



SYNTHESIS REPORT

of self-evaluations on

planning approach

**as applied by the
EQUAL programme**

November 2005

rue du Luxembourg 23/6
1000 Brussels – Belgium
T. 32 02 514 36 41
F. 32 02 514 36 42
www.pcm-group.com
info@pcm-group.com

PCM GROUP BVBA - PROCESS CONSULTANTS AND MODERATORS
vat be 445.384.507 - HR Brussels 642859, ING bank - Tervuren, no. 310-1433226-40

The report has been prepared by Frank Little for PCM Group, Process Consultants & Moderators, on behalf of the European Commission. It forms the basis of a seminar on the topic of planning methods scheduled for November 2005 in Vilnius.

1. Introduction

This report is intended to give a synthesis of the findings of the self-evaluations carried out for the EQUAL programme in a number of Member States in the course of 2005. Self-evaluation reports were used from Belgium, Italy, Lithuania, Poland, Sweden and the United Kingdom.

The evaluators used a variety of methods, including written questionnaires and surveys, in-depth interviews with project managers of the Development Partnerships, interviews with representatives of the EQUAL Managing Authority and supporting units, evaluation workshops, meetings with stakeholders, and analysis of documents (applications, proposed plans). Details of the self-evaluations, methodology use, data collected, etc. can be found in the self-evaluation documents of the national authorities and are not repeated here.

The evaluations focused specifically on design and planning methodology; the present document therefore does not give information about the substance of the activities themselves.

This brief report is intended to present general findings or lessons learned, major conclusions and specific recommendations which may be of use to others regarding the design and planning of programmes and projects. Although this report is directly based on the information of the country self-evaluations, the focus is not on country-specific findings: for detailed information about the results from specific countries, we refer to the self-evaluation reports themselves. Furthermore, other countries not mentioned here may be applying similar tools and methods as those under review here. The report focuses on the most active countries under the EQUAL programme.

2. Planning Methodology

In the EQUAL programme, the national authorities invite interested parties to form Development Partnerships (DP's) around one or more themes; these DP's investigate the needs of end users and other parties involved and design and plan programmes and specific activities to respond to these needs. These programmes or projects are managed, monitored and evaluated using a variety of tools.

Partnerships may choose to design and plan, to manage and monitor and finally to evaluate their projects in a way appropriate to their own needs. One such approach is to organise participative workshops based on a widely used planning method called variously: PCM (Project Cycle Management), GOPP (Goal-Oriented Project Planning) and LFA (Logical Framework Approach). A description of the method can be found in the EQUAL Partnership Development Toolkit available from the EQUAL unit in the Commission¹.

The self-evaluations review the use which Development Partnerships have made of the approach described in the toolkit and the various tools or instruments which it provides.

The steps in a PCM/GOPP/LFA-style approach to design and management of the process are basically:

1. A framework is prepared by a number of initiators, and potential stakeholders are then involved in examining the current situation, determining shortcomings in present performance and key areas for further examination.
2. In a participative meeting, the analysis of problems (often in the form of a cause-effect hierarchy, called a problem tree) is made and from this potential objectives are generated.
3. A strategic selection is made from the objectives and one or more projects of activities are fixed by the Development Partnerships. Various criteria may be used, the most important of which is relevance. At a later stage, once an initial design has been produced, it is also possible to test for internal consistency and logic.
4. A project design is made in which the concrete outputs of the project/activity are agreed, along with risks due to external factors, and objectively verifiable indicators of success. The resulting plan is called a Logical Framework Matrix (sometimes called a Planning Matrix).
5. The plan is completed with details of activities, timelines, deadlines and deliverables, organisational aspects (who is responsible for what).
6. The resulting plan is subject to review to ensure it is complete, consistent, feasible and relevant. Issues of economy may also be considered.

¹ Partnership Development Toolkit: A partnership oriented planning, monitoring and evaluation guide for facilitators of EQUAL Development and Transnational Partnerships
http://europa.eu.int/comm/employment_social/equal/about/key-doc_en.cfm

7. The Development Partnerships monitor the progress of the activities carried out by specific partners or by the core DP partners themselves. The indicators of success in the Logical Framework Matrix are used.
8. Evaluation (internal or external) can also draw on the products of these steps to check whether the intended results and objectives have been met, whether the activities and resources have been used as planned, what effect external risk factors have had. The relevance of the activities (based on the original analysis of the situation) and the extent to which stakeholders have been involved (the process) and thus the extent of "ownership" and sustainability of the actions are also usually considered.

