions are provided on the evaluation of the proposals and the evaluation criteria, specifically targeting small or less experienced organisations.
7. Ensure clear and foreseeable communication throughout the evaluation process, preferably integrated into the electronic application system.

3.2 Evaluation of project proposals in a 2-step application process of calls targeting social services

This tool, addressed to Managing Authorities of ESF+ programmes, especially those that do not use 2-step application process in social inclusion and innovation programmes, aims to facilitate the selection and evaluation of project proposals in a 2-step application process in ESF+ programmes supporting social services.

A. EVALUATION GRID OF PROPOSALS IN A 2-STEP APPLICATION PROCESS - STEP 1

TOOL USER GUIDE

When a 2-step application process is chosen in an ESF+ call, especially one supporting social inclusion and innovation, the following evaluation grids can be used in Step 1, adapted as necessary to the nationally used evaluation grids.

The evaluation grids are in line with the ESF+ 2-step Application Form template samples provided in the Application Phase section.

Step 1

- To reduce administrative burden, in Step 1 the eligibility of applicants should only be checked for the Lead partner (other partners can be changed between Step 1 and 2). Supporting documents to verify the Lead partner's eligibility should only be requested if the information cannot be obtained from public data.
- In Step 1 – in line with Application Form – the project's proposed partnership, objectives, relevance, concept, given solutions, ambition and expected results are to be evaluated.
- Step 1 Evaluation procedure should be simplified with shorter evaluation period and an Evaluation Committee deciding which proposals are recommended for Step 2.
- Step 1 evaluation should give recommendations to applicants on how to further develop and improve the projects, whether the project moves on to Step 2 or not.
- In the award criteria grid, the sections to be checked in the Application Form can be optionally given, which would allow for self-assessment of proposals.
- Winning project concepts in Step 1 should be offered an information session (Applicants – Managing Authority – evaluators/member of the Evaluation Committee), where the outcome of the evaluation and given recommendations can be discussed to further improve the quality and impact of the project and to significantly reduce the number of rejected projects in Step 2.
- Evaluation grids should be adapted to or complemented with national legislative and call requirements.

EVALUATION GRIDS - STEP 1

Eligibility criteria

CRITERIA 1-4 ARE GATEWAY CRITERIA; PROPOSALS CAN ONLY MOVE ON TO ASSESSMENT AGAINST AWARD CRITERIA IF FULFILLED UPON SUBMISSION.

	ELIGIBILITY CRITERIA	DESCRIPTION
1	The application was submitted on time. If an it tool is used for the submission of proposals, it should be automatically checked.	By the deadline set in the call for proposals.
2	All sections of the application are correctly filled in. (There is no incorrect information, e.G., "To be added later".) If an it tool is used for the submission of proposals, it should be automatically checked.	All fields in the application form are mandatory.
3	The lead partner is an eligible organisation.	To be verified during eligibility check. Programme to decide the rules, e.G., Legal status, territorial eligibility etc. Use the eu arachne tool, if applicable.
4	Supporting documents to verify eligibility of Lead partner are attached, where applicable. If an IT tool is used for the submission of proposals, it should be automatically checked.	Not applicable when automatic check is possible (it can be verified based on publicly available data).

Award criteria

Eligible Step 1 applications will be assessed against the following assessment criteria. Scoring given as an example in the grid below is indicative and should be adapted to national practice. Scoring methodology should be made public and transparent in each call.

CRITERIA		SECTIONS TO BE CHECKED IN THE APPLICATION FORM (OPTIONAL)	SCORING
RELEVANCE			40%
1.	How well is a need for the project justified?		
2.	How well does the proposed project contribute to the programme's objectives?		
PARTNERSHIP			30%
3.	To what extent is the partnership structure relevant for the proposed project?		
IMPACT			30%
4.	How well and to what extent does the project contribute to the expected results of the programme?		

B. EVALUATION GRID OF PROPOSALS IN A 2-STEP APPLICATION PRO6CESS – STEP 2

When a 2-step application process is chosen in an ESF+ call, especially one supporting social inclusion and innovation, the following evaluation grids can be used in Step 2, adapted as necessary to the nationally used evaluation grids. The evaluation grids are in line with the ESF+ 2-step Application Form template samples above.

TOOL USER GUIDE

Step 2

- To reduce administrative burden, supporting documents to verify the applicants' operational and financial capacity should only be requested if the information cannot be obtained from public data.
- Eligibility check should provide room for resubmission of missing, non-technical documents (if applicable).
- In the award criteria grid, the sections to be checked in the Application Form can be optionally given, which would allow for self-assessment of proposals.
- Evaluation grids should be adapted to or complemented with national legislative and call requirements.

EVALUATION GRIDS - STEP 2

Eligibility criteria

CRITERIA 1–4 ARE GATEWAY CRITERIA; PROPOSALS CAN ONLY MOVE ON TO ASSESSMENT AGAINST AWARD CRITERIA IF FULFILLED UPON SUBMISSION. CRITERIA 5-6 CAN BE REQUESTED TO BE FULFILLED DURING ELIGIBILITY CHECK.

	ELIGIBILITY CRITERIA	DESCRIPTION
1	The application was submitted on time. If an it tool is used for the submission of proposals, it should be automatically checked.	The application was submitted by the deadline set in the call for proposals.
2	All sections of the application are correctly filled in. (There is no incorrect information, e.G., “To be added later”.) If an it tool is used for the submission of proposals, it should be automatically checked.	All fields in the application form are mandatory.
3	All project partners are eligible organisations.	To be verified during eligibility check. Programme to decide the rules, e.G., Legal status, territorial eligibility etc. Use the EU ARACHNE tool, if applicable.
4	Lead partner remains unchanged from step 1 to step 2 (including lead partner). If an it tool is used for the submission of proposals, it should be automatically checked.	Lead partner must remain unchanged between the two application phases.
5	Supporting documents to verify eligibility of project partners are attached, where applicable. If an it tool is used for the submission of proposals, it should be automatically checked.	Not applicable when automatic check is possible (it can be verified based on publicly available data). It should be requested to be submitted during the eligibility check if not fulfilled upon project proposal submission.
6	All required annexes are submitted. If an it tool is used for the submission of proposals, it should be automatically checked.	It should be requested to be submitted during the eligibility check if not fulfilled upon project proposal submission.

