



# Call for proposals VP/2017/015

Establishment of four-year Framework Partnership Agreements to support EU-level networks active in the areas of social inclusion and poverty reduction or microfinance and social enterprise finance, and Operating grants for 2018



# Selection procedure

**Arben Kanber – UNIT C3**  
**Disability & Inclusion**

# Basics

- Establishment of four-year Framework Partnership Agreements to support European networks active in the area of social inclusion and poverty reduction or microfinance and socila enterprise finance, and Operating grants for 2018
- Period covered: 01.01.2018 to 31.12.2021
- Deadline for application: **29.09.2017**

# Framework Partnership Agreement

- It establishes a four-year cooperation between the Commission and EU-level networks whose statutory aim is:
- ☐ for area 1: the fight against social exclusion, the promotion of social inclusion, the promotion of access to employment and the strengthening of social protection;
- ☐ for area 2: the demand or supply side of microfinance or social enterprise finance markets;

# Framework Partnership Agreement

- The FPA sets out the conditions governing grants to partners on the basis of a quadriennial strategic plan
- For implementing the partnership the Commission may award to the partners specific operating grants

# Selection process

1) Evaluation of the documentation relevant to the network's four-year action plan for 2018-2021. Selected organisations will be invited to sign four-year **Framework Partnership Agreements**.

2) For organisations selected for signing a FPA, evaluation of the network's detailed activities for 2018 and the corresponding budget. After evaluation and subject to the availability of funds, selected organisations will be invited to sign **Specific Agreements for a 2018 Operating Grant**.

# How will applications be assessed?

- Admissibility
- Eligibility and exclusion criteria
- Selection criteria (financial and operational capacity)
  - No verification of financial capacity of public bodies
- Award criteria

# How will applications be assessed?

- Scoring and award
  - Overall pass threshold = 70%
  - Minimum score per criterion = 50%
  - Applications receiving the highest scores within the available budget (EUR 9 MIO for area 1, EUR 1,5 MIO for area 2) will be recommended for award



# Evaluation procedure for FPA - Admissibility

- Applications submitted on time **(29/09/2017)**, online **and** on paper (1 original + 2 copies)
- With all the compulsory annexes:
  - ✓ Signed SWIM application form
  - ✓ Executive summary in English
  - ✓ Declaration on honour
  - ✓ Letter of commitment (for third parties)
  - ✓ Proof of registration
  - ✓ Statutes
  - ✓ Strategic plan 2018-2021
  - ✓ Annual work programme 2018
  - ✓ CV of key staff
  - ✓ List of main projects
  - ✓ Balance sheet & profit and loss accounts
  - ✓ Audit report
  - ✓ Summary balance sheet and profit and loss accounts

# Evaluation procedure for FPA - Eligibility

## ELIGIBILITY OF THE APPLICANT:

- Only **private non-profit-oriented organisations**, established in:
  - EU Member States
  - Iceland and Norway
  - Albania, the Former Yugoslav Republic of Macedonia, Montenegro, Serbia and Turkey;

# Evaluation procedure for FPA - Eligibility

- an **established formal network** with its own legal personality or representing (as a joint secretariat or officially appointed coordinator) an established formal network;
- organised at European level and have members in at least
  - **15 EU Member States** for area 1
  - **12 EU Member States** for area 2

# Evaluation procedure for FPA - Eligibility

## ELIGIBILITY OF ACTIVITIES:

### a) Geographical location:

- all **EU Member States, Iceland, Norway, Albania, the Former Yugoslav Republic of Macedonia, Montenegro, Serbia and Turkey.**
- Activities taking place **in other countries** are not eligible.

### b) Types of activities:

- activities indicated in section 2.2 of the CfP

# Evaluation procedure for FPA - Selection

## *a) Financial capacity*

- The applicant should have stable and sufficient sources of funding to maintain its activity throughout the 4-year period.

## *b) Operational capacity*

- The applicant must have the professional competencies as well as appropriate qualifications necessary to complete the proposed 4-year strategic plan.