We refer to the underlying instruments and techniques, formats and procedures as the "toolkit". It is possible to use elements from the toolkit in isolation, although they are designed to offer a way of managing the entire process consistently or coherently. In practice, programme/project managers use some or most of the tools, sometimes adapting them or using them in new or different ways.

The design and planning activities are usually carried out in participative workshops, which are normally led by independent, neutral workshop facilitators who manage the process in order to achieve an effective and efficient process of discussion, review and agreement.

In some cases, Development Partnerships may use the underlying project design tool (the Logical Framework Matrix) without holding participative workshops with all the partners (for example, if it proves difficult to gather all partners together at the same time). In these cases, the relevant part of the planning process is usually delegated to the respective partners and DP management integrates this into a final planning matrix which is distributed to all concerned.

In addition, the authority responsible for implementing the programme in a country may use related tools to review and assess proposals and plans. Each authority applies those tools and approaches which best suit their specific situation.

Use of this approach is usually not mandatory (Lithuania did mandate use of the approach), although its value is already proven in other settings and use is recommended and supported in all the concerned countries by the Managing Authority and support agencies. In some countries there are Development Partnerships which do not use the toolkit for a variety of reasons (discussed further in this report). But in general it can be said that it has been widely used in many of the concerned countries and that where Partnerships have adopted this working method they almost always indicate that it offers significant advantages.

3. Main Findings of the evaluations

The national self-evaluations cover many but not all DPs in their countries. Details on the coverage are to be found in the national self-evaluation reports.

In some countries, use of the approach and its tools was made mandatory by the managing authority while in others it was simply recommended by the authority or offered as a useful set of tools by the supporting structures. The use of the method and underlying tools is varied: according to the self-evaluation reports it ranges from 12.5% of the partnerships surveyed to close to 100%. It should be noted that the highest figures for uptake of the method do not only come from countries which made use of this approach mandatory.

Where partnerships did not use the tools, a variety of reasons are given. Perhaps an important reason is that in general formal planning methods are often not used, especially if partners are already familiar with each other or with a programme's eligibility requirements. Reasons mentioned for non-use of the system are time, cost, complexity of the system if applied completely, sufficient programme/project management experience, or the need or preference to use existing planning systems within partner organisations. In some cases, practical reasons are given for not using the tools (or using them in different ways), for example the difficulty of gathering all relevant actors for participative workshops. The fact that some of the forms in use in the programme (e.g. the application form for transnational co-operation) do not use the same format as the toolkit is also sometimes given as a reason.

Since the country-specific data are not comparable, it is not possible to aggregate (quantify) the figures in the self-evaluation reports, and we recommend interested readers approach the Managing Authority in their country if they wish to review the detailed results of the evaluations.

In qualitative terms, we can say that the reports indicate that of those who have used the methodology, the overwhelming majority express the opinion that it is useful or very useful for their work. Most believe that it contributed strongly to better quality project management at DP level and decreased planning and design problems considerably. The positive effect of the high participation which the method offers meant that there were fewer issues regarding the division of responsibilities, the allocation of resources and personal and institutional problems within the partnerships.

Although some respondents comment that the planning approach is quite complex and not always easy to apply in practice, the evaluations indicate that even partnerships with no experience in managing projects were able to apply the techniques. This suggests that the training, publications/toolkit and other support were sufficient to overcome difficulties in practical application of the methods. The EQUAL projects include many different types of partners and were diverse in size, scope and budget: it would appear that the methodology was equally suitable to all.

Some quotes from respondents to the surveys illustrate the positive assessment which project and programme managers make:

- *"The stakeholder analysis clarified the relevance of partners to the DP"(UK); "When you plan with PCM you cannot 'cheat', for the division of roles among the partners is strictly competence-based." (Italy); "...it facilitates the division of responsibilities ..."(Belgium)*
- *"Stakeholder analysis was very helpful in early stages of managing the project, especially during threats or risk identification" (Poland)*
- *"It got partners involved and empowered"; "Able to listen to other partners' views", "With 28 partners it clarifies the issue and what to achieve"(UK)*
- *"The method increases involvement of the partners because they actively participate in defining their own interventions in the project"(Belgium)*
- *"When we switched from the intermediary beneficiaries to the final beneficiaries we found to our surprise that their problems were ignored in the initial proposal and that [specific problems originally mentioned] were relatively unimportant." (Italy)*
- *"Using the Problem and Objective assessment exercise regularly has helped to improve the quality of the project planning"(UK) "It allows one to apply logic in the analysis of problems" (Belgium)*
- *"The cause-effect analysis made the planning more transparent and facilitated project management (especially in large and complex projects)" (Poland)*
- *"Using the Identification stage creates quality data on which objectives can be based"; "[It] enabled us to deepen our analysis of the problems" (UK); "Easy for all stakeholders to understand complex phenomena."(Italy)*
- *"Creates ownership of the decisions"(UK); "Strongly empowered the beneficiaries and boosted their commitment"(Italy)*
- *"The Logical Framework helped us understand the dependencies and assumptions and made us think about what was realistically achievable" (UK)*
- *"It helps to place all the activities in a logical fashion, directed towards the objectives which we intend to achieve"(Belgium)*
- *"My way of planning projects has improved dramatically since I learned to listen to the beneficiaries". (Italy)*
- *"The constraints of the framework ensure rigour in planning the tasks". (Belgium)*
- *"Using PCM makes it easier to draft sound proposals" (Italy)*
- *"It helped us spend project money better, since it forced us to work on explicit objectives" (Italy); "... allowed the budget to be quantified better and showed up gaps ..." (Belgium)*
- *"In any case, the great value of this way of working seems without doubt ..." (Belgium)*
- *"The original proposal was virtually impossible to understand! PCM helped the DP clearly identify problems and objectives and specific actions and clearly linked budget resources to each activity. ..The method was immensely helpful in allocating the limited resources in a meaningful way."(Italy)*
- *"The investment we made to introduce the planning method was certainly productive." (Belgium)*

The self-evaluations all follow in general terms a similar format and add specific national emphasis. They deal with: *relevance*, *coherence*, *economy*, *effectiveness* and *efficiency*.

In the European Commission document "Evaluating EU Activities: A Practical Guide for Commission Services"² they are defined as:

- Relevance:** The extent to which an intervention's objectives are pertinent to needs, problems and issues to be addressed.
- Coherence:** The extent to which the intervention logic is non-contradictory/ the intervention does not contradict other interventions with similar objectives.
- Economy:** The extent to which resources are available in due time, in appropriate quantity and quality at the best price. The Financial Regulation defines economy as the requirement that the resources used by the institution for the pursuit of its activities shall be made available in due time, in appropriate quantity and quality and at the best price.
- Effectiveness:** The extent to which objectives set are achieved. The Financial Regulation defines effectiveness as attaining the specific objectives set and achieving the intended results.
- Efficiency:** The extent to which the desired effects are achieved at a reasonable cost. The Financial Regulation defines efficiency as the best relationship between resources employed and results achieved.

For the sake of clarity, we also include the following definitions from the Guide:

- Consistency:** The extent to which positive/negative spillovers onto other economic, social or environmental policy areas are being maximised/minimised.³
- Ex ante evaluation:** An evaluation conducted before the implementation of an intervention. Also referred to as an "appraisal".
- Ex post evaluation:** An evaluation conducted either on or after completion of an intervention.
- Impacts:** A general term used to describe the effects of an intervention on society. Impacts can be either positive or negative and foreseen or unforeseen. Initial impacts are called results, whilst longer-term impacts are called outcomes.
- Intervention logic:** The conceptual link from an intervention's inputs to the production of its outputs and, subsequently, to its impacts on society in terms of results and outcomes. ... [H]ow the programme achieves its specific objectives, and how ... specific objectives contribute to attainment of the general objectives? ...
- Monitoring:** The continuous process of examining the delivery of programme outputs to intended beneficiaries, which is carried out during the execution of a programme with the intention of immediately correcting any deviation from operational objectives. ...
- Outcomes:** The longer-term impact, usually expressed in terms of broad socio-economic consequences, which can be attributed to an intervention (e.g. a reduction in the number of long-term unemployed).
- Outputs:** The goods and services produced by an intervention (e.g. training courses for the long-term unemployed).
- Results:** The initial impact of an intervention (e.g. an improvement in the employability of the longterm unemployed through a rise in their skill level).

² *EVALUATING EU ACTIVITIES: A Practical Guide for Commission Services*. DG BUDGET – Evaluation unit, European Commission. July 2004. Ref. KV-59-04-532-EN-C. ISBN 92-894-7928-0.

³ Note: in these self-evaluation reports, however, *consistency* appears often to be used in a more general sense, i.e. the extent to which the elements in the Planning Matrix (Logical Framework Matrix) are internally logical. This is one aspect of *coherence* as defined in the Guide.