Award criteria

Eligible Step 2 applications will be assessed against the following assessment criteria. Scoring given as an example in the grid below is indicative and should be adapted to national practice. Scoring methodology should be made public and transparent in each call.

	AWARD CRITERIA AND QUESTIONS	SECTIONS TO BE CHECKED (OPTIONAL)	SCORING
RELEVANCE (MIN SCORE: 15, MAX SCORE: 30)			
1.	Project relevance • How well is a need for the project justified? • To what extent will the project contribute to the Programme/ call objectives? • How does the project go beyond the current situation and build on existing practices?		
2.	Project intervention logic • To what extent are the identified problems, needs and proposed solutions logical and interrelated? • To what extent is the project intervention logic clear and consistent? • To what extent is the project intervention logic plausible?		
TOTAL SCORING OF RELEVANCE CRITERIA			
QUALITY – PROJECT DESIGN (MIN SCORE: 10, MAX SCORE: 25)			
3.	Methodology • To what extent are the proposed methodology and concept appropri-ate for the achievement of the project results? • To what extent is the proposed monitoring and evaluation methodology appropriate to the measurement of the project results?		
4.	Work plan and timetable • To what extent is the work plan relevant, realistic, consistent, and coherent? Do proposed activities and deliverables lead to planned outputs and results? Are project outputs and results realistic and do they contribute to Programme / call indicators? • To what extent are the proposed project timeframe and timetable realistic and feasible?		

	AWARD CRITERIA AND QUESTIONS	SECTIONS TO BE CHECKED (OPTIONAL)	SCORING
5.	Budget • To what extent is the project budget used in accordance with the principles of economy, efficiency, and effectiveness? ▪ The principle of economy means minimising the costs of resources. The resources used by the project partnership for its activities should be made available in due time, in appropriate quantity and quality, and at the best price. ▪ The principle of efficiency means getting the most from the available resources, the relationship between resources employed and outputs delivered in terms of quantity, quality, and timing. The need for external expertise is justified and the costs seem realistic. ▪ The principle of effectiveness means meeting the objectives and achieving the intended results. The budget is transparent and proportionate to the proposed work plan, project outputs and results. • Are the applied simplified cost options appropriate and in line with the call rules?		
6.	Communication and dissemination • To what extent are communication and dissemination activities appropriate to reach the relevant target groups and stakeholders?		
7.	Horizontal principles • Does the project make a positive contribution on equal opportunities and non-discrimination? • Does the project make a positive contribution on equality between men and women and gender mainstreaming? • Does the project make a positive contribution on sustainable development?		
TOTAL SCORING OF QUALITY – PROJECT DESIGN CRITERIA			
QUALITY - PROJECT PARTNERSHIP AND CONSORTIUM COORDINATION (MIN SCORE: 10, MAX SCORE: 25)			
8.	Partners and cooperation • To what extent is the partnership composition relevant for the proposed project? • To what extent do project partners have proven experience and competence in the thematic field, as well as necessary capacity (organisational, financial) to implement the project? • What added value does cooperation bring?		
9.	Partner roles and consortium management • To what extent do the proposed project and risk management methods contribute to the achievement of the project results? • Do all partners play a defined role, which is relevant to the project implementation? • Is the distribution of tasks appropriate?		

	AWARD CRITERIA AND QUESTIONS	SECTIONS TO BE CHECKED (OPTIONAL)	SCORING
TOTAL SCORING OF QUALITY – PROJECT PARTNERSHIP AND COORDINATION CRITERIA			
IMPACT (MIN SCORE: 8, MAX SCORE: 20)			
10.	• To what extent will project outputs/results have a long-term impact beyond project lifetime (i.e., on target groups)? • To what extent are project results sustainable? • To what extent are project main outputs replicable/transferable to other organisations/regions?		
TOTAL SCORING OF IMPACT CRITERIA			

The minimum score to be granted is 60 points and minimum scores of subcategories must be attained as well.

SECTORAL APPLICATION OF THE PROJECT EVALUATION & SELECTION

The Project Evaluation & Selection topic has been reviewed by experts across the five social services sectors: Services for Child Protection and Families in Poverty, Work Integration, Persons with Disabilities, Poverty and Homelessness, and Older Persons. The gathered feedback suggests ongoing improvement to meet sector- specific needs such as:

- Transparent Evaluation Criteria: Make sure that evaluation criteria are public and easily accessible by the possible applicants.
- Alignment of Objectives and Evaluation Criteria: Make sure that the objectives, priorities, and expected results of the call are the ones focused on in the evaluation grid and its scoring.
- Coherence with Application Form: Make sure the Application Form is in line with the evaluation grid, i.e., each evaluation criterion can be matched with the Application Form sections.
- Specific Scoring Criteria: Make sure the scoring criteria are smart and specific. The criteria should also provide for sector-specific issues – for Sectoral Application of the Project Evaluation & Selection disabilities with higher support needs, it should be taken into account that more time, support and thus resources may be needed to have a positive impact and enhance the quality of life (these costs cannot be simply compared to costs of similar activities in projects with other target groups).
- Accessible Language in Evaluation Grid: To facilitate the comprehension of call requirements, make sure that the evaluation grid also uses layman language, just like other parts of the call documentation (glossary should be provided where necessary).
- Evaluator Involvement in Design: Make sure that evaluators have tested and assessed the Application Form, the evaluation grid, and its scoring during the design of the call.
- Clarity in Scoring Guidelines: Make sure the scoring guidelines provide a clear insight on how to score each of the criteria.
- Thematic Area Training for Evaluators: Make sure that evaluators are given training on the thematic area as well, not just the evaluation procedure and methodology.
- Inclusive Training Sessions: Make sure that information or training sessions are provided on the evaluation of the proposals and the evaluation criteria, specifically targeting small or less experienced organisations.
- Clear Communication Throughout: Ensure clear and foreseeable communication throughout the evaluation process, preferably integrated into the electronic application system.
- Inclusive Selection Criteria: Ensure that the selection criteria always cover accessibility and inclusivity of projects (in all types and sectors of calls).