# FPA– Award criteria

## **(a) Coherence and consistency (20 pts)**

- *In line with EaSI objectives*
- *Correspondance with EU policy objectives*

## **(b) Added value and relevance (15 pts)**

- *Voicing concerns from different EU regions*
- *Appropriate awareness raising strategy*
- *Contribute to best practices and solutions*

# FPA– Award criteria

## (c) Quality and impact (25pts)

- *Clear, realistic and detailed*
- *Relevant long-term impact (qualitative and quantitative) and contributions to policy making*
- *Result oriented*
- *Clear, targeted and appropriate dissemination strategy*
- *Evaluation and monitoring*

# FPA– Award criteria

## (d) Efficiency and feasibility (40 pts)

- *Feasibility*
- *Effective relations with stakeholders at national and European level*
- *Reasonable amounts*
- *Efficient work distribution and allocation of resources*
- *Sustainability after EU funding*



## **Operating grant– Award criteria**

- (a) Relevant to priorities and coherent with 4-year plan (20 pts)**
- (b) EU added value, dissemination (20 pts)**
- (c) Quality and impact of work programme (20 pts)**
- (d) Efficiency and feasibility, methodology, human resources, timetable (20 pts)**
- (e) Cost effectiveness, financial quality (20 pts)** *clear, detailed, realistic and reasonable budget*

# Templates: 4-year plan and 2018 work programme

- Please follow the instructions carefully
- Our aim: to give you the best chance at giving us the information we need to assess your proposals
- Be clear and concise – long proposals are not always a sign of quality

# Templates "4-year strategic plan"

Pay attention to the *Notes* as they provide information on how to fill in the SWIM online application form (see examples highlighted in yellow)

## 1.1. Short summary of the action *(max. 2 000 characters with spaces)*

List the key objectives and the main activities for the period 2018-2021, as well as the groups of persons benefiting from the activities and the expected results.

**Note:** This part should be identical to the Point "Short summary of the action" in the section "Information on the action for which the grant is requested" of the SWIM grant application form.

## 1.2. The applicant organisation and the network it represents *(max. 5000 characters with spaces)*

Provide a short introduction of your organisation and the network it represents. Describe its legal status, its vision, mission and values, and highlight the main objectives and activities.

**Note:** This part should be identical to the Point "Main objectives and activities" in the section "Operational and financial capacity" of the SWIM grant application form.

# Area 1 - Template 4-year strategic plan

| N°  | Activities planned  |                      |   |           |      |      |      |
|-----|---|----------------------|---|-----------|------|------|------|
|     | Call's priority(ies) reached  | Name of the activity | Short description of the activity   | Timeframe |      |      |      |
|     |   |                      |   | 2018      | 2019 | 2020 | 2021 |
| 1.1 | <b>Inform on Policy XYZ</b><br><br><i>*You must refer to the priorities indicated in the Call for proposals</i><br><br><i>* For "Network organisation and management" activities, if they cannot be linked to specific priorities of the Call, you may indicate: "Supporting activities"</i><br><br><i>* You may detail further the priority. For instance: "Priority XYZ – in particular, issue ABC"</i> | <b>Campaign XYZ</b>  | <p><b>The Campaign XYZ 's objectives will be to.... It will consist of..... The results will be .... The impact will be....</b></p> <p><i>*Keep it <u>short</u> but clear. Activities for 2018 mentioned here should be further detailed in the 2018 annual work programme.</i></p> |           | X    | X    |      |

# Area 1 - Template annual work programme

| Activity 1.1  |                   |                   |  |
|---|-------------------|-------------------|--|
| Name of the activity  | Date              |                   | Location of the activity                         |
| <b>Campaign XWZ</b>   | Start             | End               | <b>All EaSI countries. Event in Brussels, BE</b> |
|   | <b>01.04.2018</b> | <b>30.09.2018</b> |  |
| Link to the Call's priorities<br>(max 300 characters with space)  |                   |                   |  |
| <ul style="list-style-type: none"> <li>• <b>Priority X</b></li> <li>• <b>Priority W</b></li> </ul>  |                   |                   |  |
| Description and objectives of the activity<br>(max 500 characters with space)   |                   |                   |  |
| <b>The activity will aim to....</b><br><b>It will consist of.....</b>   |                   |                   |  |
| <ul style="list-style-type: none"> <li>• <i>Only the <u>main</u> activities for which a grant is asked should be included.</i></li> <li>• <i>An activity is not automatically equal to a single output: an activity should be a consistent piece of your work programme. You may group several outputs under one activity (ex. Campaign XWZ can consist of publication + meetings with policy makers + kick-off event)</i></li> </ul> |                   |                   |  |
| Expected outputs and impact of the results<br>(max 500 characters with space)   |                   |                   |  |
| <b>The activity will result in..... The result will be used for..... The impact will be that.....</b>   |                   |                   |  |
| <ul style="list-style-type: none"> <li>• <i>Main outputs/results should be clearly identified. Results are changes/developments that will arise from your activity. Ex: better awareness of issue XWZ</i></li> <li>• <i>The impact refers to longer-term consequences of the activities. Ex: decrease of problems linked to issue XYZ</i></li> </ul>  |                   |                   |  |