- Stakeholders:** The various individuals and organisations who are directly and indirectly affected by the implementation and results of a given intervention, and who are likely to have an interest in its evaluation (e.g. programme managers, policy-makers, the programme's target population).
- Sustainability:** The extent to which positive effects are likely to last after an intervention has terminated.
- Target population:** The intended beneficiaries (individuals, households, groups, firms) of an intervention. An intervention may have more than one target population. ...
- Utility:** The extent to which effects correspond with the needs, problems and issues to be addressed.

On the issue of **relevance**, the approach scores strongly. Using the toolkit in whole or in part helped to ensure that an intervention's objectives are pertinent to needs, problems and issues to be addressed. Also **ownership** of the DP's efforts by all those involved was strongly influenced by the participative approach: the active involvement of all the relevant actors made implementation easier and more focused on real needs. DP's which used the approach *avoided setting unrealistic or irrelevant objectives* based on poor problem analysis. Stakeholder analysis therefore plays a significant role regarding relevance, as does the analysis of problems and objectives.

Regarding **coherence**, respondents state that (when applied) the method was of definite assistance in preparing coherent plans; specific mention was made of the value of using the method with diverse partners to assist in achieving a common understanding and convergence among the partners on their common objectives. Also, the structured approach and the specific tools ensure that the intervention logic is coherent. Since the tools also require that the plans take account of factors external to the DP's own intervention, coherence with other efforts was actively considered in the design phase. There is also evidence from the assessors of the proposals and project selection committees (*ex ante* evaluation) that partnerships which used the method produced more internally logical plans or that the methodology made it easy to see gaps in the intervention logic and make requests to the partnerships for adjustments to their plans.

Regarding **economy** (the extent to which the use of resources could be focused), respondents seem mostly neutral. Probably for many countries it is still too early to say whether the promise of economy of resources which the method holds will actually be realised in implementation (hence the comment, for example, "*too early to say*"). The methods applied did ensure that resources were available in due time, of appropriate quantity and of the desired quality. Also, the internal logic helps to ensure that only those activities needed to reach the agreed results and objectives are designed into the project. The feeling of ownership for the entire process of the DP also reportedly led some partners to give up part of their share of the budget in favour of other partners (or organisations which were invited to participate chose not to and even proposed alternative organisations better suited to reach the objectives). It is unclear whether the Ratio Analysis tools⁴ were widely used by Development Partnerships.

On **effectiveness**, respondents score very strongly. The comments make it clear that a high level of confidence is generated by use of the method. The direct linkage of identified problems to intended objectives is seen as a key element, as is the provision of indicators/measures of success in the Logical Framework Matrix. (It must be added that, since DP's are currently implementing their activities, there is not yet sufficient information on the ultimate impact.) Where the tools were also used for the *ex ante*

⁴ Given in the Partnership Development Toolkit (Section 3.12, pages 54-56)

evaluation of proposals by the managing authority, effectiveness criteria form part of the assessment. This also contributes to DP effectiveness (filtering out less effective proposals).

On *efficiency* respondents are more neutral. Substantial numbers of DP's do state that application of the tools helped in managing human and financial resources more efficiently. There are examples where resources were re-allocated voluntarily to increase efficiency and also situations where DP's shared facilities and human resources, so reducing the total cost of interventions. In the design phase, there is evidence that application of the Logical Framework Matrix led to careful consideration of the necessity of including activities, and in some cases to the exclusion of activities which were originally planned. Concrete evidence of how this works in the implementation phase is only available from a limited number of DP's which have already completed their activities.

In some cases, the self-evaluations also considered the issue of *potential sustainability*. The *ex ante* evaluations of DP proposals indicate that the majority which used the tools exhibit a high degree of potential sustainability. In addition to the effect of including relevant stakeholders and other actors in the situational analysis, and ensuring that real needs are addressed, this is ascribed to the timely consideration of external risk factors and the fact that policy support from decision-makers was obtained at an early stage. Inclusion of relevant actors in the early stages of the design and planning process also focused attention on the capacity of implementing agencies to provide sufficient follow-up once the interventions are completed.

4. Conclusions

The following conclusions are stated in one or more of the self-evaluation reports. Because of the variety of situations in which national authorities and their DP's operate, it is not possible to quantify the extent to which member states support *all* conclusions. Nonetheless, there is a surprising unanimity in the country self-evaluation reports about these conclusions, and little which suggests that any specific conclusion here would not be supported in a specific country context.