PROJECT QUALITY AND DISSEMINATION

Tools to Facilitate and Manage EU Funding

PROJECT QUALITY

Quality assurance is one of the key aspects of EU funded projects and Managing Authorities (MAs) are responsible for maintaining high quality in every single project funded. However, projects in social services often miss a common framework on quality management and evaluation and this later creates many challenges for MAs to fairly monitor and evaluate the projects from the quality point of view. Within the quality assurance process, it is important to collect feedback from project coordinators and partners. This should cover both project progress and overall dynamic regarding content and quality of cooperation. It is therefore quite different from monitoring reports, which focus on measurable progress vis-à-vis project application.

This section introduces two distinct tools for the project quality area: The Quality Assurance Management and Evaluation (QAME) framework Tool is available in full detail online and a Checklist for defining a measurable and result oriented project presented below.

4.1 Defining a measurable result-oriented project

TYPE OF TOOL

Checklist for Managing Authorities (of all EU funded projects) defining a measurable and result oriented project. Managing Authorities (MAs) can define what outputs and impacts are expected from funded projects. A checklist to be shared with applicants and beneficiaries.

TOOL USER GUIDE

The checklist can be used on both programme and project level. The MA can use it to define and evaluate the intervention logic of the projects and the applicants and beneficiaries can use it to design a feasible and impact-oriented project.

INTRODUCTION

A key step in project development and something that project ideas should work on in a very early stage is defining the results (the change) they are aiming for. The checklist for defining a measurable result-oriented project is a tool that will assist project applicants in making sure the right questions are asked at the right moment. The purpose of the tool is that applicants can propose concrete and measurable results in the stage of Concept Note submission.

When developing a project, it is important to first define the change the project wishes to bring about, meaning the main result and the thereto related project main objective. All partners need to agree on what the project wants to change precisely to improve the present situation. When this change (so the result and the related objective) is clear and projects have made sure that this is something that can be supported within the 2 Seas Programme, applicants should move on to define the precise outputs for the project. What concrete products do partners need to deliver in order to obtain the change they are aiming for?

Only when these are clear, the partnership should start thinking about how to measure the change these outputs will bring about. The exercise of identifying clear project main and specific results and proposing a methodology in order to measure them is not an easy one. Applicants are therefore advised to work with the Network of Territorial Facilitators who can guide them in the different steps of defining a measurable result.

IN SHORT, THERE ARE FOUR KEY QUESTIONS THAT A PROJECT SHOULD ASK ITSELF.

1. Am I able to identify the specific results from each of my proposed outputs?
2. Am I sure that the project main result(s) is/are in line with the Programme expected result?
3. Will I be able to define a robust methodology in order to measure the change my results will bring about?
4. Are my results measurable?

The checklist for defining a measurable result-oriented project below means to help applicants in finding an answer to these four questions. There are some examples included on page 40 of the document which are not exhaustive but can help applicants in defining the measurable results for their projects.

☑ Tick off the box if the answer is (yes)

DEFIME OBJECTIVE

WHAT DO I WANT TO CHANGE WITH MY PROJECT?

☐ 1. I can say "I want to increase / decrease..." to improve the present situation (baseline).

☐ 2. The project main objective is in line with the programme specific objective.

☐ 3. I can explain the project main objective through the project specific objectives.

DEFINE OUTPUT

WHAT CAN I DO AND DELIVER TO ACHIEVE THE OBJECTIVE?

☐ 4. I can identify a set of activities to reach the project main objective and specific objectives.

☐ 5. My project activities produce a set of outputs to reach the project objectives.

☐ 6. My project outputs clearly link to the defined programme outputs.

DEFINE MEASUREABLE RESULT

WHAT MEASURABLE CHANGE DO MY OUTPUTS BRING ABOUT?

☐ 7. I can identify the specific result from each output.

☐ 8. I am sure the project main result/s is/are in line with the pro- gramme expected result.

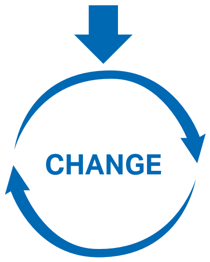
☐ 9. I can explain the project main objective through the project specific objectives.

☐ 10. I have made my project results measurable.

7. I CAN IDENTIFY THE SPECIFIC RESULT FROM EACH OUTPUT.

indicate the main intended change derived from the "use" of project specific outputs:

PROJECT SPECIFIC OUTPUT



Project results are not the sum of outputs:

~~OUTPUT~~
~~+ OUTPUT~~
~~+ OUTPUT~~
~~PROJECT RESULT~~

8. I AM SURE THE PROJECT MAIN RESULT/S IS/ARE IN LINE WITH THE PROGRAMME EXPECTED RESULT.

Detail the expected results of the specific objective. See the programme section 2.A.5 of each priority axis ("Results that seek to achieve with Union support")

Refer to various types of change:

- Networking
- Knowledge
- Socio-economic
- Governance and Policy
- Environmental

Define project main result from the specific results:

PROJECT SPECIFIC RESULT	+	PROJECT SPECIFIC RESULT	+	PROJECT SPECIFIC RESULT	=	PROJECT MAIN RESULT

9. I KNOW THE PRESENT SITUATION AND I CAN DEFINE A ROBUST METHOD TO MEASURE THE CHANQE OVERTIME.

Both ad hoc project sources (surveys) and existing statis- tics are suitable.

Review existing sources at CBC level (if any).

The measurement will be carried out overtime.

Decide how regularly information will be provided.

Decide who is responsible of collecting information for measuring the result.

Organize data collection in each “country” part.

Assess the acceptability of costs.

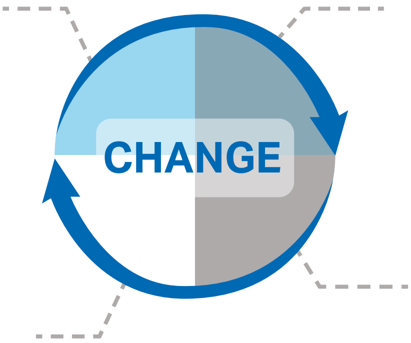
Remember measurements should compare the situation before and after the project

10. I HAVE MADE MY PROJECT RESULTS MEASURABLE.

When relevant and possible, my project result indicates some of the following features:

SIZE (E.G. NUMBER, % OF INCREASE)

Immediate change (at the project end) Or/and sub- sequent change (sometime after the end)



Target group benefiting from the change (e.g. firms, public authorities, end-users...)