# Area 2 Template 4-year strategic plan

**Priority 1. Supporting the Commission in its outreach activities at EU, national and local level with the aim of ensuring the implementation of European policies in the relevant area (e.g. Programme for Employment and Social Innovation, European Social Fund, Social Business Initiative, Start-up and Scale-up Initiative, etc.)**

| Strategic objective  | Planned activities   | Timeframe |      |      |      |
|--|--|-----------|------|------|------|
|  |  | 2018      | 2019 | 2020 | 2021 |
| The desired or needed results to be achieved by a specific timeframe. An objective consists of the benefits that an organisation expects to achieve as a result of spending time and exerting effort to complete a number of key activities.<br>E.g.<br>- Increase awareness of certain stakeholders about EU policies/actions | Present the strategic planning of your activities, which will set the framework of the specific activities of each year. You are not expected to present a detailed planning of the annual activities. | x         | x    | x    |      |
|  |  |           |      |      |      |
|  |  |           |      |      |      |

# Area 2 Template annual work programme

**Priority 1. Supporting the Commission in its outreach activities at EU, national and local level with the aim of ensuring the implementation of European policies in the relevant area (e.g. Programme for Employment and Social Innovation, European Social Fund, Social Business Initiative, Start-up and Scale-up Initiative, etc.)**

| STRATEGIC OBJECTIVE  | OUTCOMES | OUTPUTS (please quantify) | ACTIVITIES | TIMEFRAME PER ACTIVITY (mm/yy) | RESSOURCES AND PROVISIONAL BUDGET PER ACTIVITY (detailed breakdown) |
|--|----------|---------------------------|------------|--------------------------------|---|
| Instructions on the content of the cells are provided on page 2 of the template. |          |                           |            |                                |   |
|  |          |                           |            |                                |   |
|  |          |                           |            |                                |   |
|  |          |                           |            |                                |   |

# Indicative timetable

| Stages    |   | Date or indicative period       |
|-----------|---|---------------------------------|
| <b>a)</b> | Publication of the call                                       | <b>July 2017</b>                |
| <b>b)</b> | Deadline for submitting proposals                             | <b>29 September 2017</b>        |
| <b>c)</b> | Evaluation period (indicative) FPA                            | <b>October - November 2017</b>  |
| <b>d)</b> | Information to applicants FPA (indicative)                    | <b>November 2017</b>            |
| <b>e)</b> | Signature of FPA (indicative)                                 | <b>December 2017</b>            |
| <b>f)</b> | Evaluation period (indicative) annual operating grant 2018    | <b>November - December 2017</b> |
| <b>g)</b> | Information to applicants – annual operating grant 2018       | <b>January 2018</b>             |
| <b>h)</b> | Signature of the specific annual grant agreement (indicative) | <b>February 2018</b>            |
| <b>i)</b> | <b>Starting date</b>  | <b>1 January 2018</b>           |



# Financial provisions

**Ludo Sellekaerts – UNIT F4  
Programme Management &  
Implementation**

# Information sources

- See Financial Guidelines for Applicants and model Framework Partnership Agreement and Grant Agreement for details on financial conditions (eligibility of costs, obligations of beneficiaries, pre-financing payment procedures, procurement procedures, reporting, etc.)

 *Read carefully*

# Eligible Costs

- To be eligible costs must be:
  - incurred during the duration of the work programme
  - indicated in the estimated overall budget
  - necessary for the implementation of the work programme
  - identifiable and verifiable = real costs (except daily allowance)
  - reasonable and justified (sound financial management)
  - Comply with tax and social legislation

# Estimated Budget

- Staff costs: do not fill in names
- Travel, accommodation and subsistence allowances: in line with beneficiary' usual practices
- Catering: include in heading 3 under "other costs"
- No double funding: not include costs related to another grant
- No indirect costs

# Subcontracting

- Specify in SWIM what will be subcontracted and how
- If decided after submission seek prior approved of Commission

# Subcontracting (2)

- General principles:
  - Not core tasks of work programme
  - Justified and necessary for implementation work programme
  - Best value for money
  - Transparency
  - Equal treatment

## Subcontracting (3)

- General principles (2):
  - Absence of conflict of interest
  - *Ensure that Commission, ECA and OLAF can exercise their rights under article II.27 also towards beneficiary's contractors*
  - *If not compliant, costs may be considered ineligible*

# Q&A

**More questions later? Contact:**

[EMPL-VP-2017-015@ec.europa.eu](mailto:EMPL-VP-2017-015@ec.europa.eu)