Where the toolkit is used *partners* are convinced that it is relevant and effective.

The PCM approach appears to be especially valued for the fact that *ownership* among partners is strongly supported by the method. It ensures active participation of the beneficiaries and helps in the selection of partners and in enabling them to agree on common strategies. The tight connection between problem analysis and objectives is valued and the system generates *confidence* among its users that they will be more effective. Cultural differences between project team members are also accounted for. The *coherence* of objectives and activities which the Planning Matrix offers is highly valued. As are the insights its use offers into possible implications of the project.

DP managers who used the toolkit confirm its value for planning, monitoring and implementation

The DP activities which were designed and planned using the toolkit were felt to be more effective and more efficient. Managers mention: beneficiaries more committed and co-operative; clear and realistic objectives and due account of risk factors; sounder decision-making and more rational use of resources; inclusion of genuinely relevant actors. Some project managers indicated that they were looking for new tools and that the toolset and approach offered was very suitable to these needs.

DP proposals designed using toolkit principles are systematically better

For *relevance*, *feasibility* and *potential sustainability* the self-evaluation findings indicate that the proposals made by DPs which applied the tools were better than those drafted without use of these tools. In particular, it seems that applying the toolkit approach helped DP's define activities which can generate lasting benefits because they considered from the outset the concrete steps needed to obtain necessary policy support and follow-up. The inclusion of stakeholders in the (participative) planning process plays an important role in this respect.

Overall programme quality is improved according to the *programme officers*

The methods were seen as a powerful capacity-building mechanism by regional Managing Authorities, not only for the DP's but also for the authority staff involved. The tools helped in:

- setting up clear procedures and applicant guidelines;
- improving communication between the authority and the managers of DP's;
- enabling more rigorous monitoring and *ex ante* evaluation of DP proposals and impacts;
- supporting the establishment of meaningful DP networks.

It is also possible that where proposals have been designed using this methodology, their assessment (notably coherence with programme /priority objectives, feasibility and utility) and comparison (because of common structure for presenting the proposal)

may be easier, and thus use less time and resources in the assessment procedures, especially if the methodology is also explicitly applied for that assessment. (This will require further evaluation as implementation progresses.)

It may also be true that where project management uses all the tools throughout the project cycle, better quality data for monitoring and evaluation at programme level will be available. (Again this will require further evaluation during implementation.)

Current use and interest in the method is substantial.

The use of the method depends on many factors, including the programme phase in which the Development Partnerships (DPs) are operating as well as the instructions received from the Managing Authority regarding its use (e.g. whether it is mandatory, strongly recommended or completely optional). There is interest in applying the method, even among DPs which did not yet do so. The percentage of DPs who have already used the approach is substantial in some countries (sometimes almost 100%). In countries with a lower uptake, there appears to be potential for further application of the approach by other DPs; final application of the system in these countries is said to possibly rise to one quarter of all DPs.

The method needs to be used from the start if it is to be most effective.

To be most useful, the approach needs to be applied from the beginning, to enable participation in all stages of the design process. The timing of introduction is critical. In some countries, the method was introduced after the Partnerships had already identified their projects: project managers indicate that they regret this and will certainly wish to use the tools in preparing future applications. If DP's have already started their planning and design process there may be resistance to opening up discussion again and in changing ideas about what the project should be and do. There is however some evidence that the method (if applied well) can move partners to shift their views even if applied later in the process.

There is little evidence of other formal planning and design methods in use.

Only in few cases does it appear that if the toolkit approach is not used, some other planning method is used instead. Either no formal method is used (managers work on the basis of experience) or internal planning approaches are said to be used; however there appears to be little evidence that *planning and design methods* are actually in use (people appear to refer to internal *administrative* and *financial* systems or to existing *management information systems*).

A standard design and planning methodology seems to be worthwhile

From the evaluations it is clear that there is no common method used across all Development Partnerships. One evaluation stated: *"The scale of EQUAL expenditure by projects, the demands of large partnerships and the demands of managing innovation and mainstreaming suggests that DPs would benefit from adopting formal project management systems such as PCM under EQUAL in order to maximise results"*. There seems to be a significant gap in current project design practice which can be met by a consistent planning method. If widely applied across different programmes and activities, a standard approach would also help to reduce the costs of managing different programmes (specifically, the time spent by staff ensuring compliance to the different approaches of different programmes and organisations).

Training in alternative project design and planning methodologies is not evident.