Sector / territory of the change

EXAMPLES

This list is not exhaustive, should be adapted to each project situation and does not ensure the project approval.

CLUSTER DEVELOPMENT
Durability of cluster connections / Increased cluster size / Increased integration of activities among the partners

INCREASED AWARENESS / PUBLIC ACCEPTANCE
Index of awareness (survey)
INCREASED SKILLS AND CAPACITIES
% people (e.g. workers) increasing their skills
STAKEHOLDERS' BEHAVIOURAL CHANGE
Companies, NGOS, other actors changing their behaviour

ECO-EFFICIENCY GAIN
Reduced energy consumption or increased efficiency (Ktep)
INCREASED CLIMATE CHANGE MITIGATION
Reduced GHG emissions (tCO2 eq)
REDUCTION IN WASTE PRODUCTION
Reduced tons of waste/year

POLICY CHANGE
Policy documents (e.g. action plans / charters) adopted and imple- mented to address a specific challenge
IMPROVED GOVERNANCE
Time saved for lower administrative obstacles / burdens

INVESTMENTS TRIGGERED
€ of triggered investments
INCREASED BUSINESS ACTIVITY / CAPACITY
New products, processes or services based on the pilot
COST SAVINGS AND IMPROVED SERVICES
% savings and increased users' satisfaction
INCREASED JOBS / EMPLOYABILITY
Jobs and employment opportunities created

PROJECT DISSEMINATION

Project publicity and dissemination of activities and outputs is a key component of each project. However, due to focus on content, communication is often underestimated both in terms of budgeting and in terms of planning and implementation. This section provides a template of a project dissemination outline to plan accordingly, and two annexes to help with proper implementation.

4.2 Project Dissemination Plan

TYPE OF TOOL

Template for Managing Authorities to create clear guidance for applicants and beneficiaries on how to plan and budget for communication and dissemination activities. The outline can be used for programme level as well when informing about projects.

TOOL USER GUIDE

The outline is supposed to be used as a structure for a full-fledged communication and dissemination plan on project or programme level. Each section should clearly describe both content and resources that are needed to deliver (budget, human resources, other resources). The annexes should be used throughout the communication/dissemination plan implementation to plan and track specific activities. Please refer to the Partner Dissemination Planner and the General Dissemination Tracker template in the online version of the tool.

OUTLINE TEMPLATE

1. Executive abstract
2. Introduction: Project overview
3. Core objectives of the project
    3.1 Concerns and needs
    3.2 Expectations
4. Objectives and situation analysis of the dissemination strategy
    4.1 Perspective
    4.2 SWOT analysis in relation to dissemination
    4.3 Key success factors
5. Theme and objectives
6. Target audience
    6.1 Overview of the strategy adopted
    6.2 Stakeholders
8. Channels and tools
9. Communication mix
10. Dissemination Timeline
11. Resources
    11.1 Visual identity
    11.2 Logotype of the project
    11.3 Acknowledgment of the European Commission funding
12. Social Media Strategy
13. Impact assessment
14. Performance indicators
15. Sustainability statement
16. Ethical statement
17. General principles of GDPR and its relevance for dissemination purposes
19. Annex 1: Partner Dissemination Planner – Template
20. Annex 2: General Dissemination Tracker – Template

PROJECT BUDGET

Tools to Facilitate and Manage EU Funding

BACKGROUND AND RELEVANCE

Simplified cost options (SCOs) are often praised as a key simplification tool in EU funding. As this can be true in many cases, it is important to keep in mind that there are many very different SCOs and in order to manage them well, a clear and structured overview of all common options is needed. However, the list can never be final as new SCOs can be developed by Managing Authorities throughout the programming implementation period.

Eligible costs of projects are calculated according to a predefined method based on outputs, results or other costs.

The tracing of every euro of co-financed expenditure to individual supporting documents is no longer required.

SCOs use fair, equitable and verifiable calculation methods based on:

- Statistical data, other objective information or an expert judgement
- Verified historical data of individual beneficiaries
- Application of the usual cost accounting practices of individual beneficiaries

This section addresses a common challenge faced by social services - the administrative burden of accessing EU funding. Managing Authorities can explore Simplified Cost Options (SCOs) as a solution. Additionally, to the Commission guidelines on the use of SCOs, the toolkit offers a concise overview of SCOs in EU-funded projects. It discusses their pros and cons based on real-world experience and provides valuable recommendations for Managing Authorities. You can access a library of best practices from the social sector related to SCOs online.

5.1 Overview of simplified cost options (SCOs) in EU funded projects

STANDARD SCALE OF UNIT COST

- calculation of all/ part of costs of specific budget line
- fixed in advance
- amount multiplied with number of units
- applied to easily identifiable quantities

LUMP SUM

- calculation of all or part of costs of the project
- subject to achievement of predefined outputs/activities
- 0–1 approach (milestones)
- applied to clearly defined activities

FLAT RATE

- calculation of costs of a specific budget line(s)
- calculated by applying a percentage fixed in advance
- percentage applied to one/several budget lines

OFF THE SHELF VS DIY SCOS

- Off the shelf: Ready-made SCOs available from the relevant Regulations (CPR)
  - Up to 7% flat rate for indirect costs (= admin cost flat rate) of eligible direct costs
  - Up to 15% flat rate for indirect costs (= admin cost flat rate) on direct staff costs
  - Up to 20% flat rate for staff costs, on all other direct costs,
  - Up to 40% flat rate for all other costs on staff costs
- DIY (Do it yourself): Set up individually at programme level (by Managing Authority)
  - Own calculation by MA (must be fair, equitable, verifiable), using:
    - Historical or statistical data,
    - Objective information,
    - Expert knowledge,
    - Usual practices of project partners,
  - Must be calculated in advance (before the call for proposals).

SCOs can be combined among each other and with regular budgeting.

SECTORAL APPLICATION OF THE SCOS

This section incorporates feedback from five social services sectors: Services for Child Protection and Families in Poverty, Work Integration, Persons with Disabilities, Poverty and Homelessness, and Older Persons. The SCOs have been reviewed by experts across these sectors. The gathered feedback suggests the following improvements to meet sector-specific needs.

- Budgeting Support: Provide a budget template or calculators like some EU programmes in direct management.
- Budget Clarification: Provide in-depth glossaries, explaining key features of common simplified budget options with clear examples. This applies especially to social service organisations and those with limited experience in budget drafting.
- Capacity-Building for Budgeting: Provide capacity-building opportunities targeted to social services professionals for the drafting of budgets and implementation of simplified cost options in the framework of ESF+ and ERDF.
- Consideration for Specific Target Groups: When designing SCOs for projects in the fields with specific and vulnerable target groups such as families in poverty and child protection, and persons with disabilities, always consider the extra costs this requires in order to provide efficient support to these singular projects.
- Overall Simplification: Overall simplification, including SCOs, to address the complexity that is still perceived as too high, particularly for small NGOs within programmes using SCOs. A more streamlined and simplified approach is deemed essential and beneficial for the sector.

5.2 Simplified Cost Options (SCO) - positives and negatives from real life experiences

The document can be used as a quick reference when deciding whether SCOs should be used in specific cases based on real-life feedback from previous experience.

POSITIVES

+ **Streamlined processes:** SCOs reduce administrative burdens for beneficiaries by simplifying cost calculations and reporting.
+ **Flexibility & predictability**: SCOs allow adaptable resource allocation, enhancing cost predictability and project efficiency.
+ **Less documentation:** SCOs entail simpler documentation, freeing beneficiaries from excessive paperwork.
+ **Faster reimbursement:** SCOs expedite fund disbursement, aiding beneficiaries' cash flow.
+ **Inclusion for small entities:** SCOs help smaller organisations join projects, thanks to reduced complexity.
+ **Efficiency & effectiveness:** SCOs boost project focus, leading to better outcomes and performance.
+ **Audit reduction:** SCOs involve fewer audits than traditional methods.

Additional Benefits for the Social Sector:

+ **Flat rates for indirect costs:** Easier overhead cost allocation.
+ **Lump sums for training:** Simplicity in budgeting; note limitations for complexity.
+ **Outcome-based assessment:** Emphasis on project results, not just spending.
+ **Unit costs for travel:** Efficient travel expense management.
+ **Flexibility of unit costs:** Partial payouts for progress made.
+ **Simplified procurement checks:** Reduced oversight, but compliance remains crucial.

NEGATIVES

- **Unclear archiving requirements:** Lack of clarity on necessary documentation for audits and tax purposes.
- **Cost inaccuracy:** SCOs, especially lump sums, may lead to imprecise cost estimates affecting financial management.
- **Limited adaptability:** SCOs hinder flexibility for adjustments and unforeseen changes, impacting project responses.
- **Misallocation risk:** SCOs shift risk of improper spending to beneficiaries, jeopardizing project objectives.
- **Reduced transparency:** SCOs decrease expenditure transparency, challenging proper fund use oversight.
- **Inadequate cost coverage:** SCOs might not match actual costs, risking underfunding and quality compromise.
- **Diminished accountability:** SCOs may lower financial accountability and control, risking misuse.
- **Inconsistent application:** Varying SCOs lead to inconsistent cost assessment and comparison.
- **Competition fairness risk:** SCOs like unit costs might compromise fair procurement practices.
- **Audit and eligibility risks:** Inadequate documentation can lead to audit issues and eligibility concerns.

More specifically, in the social sector the stakeholders pointed out the following drawbacks of SCOs:

- **Inflation and adaptation:** SCOs struggle with changing prices, impacting project financial alignment.
- **Unit costs limitations:** SCOs do not accommodate special needs in social services, risking financial strain.
- **Limited innovation reflection:** SCOs fail to capture dynamic project costs accurately.
- **Flat rate inadequacy:** Predetermined flat rates may not align with actual expenses.
- **Innovation project challenges:** SCOs hinder precise cost calculation for innovative projects.
- **Consortia risk:** Lump sums risk project failure due to non-performing partners.
- **Predefined targets:** Lump sums limit adaptability in defining project objectives.
- **Double funding risk:** Flat rates might cause double funding conflicts with other sources.
- **Complex work packages:** SCOs complicate measuring success for intricate work packages.

SECTORAL APPLICATION OF THE POSITIVES AND NEGATIVES OF SCOs

This section incorporates feedback from five social service sectors: Services for Child Protection and Families in Poverty, Work Integration, Persons with Disabilities, Poverty and Homelessness, and Older Persons. The positives and negatives of SCOs have been reviewed by experts across these sectors. The gathered feedback suggests the following points to take into account to meet sector-specific needs.

- Positive Impact of SCOs for Smaller NGOs: Many smaller NGOs within the sector lack budgeting experts. The use of Simplified Cost Options (SCOs) is seen as beneficial, reducing the necessity to hire budgeting experts for EU funded projects.
- Challenges with Fixed Percentages and Unit Rates: Fixed percentages or unit rates may be insufficient to cover costs, particularly when working with vulnerable groups with special needs. This raises the risk of not fully covering all project costs when SCOs are used.
- Complexity and Challenges with Volunteers: Potential difficulties in using SCOs for projects and organisations that heavily rely on volunteers. Address the need for more nuanced approaches to account for volunteer-based contributions.
- Increased Budget Flexibility: Increased budget flexibility for organisations and projects working with vulnerable target groups is needed. Calls for projects using SCOs should account for this flexibility, especially in scenarios of extreme inflation or other unexpected circumstances affecting prices and costs.

5.3 Recommendations for Managing Authorities

- **Consider beneficiary and Helpdesk project network support:** Take into account the overall positive feedback and support from beneficiaries and MAs within the Helpdesk project network regarding the wider use of SCOs, where appropriate and efficient. This feedback indicates that SCOs can bring advantages in many project scenarios.

- **Balance the use of SCOs:** It is important to carefully consider both the positive and negative aspects of SCOs, as listed in Tool 5.2. Avoid overusing SCOs in situations where their implementation could potentially jeopardize the success of projects. Maintain a balanced approach that considers the specific needs and requirements of each programme/call/project.