Apart from the training specifically aimed at PCM/GOPP/LFA, there is little evidence that project managers of the DP's have received any other formal training in project design methods. (In general, we can also say that there are few alternative project management systems which offer participative approaches or which focus on "upstream" planning and design: most systems focus on "downstream" activity and resource planning.)

Project managers ask for more, additional and timely training and/or support.

The training on the planning method which was offered appears generally to have been appreciated. The approach is understood, although managers do state that it is not always easy to apply (for a variety of reasons). Additional training and other ways of developing experience with the planning tools would be welcomed. The timing of the training is seen as critical: it is essential that it be provided early in the planning process, when DPs are defining projects and choosing the methodology to manage their activities. Some managers mention the publications and EQUAL toolkit as helpful.

The toolkit system is currently not the DP Agreement.

Although the use of the tools is welcomed by partners and programme managers who have used it, they would welcome the possibility of using the Logical Framework Matrix and its associated instruments directly for their Development Partnership Agreements (DPAs). The tools do provide a good basis for the DPAs: however, it would ease their workload if these tools were integrated into the DPA requirements.

Unique application of the toolkit approach may not always be possible.

Programmes and their projects must meet different national and European requirements. Use of the toolkit approach may in some cases be limited by the need to meet other planning, monitoring and reporting requirements placed on partners (and also on the managing authorities). Although some DP's mention that convergence of the formal requirements for a DP Agreement and the toolkit approach would be valued, there may be specific reasons to apply different methodologies, for example if data and financial information must be collected for both national and European purposes (and if the national system does not use this methodology). This can preclude a DP from only applying the toolkit's methodology fully. Applying multiple systems is for obvious reasons not favoured.

The approach helps monitoring and evaluation.

The method is seen to help gather relevant monitoring information. Regarding evaluation, consistent use of the tools from the beginning will simplify the evaluation and make it more consistent with the planning phase.

The self-evaluation indicates that this planning method can be widely applied.

The evaluation results do not indicate major differences in use of or perceived value of the planning method among projects of different scope or budget or with different kinds of partners. Amount of experience with project management also does not appear to play a role. For this reason it would appear that the approach can be successfully applied in variety of situations.



5. Recommendations made in the self-evaluations

The following recommendations have been made in the self-evaluation reports.

Numbers between parentheses indicate the sources of the recommendation.⁵

1. That significant investments be made in upgrading the specific skills base expected of programme and project managers. Given the benefits derived from application of the EQUAL toolkit, ad hoc resources should be allocated for an extensive training programme or other support. (1) (3) (5) (6) (7)
2. That a national and transnational community of practice be established to exchange approaches and deal with barriers and problems. Project managers in a country could be networked into practical problem-solving action learning sets or participate in workshops designed to enable experiences to be shared. (1) (8)
3. That ongoing support of DP's which already use, or are considering using, the tools be ensured in each country. (1) (6) (7) (8)
4. That the administration system for projects be very flexible, to create the possibility for changes in planned activities in those cases where research is to take place during the implementation phase. The tools used under EQUAL make clear the difference between objectives, including outputs (these should be fixed), and the activities that lead to them (these should be flexible). (5)
5. That external and internal evaluators be networked in order to better support DP's in their project or programme management. This could include awareness of the PCM approach, and training on how it might be used as an improvement tool for DP's, and the use of the Logical Framework Matrix and Mainstreaming Framework as evaluation tools. (5) (8)
6. That broad support on project and programme management be made available in each country. This could be in the form of, for example, a project management resource service (help desk) which could include help desk functions, training, action learning sets, etc. Sufficient time and resources must be made available to offer the support which project managers indicate they would appreciate receiving. (1) (3) (7) (8)
7. That a standard methodology, set of tools and procedures be adopted at national and European level to equip programmes and projects to manage their processes. The toolkit provides tested tools which would serve this purpose. (3) (6) (8)
8. That training and advice on tools be standardized based on accredited training modules. A professional body could be established or existing professional bodies which focus on the methods in the toolkit could be approached to offer recognition (e.g. a "kitemark stamp" of conformity or approval) to PCM-related actions. (8)
9. That all the tools available in the toolkit be used consistently and both at programme and project level, from planning through monitoring to evaluation. For example, strictly "eligible-cost" type of financial audits and monitoring should be shifted to monitoring and evaluation which is more sensitive to effectiveness and efficiency. (3) (5)

⁵ (1) Belgium; (2) Hungary; (3) Italy; (4) Latvia; (5) Lithuania; (6) Poland; (7) Sweden; (8) United Kingdom.

10. That application forms and standard partner agreement formats in ESF programmes be redesigned so that they use and support the toolkit and separate the essential compliance, probity and eligibility issues from the design, management and monitoring issues. (8)
11. That a common language be adopted by all key actors involved in planning and managing ESF initiatives: programme and project managers, independent evaluators, consultants etc. (3)
12. That Development Partnerships be involved in the mainstreaming strategy building process of the Managing Authorities. Their consultation will ensure that their perspective on the causes of inequality and exclusion are reflected in the official strategy. This will help to build commitment and maintain the feeling of ownership in the mainstreaming phase of the programme. (5)
13. That the impact of using the toolkit on EQUAL outcomes be evaluated. The purpose would be to determine what added value is created through use of specific tools (for instance in achieving objectives and creating good working arrangements). (8)
14. That an effort be made to communicate the best practices coming from use of the toolkit. Learning seminars, conferences, etc. could be used, but it is also advisable to involve policy makers and key actors in programme and project levels, and use their networks to communicate key messages. (3)

ANNEX: CONCTACTS IN THE MEMBER STATES

Lietuva (Lithuania)

Ministry of Social Security and Labour



A. Vivulskio 11
2693 Vilnius
Phone: +370 526 64 260
Fax: +370 526 64 209
[✉post@socmin.lt](mailto:post@socmin.lt)
www.socmin.lt

Ms Nijole Mackeviciene
Phone: +370 526 64 260
[✉nmackeviciene@socmin.lt](mailto:nmackeviciene@socmin.lt)

Ms Aiste Cerniauskaite
Phone: +370 526 64 270
[✉ACerniauskaite@socmin.lt](mailto:ACerniauskaite@socmin.lt)

EQUAL NSS
Human Ressources Development Programmes Foundation
Gelezinio Vilko 12
0112 Vilnius
Lithuania
Phone: +370 526 64 9340
Fax: +370 526 60 8281
[✉info@esf.lt](mailto:info@esf.lt)
www.equal.lt

Ms Neringa Poškutė
Phone: +370 5 264 93 44
[✉neringa@equal.lt](mailto:neringa@equal.lt)

Ms Vytenė Pivoraitė
Phone: +370 5 264 92 33
[✉vytene@equal.lt](mailto:vytene@equal.lt)

Belgique (french and german speaking Belgium)

Agence FSE
111, Chaussée de Charleroi
B-1060 Bruxelles
Fax: +32 2 234 39 96
www.fse.be
[✉info.equal@fse.be](mailto:info.equal@fse.be)

Mr Guy De Smedt
Phone: +32 2 234.39.40

Ms Jenny Charlier
Phone: +32 2 234 39 70
[✉jenny.charlier@fse.be](mailto:jenny.charlier@fse.be)

Italia (Italy)

Managing Authority
Ministero del Lavoro e delle Politiche Sociali-
Direzione Generale per le Politiche
l'Orientamento e la Formazione
Via Fornovo, 8
I - 00192 Roma
Phone: +39 06 3675-4328, 3675-4349
Fax: +39 06 3675-5025
[✉ diriv@welfare.gov.it](mailto:diriv@welfare.gov.it)

Lucia Scarpitti
[✉ lscarpitti@welfare.gov.it](mailto:lscarpitti@welfare.gov.it)

EQUAL National Support Structure ISFOL
Via G.B. Morgagni 30/E
I-00161 Roma
Phone: +39 06 44 59 0873 - 06 44 59 0811
Fax: +39 06 44 59 0875
[✉ equal@isfol.it](mailto:equal@isfol.it)

Valentina Benni
[✉ v.benni@isfol.it](mailto:v.benni@isfol.it)

Monica Puel
[✉ m.puel@isfol.it](mailto:m.puel@isfol.it)



Polska (Poland)

EQUAL Managing Authority
Ministry of Economic Affairs and Labour
Department for ESF Management
ul. Żurawia 4a
PL-00-955 Warszawa
Phone: +48 22 693 47 42
Fax: +48 22 693 40 71
www.equal.gov.pl/

Mr Piotr Stronkowski, Deputy Director
Phone: +48 22 693 47 66
[✉ piotr.stronkowski@mgip.gov.pl](mailto:piotr.stronkowski@mgip.gov.pl)

Ms Malgorzata Lublinska, Head of
EQUAL Unit
Phone: +48 22 693 47 42
[✉ malgorzata.lublinska@mgip.gov.pl](mailto:malgorzata.lublinska@mgip.gov.pl)