- **Provide budgeting flexibility:** Enable budgeting flexibility by letting applicants and beneficiaries choose between traditional methods and SCOs based on their needs. However, be cautious as too many options can create administrative challenges and confusion, especially with a high number of applications.

- **Provide specialized guidance and support:** Develop comprehensive and sector-specific guidelines on implementing SCOs in social service projects. Offer clear instructions, templates, and examples tailored to the unique context of social services. The guidelines should include practical implications for project implementation and monitoring. Additionally, establish dedicated helpdesks or support channels where beneficiaries can seek guidance and clarification on SCOs specific to the social services sector. Ensure that beneficiaries have a thorough understanding of SCOs and how to prepare for project implementation when utilizing these budgeting options.

- **Conduct capacity-building programmes:** Organise training sessions and workshops to enhance beneficiaries' understanding of SCOs and their practical implications in the social services sector. Cover topics such as budgeting with SCOs, documentation requirements, eligibility criteria, and reporting procedures. Encourage beneficiaries to actively participate in these programmes to strengthen their knowledge and skills in managing SCOs effectively.

- **Improve clarity over administration and archiving:** In many cases it is not clear to the beneficiaries what kind of documentation needs to be kept and archived for SCOs for the case of an audit. It is necessary to understand on all levels that all accounting documentation must be in place and archived even when SCOs are being used, including proper procurement and proof of what was delivered for each expenditure and proof of all 3E principles being in place (economy, efficiency, effectivity). It is necessary to properly inform the beneficiaries that for audit and tax reasons, all documentation must be in place also in projects using SCOs.

- **Maintain consistency in rules:** It is crucial to establish clear rules and criteria from the outset and avoid making significant changes during the project implementation period. Changing methodologies or assessment criteria for the fulfilment of units in unit costs, for example, can introduce uncertainties and potentially disrupt project progress.

- **Tailor SCOs to the specific needs of social services:** Recognise that the social services sector has unique requirements and challenges. Adapt SCOs to address the specific characteristics of social service projects, considering factors such as service delivery models, target groups, and the nature of interventions. This customization can enhance the effectiveness and efficiency of SCOs in supporting social service initiatives. *The Helpdesk project will explore and analyse specific cases in more detail during sectoral workshops.* This approach allows for a more targeted assessment of SCOs' applicability and potential benefits in social service projects.
    - Specific cases have been discussed that should be elaborated in the focused sectoral workshops (i.e., unit costs for obtaining cars (EVs) for social services, home adaptations/renovations, trainings in social services)

- **Foster collaboration and knowledge sharing:** Facilitate platforms for beneficiaries in the social services sector to share experiences, best practices, and lessons learned related to SCOs. Encourage networking and collaboration among organisations implementing similar projects to promote a supportive community where beneficiaries can exchange insights, challenges, and innovative solutions.

- **Monitor and evaluate the impact of SCOs in social services:** Establish mechanisms to assess the effectiveness and impact of SCOs in social service projects. Regularly monitor and evaluate the outcomes, efficiency gains, and cost-effectiveness achieved through the utilization of SCOs. This evaluation process can help identify areas for improvement, share success stories, and inform future decision-making regarding SCOs in the social services sector. Technical assistance budget for evaluations could be used within each of the programmes.

- **Engage stakeholders in policy discussions:** Involve stakeholders from the social services sector, including service providers, advocacy groups, and experts, in policy discussions and consultations related to SCOs. Seek their input and feedback to ensure that the design and implementation of SCOs align with the specific needs and realities of the social services sector.

- **Cost calculators:** The cost calculators that have been developed to help applicants in preparing their budgets are very important and useful. However, there are several problems that need to be taken into account by Managing Authorities - applicants sometimes 'hack' the formulas in the calculators and the costs transferred to the application form often do not match the costs in the calculators.

PROJECT REPORTING

Tools to Facilitate and Manage EU Funding

BACKGROUND AND RELEVANCE

This section offers practical tools for Managing Authorities (MAs) to facilitate the reporting phase with EU-funded projects. These tools include:

1. Most common issues in reporting for social services providers
2. Potential solutions, best practices to be adopted by Managing Authorities
3. Common mistakes in on-site check of EU funded projects. You can download this tool in detail online
4. Most common mistakes in reporting of EU funded projects. You can download this tool in detail online
5. EU Funds Ombudsman for MAs. You can download this tool in detail online

6.1 Most common issues in reporting for social services providers

Many applicants and beneficiaries are afraid to provide honest feedback to MAs as they believe in case the feedback is negative it could have negative effects on future project applications. We gathered the most common issues the social services sector had with Managing Authorities in real life and suggested easy-to-implement solutions.

TYPE OF TOOL

Spreadsheet / Cheat Sheet for Managing Authorities

TOOL USER GUIDE

Evaluate if the listed issues are relevant for your programme and if so, consider the suggested or any other available solution.

SPREADSHEET

The Helpdesk project organised a survey and a series of workshops on the most common issues social services providers are facing in reporting when implementing EU-funded projects. The following were most described as key obstacles in successful reporting within the projects:

- **CHANGING RULES DURING THE PROJECT IMPLEMENTATION**

Beneficiaries commonly face challenges with changing rules during project implementation, requiring them to adapt reporting processes and ensure compliance.

- **COMPLEXITY IN THE ADMINISTRATIVE AND FINANCIAL REPORTING**

Reporting for EU-funded projects is complex, involving multiple forms, guidelines, and financial requirements. Beneficiaries often find it challenging to understand and comply with these obligations. They should invest time in understanding the requirements and setting up efficient systems for compliance.

- **ISSUES IN FRAMING ACTIVITIES IN UNREALISTIC INDICATORS; UNCLEAR INDICATOR SYSTEMS**

Beneficiaries struggle aligning activities with EU programme indicators, affecting reporting. Clear understanding, early alignment, and guidance from Authorities are vital. Discrepancies in defining outputs, outcomes, and impact among MAs and IBs lead to misunderstandings. Beneficiaries seek unified terminology and clearer reporting.

- **LACK OF CONTINUOUS FEEDBACK FROM MANAGING AUTHORITIES**

Beneficiaries need consistent feedback from Managing Authorities during reporting. Timely feedback helps them understand expectations, address deficiencies, and improve reporting. Without it, errors and misunderstandings can persist. Beneficiaries should actively seek and maintain ongoing communication with Managing Authorities to enhance reporting and programme compliance.

- **PROCESSING DELAYS AND AUDITS OCCURRING SOMETIMES A FEW YEARS AFTER THE END OF THE PROJECT**

Reporting challenges can result from processing delays and post-project audits, which may occur several years later (up to 10 years). These delays can be due to a high project volume, resource limitations, or administrative factors. The extended time gap between project completion and audits can hinder beneficiaries in retrieving crucial information, potentially causing discrepancies in addressing audit findings. To mitigate these issues, beneficiaries should maintain organised project documentation, including expenditure, activity, and outcome records, throughout the project's life cycle.

ADDITIONALLY, THE FOLLOWING PERSISTENT PROBLEMS WERE PINPOINTED:

- **KNOWLEDGE GAP IN PROCUREMENT PROCEDURES**

Insufficient grasp of procurement procedures often results in reporting problems and non-compliance, which are widespread and expensive errors in many European operational programmes. Managing Authorities should collaborate with beneficiaries to prioritise procurement training for adherence, transparency, and the prevention of problems, cuts, and sanctions in reporting.

Mistakes in procurement often include:

- Lack of Transparency: This includes not publishing tenders as required, unclear tender documentation, and vague qualification criteria, all of which affect the transparency of the selection process.
- Inaccurate Tender Documentation: Errors or inconsistencies in tender documents that can create ambiguity and confusion for bidders.
- Equal Treatment Violation: Discrimination, favouritism, or unfair treatment of bidders can undermine equal opportunity and competition principles. All bidders must be assessed impartially using objective criteria.
- Failure to Comply with formal requirements: Each EU-funded programme has strict and often different procurement rules, which include specific formal procedures that need to be followed.
- Lack of Documentation and Record-Keeping: Inadequate documentation of the procurement process can make it difficult to demonstrate compliance, explain decisions, or handle potential audits.

LACK OF WORKFORCE

Insufficient skilled staff and high turnover can hinder reporting. Managing Authorities should aid beneficiaries in staff training and retention to ensure effective reporting.

HEAVY ADMINISTRATIVE WORKLOAD

Complex administrative tasks before and after implementation can overwhelm beneficiaries, impacting reporting. Efficient resource allocation and streamlined processes are essential for effective workload management.

UNREALISTIC TIMELINE

Unrealistic project timelines can result in rushed and incomplete reporting. Proper planning and consideration of reporting obligations are essential to ensure accurate and thorough reporting.

MONITORING FUNDS AND IMPACT

Challenges arise when monitoring and measuring impact of projects. Clear KPIs, robust monitoring systems, and data collection are key for accurate reporting on project outcomes. On programme level, the MA needs to ensure proper evaluation.

MANAGEMENT PATTERN VARIATIONS

Different management patterns among MAs and IBs create uncertainty and audit risks. Clear communication and better coordination among MAs and IBs are vital to mitigating legal uncertainties and reduce audit risks.

LACK OF SUPPORT AND TRAINING

Insufficient support and training hinder effective reporting, partnerships, and preparation for open calls. Comprehensive resources and guidance are necessary to enhance beneficiaries' capacity in these areas.

LIMITED PROJECT FLEXIBILITY, CHANGE MANAGEMENT

Rigid change processes affect projects and reporting. Beneficiaries need flexibility to adapt projects to real needs and avoid compliance issues. MAs and IBs should establish clear change management systems, specifying pre-approval or notification requirements for different types of changes.

FINANCIAL REPORTING

In flat-rate and lump-sum systems, financial reporting may not be required. In more complex projects, financial reporting can be simplified to essential elements, like summarising costs by budget category. Beneficiaries must still track all costs for potential tax office or audit checks.

6.2 Potential solutions, best practices to be adopted by Managing Authorities

- **SIMPLIFICATION OF REPORTING PROCEDURES**

Streamlining and simplifying the reporting procedures can lower the burden on beneficiaries and reduce the likelihood of reporting errors. These can include wider implementation of SCOs, simple reporting templates and tools, only asking for each information once, etc.

- **REMOVE OR SIMPLIFY TIMESHEETS WHERE POSSIBLE**

Minimising or eliminating the requirement for timesheets, especially for contracts solely dedicated to the project, can streamline the reporting process, and reduce administrative burden.

- **IMPROVED PRE-IMPLEMENTATION TRAININGS FOR BENEFICIARIES**

Enhance pre-project training for beneficiaries to ensure effective reporting. This training should cover all relevant topics, including common reporting errors, and ideally be conducted before or at the project's outset. It should include standalone materials and reference guides. Whenever possible, on-site workshops with practical exercises are optimal, but online training with recorded sessions is also a valuable alternative.

- **PROVIDE BETTER TRAININGS AND REFERENCE MATERIALS ON PROJECT INDICATORS**

Offering comprehensive training and easily accessible reference materials specifically focused on project indicators, terminology and expected outcomes can enhance beneficiaries' understanding and accurate reporting of project progress and impact.

- **IMPROVE COOPERATION ON CHANGE MANAGEMENT WITH BENEFICIARIES**

Foster collaboration and open communication with beneficiaries regarding project changes, acknowledging that change is inevitable and providing support and guidance to ensure smooth adaptation and accurate reporting.

- **SECTORAL EXPERTISE WITHIN MANAGING AUTHORITIES**

Boost Managing Authorities' sector expertise for better project monitoring and support. Tap into external evaluators and technical assistance resources to bring valuable expertise during project implementation.

- **OMBUDSMAN SUPPORT FOR COMPLAINTS/APPEALS**

Creating an Ombudsman role supports complaints and appeals, giving beneficiaries a platform for resolution, promoting reporting transparency and fairness.

SECTORAL APPLICATION OF THE PROJECT REPORTING

This section incorporates feedback from five social service sectors: Services for Child Protection and Families in Poverty, Work Integration, Persons with Disabilities, Poverty and Homelessness, and Older Persons. The gathered feedback suggests the following improvements to meet sector-specific needs.