Ms Dorota Bortnowska, Chief expert
Phone: +48 22 693 47 50
[✉ dorota.bortnowska@mgip.gov.pl](mailto:dorota.bortnowska@mgip.gov.pl)



EQUAL National Support Structure
Task Force for Training and Human Resources
"Cooperation Fund" Foundation

Ms Małgorzata Rejnik, Director
Phone: +48 22 625 39 37
[✉ malgorzata.rejnik@cofund.org.pl](mailto:malgorzata.rejnik@cofund.org.pl)



ul. Górnośląska 4A
 PL-00-444 Warszawa
 Poland
 Phone: +48 22 625 39 37 or 622 19 91
 Fax: +48 22 625 28 05
[✉equal@cofund.org.pl](mailto:equal@cofund.org.pl)
www.equal.org.pl

EQUAL

Ms Beata Puszczewicz, Deputy Director
 Phone: +48 22 625 39 37
[✉beatapu@cofund.org.pl](mailto:beatapu@cofund.org.pl)

Latvija (Latvia)

Ministry of Welfare
Deputy State Secretary
 Skolas street 28
 Riga, LV-1331
 Phone: +371 702 16 00
 Fax: +371 727 64 45
[✉lm@lm.gov.lv](mailto:lm@lm.gov.lv)
www.lm.gov.lv

Mr Ingus Alliks
 Phone: +371 702 16 02
[✉Ingus.Alliks@lm.gov.lv](mailto:Ingus.Alliks@lm.gov.lv)

EQUAL Implementation Unit

Ms Antra Jansone
 Phone: +371 702 16 56
[✉Antra.Jansone@lm.gov.lv](mailto:Antra.Jansone@lm.gov.lv)

UK - Great Britain

Department for Work and Pensions
 ESF Division
 Moorfoot - Level N2
 UK-S1 4PQ Sheffield
 Phone: +44 114 267 73 03
 Fax: +44 114 267.72.89/85
www.esfnews.org.uk

Mr Ken Lambert
 Phone: +44 114 267 7286
[✉ken.lambert@dfes.gsi.gov.uk](mailto:ken.lambert@dfes.gsi.gov.uk)

Mr Ian Forsyth
 Phone: +44 114 267 7282
[✉Ian.Forsyth@dfes.gsi.gov.uk](mailto:Ian.Forsyth@dfes.gsi.gov.uk)

ECOTEC (England)
 The EQUAL Support Unit
 Priestly House, 28-34 Albert Street
 GB-B4 7UD Birmingham

Ms Margaret James
[✉margaret_james@ecotec.co.uk](mailto:margaret_james@ecotec.co.uk)



Phone: +44 121 616 36 60
 Fax: +44 121 616 36 62
[✉equal@ecotec.co.uk](mailto:equal@ecotec.co.uk)



www.equal.ecotec.co.uk

EQUAL

Welsh European Funding Office (Wales)

The Old Primary School

GB-SY20 8PE

Phone: +44 1654 704 900

www.wefo.wales.gov.uk/newprogs/equal

Michelle Howarth

michelle.howarth@wales.gsi.gov.uk

Scottish ESF Objective 3 Partnership (Scotland)

Caithness House

127 St Vincent Street

GB-G2 5JF Glasgow

Phone: +44 141 582 04 10

www.objective3.org/equalframe.htm

Sharon Thomson

s.thomson@objective3.org

Sverige (Sweden)



Ministry of Labour

Drottninggatan, 21

S-10333 Stockholm

Phone: +46 8 405 13 43

Fax: +46 8 20 31 27

www.esf.se

www.equal.nu

equal@esf.se

The Swedish ESF-Council

Box 47 141, Liljeholmsv 30 B

S-100 74 Stockholm

Phone: +46 8 579.171.00

Fax: +46 8 579.171.01

www.esf.se

Ms Inger Wijkström

inger.wijkstrom@industry.ministry.se

Mr Johannes Wikman

Phone: +46 8 579 171 30

johannes.wikman@esf.se

Mr Torsten Thunberg

Phone: +46 8 579 171 25

torsten.thunberg@esf.se

Mr Stig Wikström

Phone: +46 8 579 171 29

stig.wikstrom@esf.se

Ms Eva Loftsson

Phone: +46 8 579 171 20

eva.loftsson@esf.se

Mr Christian Råbergh

Phone: +46 8 579 171 22

christian.rabergh@esf.se