- Awareness of Reporting Challenges: MAs should be aware of reporting challenges specific to the sector they are working in, especially when dealing with vulnerable target groups. In some cases, obtaining participant lists or monitoring sheets may involve labelling participants as “disadvantaged” or “in poverty.” However, this can be a sensitive issue, and participants may be reluctant to sign such documents. When working with children, especially those from disadvantaged communities, handling personal data becomes even more sensitive. Approval from parents may be necessary for signing any documents, such as attendance or monitoring sheets. In situations where support is provided in environments without parents (e.g., schools, children’s clubs, community centres), reporting becomes challenging. There may be practical issues in reporting attendance, as traditional methods like pictures or attendance sheets may not be appropriate. Reporting issues in environments without parents can be difficult to solve, and it does not provide a clear solution for how to address the problem of reporting on the attendance of children in such cases.
- Simplify Reporting Process: Ensure simplicity, transparency, and coherence in reporting by eliminating redundant questions, simplifying timesheets, expanding accepted reporting tools, and automating financial follow-ups, especially for organisations dealing with older persons / unemployed / persons with disabilities / families in poverty and children, to accommodate limited resources.
- Provide Clear Information: This includes information on how to fill out forms, record staff time and the way reporting is expected to be done. This would help organisations to focus on areas that could potentially become an issue.
- Identify Common Mistakes: Highlight and address recurring errors to enhance reporting accuracy.
- Consistency in Rules: Maintain consistency in rules without introducing changes during ongoing processes.
- Enhancing Sustainability: Reporting should be designed to incentivise and support broader dissemination in the long term after the end of the programme. This mainly includes sharing and implementation of good practices and tools.
- Improving Reporting Indicators: Diversifying data collection methods, emphasising the quality of work over sheer working hours.
- Reasonable Logo Usage Requirements: Implement sensible guidelines for logo usage in documents.
- Account for Differences: Address variations in national rules, calendar years, and project periods when recording staff time and financial reporting.
- Mitigating Risks: Incorporate risk assessment for projects to enable teams to proactively address potential issues.
- Prevent Double Funding: Recognise and address the potential issue of double funding in organisations managing multiple projects with limited resources.

PROJECT FOLLOW-UP AND SUSTAINABILITY

Tools to Facilitate and Manage EU Funding

BACKGROUND AND RELEVANCE

Generally, social service providers and Managing Authorities identify the following typical challenges and obstacles when it comes to project sustainability:

- Lack of financial and human resources to sustain project results and comply with contractual obligations regarding project sustainability/durability, especially in non-profit organisations.
- Lack of sustainability plan or design thinking ensuring transferability, replicability, and sustainability, especially in social innovation projects.
- Contractual obligations regarding sustainability of project results are too strict and thus it is a barrier for submitting proposals.
- The continuation of the project activities after the project's end does not occur in most cases without further financial support.
- EU funding logic often restricts access to funding from other EU programmes for the continuation/sustainability of project activities.
- Although EU funding is meant to give a kick-start to certain interventions, reforms and innovations, after which national funding is supposed to take over, lack of political will for national financing or limited national resources make it difficult to get funding for the project follow-up period.
- Lack of support, guidance from Managing Authorities regarding sustainability, while monitoring of sustainability period is arbitrary in some programmes.
- Communication, information and training on the possibilities and characteristics of EU funds to help use them is not addressed.
- The project implementation period for some calls is too short to get and measure more tangible results or longer lasting impact.
- Lack of continuity during call design and lack of synergy building between programmes/calls

In the case of social services projects lack of sustainability is especially problematic as it can lead to discontinuity of the service and support to persons in vulnerable situations.

This section contains a collection of tools designed to facilitate the sustainability of projects in ESF+ and ERDF programmes supporting social services. The first tool proposed for this topic, *Action points to facilitate project sustainability in social protection, inclusion, and innovation projects, is provided below, while the second tool, Map of success factors and pathways in ensuring sustainability of social projects, can be accessed in the online version of the toolkit*.

As social services typically include smaller and less experienced organisations in the project management from the civil society sector, the lack of both human and financial capacity often impedes them to access and sustain project funding. The most challenging obstacle is the requirement of project sustainability, thus facilitating it by all possible means is crucial in order to diversify the pool of applicants.

7.1 Action points to facilitate project sustainability in social protection, inclusion, and innovation projects

TYPE OF TOOL

The tool is a list of courses of action to be used by MAs' strategic level units for developing actions to facilitate the sustainability of projects of social services.

TOOL USER GUIDE

Integrate the action points into the strategic planning of the improvement of the Managing Authority's work.

ACTION POINTS

- **Review sustainability-related contractual obligations and tailor them to fit the call's objectives, targeted applicants, and the relevant EU regulation. Include these tailored and call-specific sustainability requirements in the call documentation.**
- **Map synergies between all available and planned funding programmes, national or EU level, and align timing and content of funding actions to give way to continuity of social projects.**
- **Allow access to more than one funding source (e.g., ESF+ complemented by national funding) in order for the applicants to co-finance the project and to allow for continuity between projects.**
- **Make sure to ask about the projects' plans for sustainability in the applicaation form and at the same time provide support and guidance about project sustainability tailored to social services.**
- **Support applicants, especially smaller and less experienced ones, in their efforts to sustain project results by building their capacities on design thinking, sustainability planning, visibility and dissemination of project results and on EU and national funds characteristics, complementarity and synergies before and during calls for proposals.**
- **Allow more flexibility, especially for longer projects to adjust and to react or respond to changing circumstances or policies during project implementation and follow-up period, and to change sustainability plans or obligations accordingly.**
- **Allow longer implementation periods for projects of innovation for disadvantaged groups, where measuring and obtaining tangible results and real impact might take longer.**
- **Conduct systematic and regular monitoring activity throughout the project and the follow-up period to filter and react to foreseeable risks in sustaining project results.**

- **Collect and share in a user-friendly way, national and European best practices for sustainability (e.g., Tool B - Map of success factors and pathways in ensuring sustainability of social projects)**
- **Organise, give platform to networking and mutual learning activities between projects implementers.**
- **Conduct programme-level evaluation with a focus on project sustainability and its possible gateways to public funding.**
- **Encourage by all possible means that the results of programme evaluations feed into policy level decision-making.**
- **Seek to include modelling of sustainability options for projects of social services in development areas to elaborate methodologies, pathways, whether through transnational, restricted or TA projects.**