Setting up systems for measuring and reporting on project and programme progress

Trainer: Shaun Henry

Director, Managing Authority, Special EU Programmes Body, Northern Ireland (UK) and former Twinning Adviser, Romania

Why it is important?

Managing Authority

Monitoring Committee

Monitoring - The Role of the Monitoring Committee (PMC)
Article 47 CPR 1303 /2013

- meet at least once a year;

- review implementation of the programme;

- progress made towards achieving the objectives of the programme;

Monitoring – The role of the PMC

- financial data;
- common and programme-specific indicators, including changes in the value of result indicators;
- progress towards quantified target values;
- progress towards the milestones defined in the performance framework;
- the results of any qualitative analyses.

Monitoring - role of the PMC
(Article 110 CPR 1303 /2013)

(a) any issues that affect the performance;

(b) evaluation plan and the follow-up;

(c) communication strategy; (see Article 116 CPR 1303/2013)

(d) implementation of major projects;

(e) implementation of joint action plans;

Monitoring - role of the PMC
(Article 110 CPR 1303 /2013)

(f) equality;

(g) sustainable development;

(h) ex ante conditionalities as relevant

(i) financial instruments.

EIPA

PMC shall examine and approve…

annual and final implementation reports;

communication strategy and any amendment of the strategy;

any proposal by the managing authority for any amendment to the operational programme.

Promoting **partnership** - PMC

- Balance of membership
- Training of members
- Clear rules of procedures
- Agenda
- Papers
- Minutes - action points
- Feedback to sector
- Observers

Monitoring - the role of the Managing Authority
Article 125 CPR 1303/2013

> support the work of the PMC provide it with the information it requires to carry out its tasks;

> draw up and, after approval by the monitoring committee, submit to the Commission annual and final implementation reports;

Managing Authority- data management

- establish a system to record and store in computerised form data on each operation necessary

- monitoring, valuation, financial management, verification and audit, including data on individual participants in operations, where applicable;

Previous experience and issues

- *Large discrepancies between targets in the OP and achievements;*

- *Modifications required to Operational Programme;*

- *"Over achievement" due to definitional issues;*

- *"Under achievement" due to poor alignment of selection procedure to operational programme;*

Previous experience and issues

- *Large number of indicators;*
- *Data collection end loaded towards the end of the programme period;*
- *Financial indicators dominated discussions;*

EIPA

Data quality – What are the challenges?

- Data accuracy

- Data comparability

- Timeliness of collection

Data accuracy

- Need to have system that accurately records data;

- System must enabling checking and verification;

- System must allow for correction of data;

- Must have clarity on responsibility: *project; intermediate body; Managing Authority*

Data comparability

- Common indicators must be consistent across all Member States

- Programme indicators must be consistent across all operations

- Other indicators may be tailored to a specific operations.

Definitions are key: ERDF example

CO 24: Number of new researchers in supported entities:

- *Fully time equivalent (FTE)*
- *Gross new working positions (not counting origin of worker , provided total number increases)*
- *New or existing entity*

Definitions are key: ESF example

C02: Long term unemployed

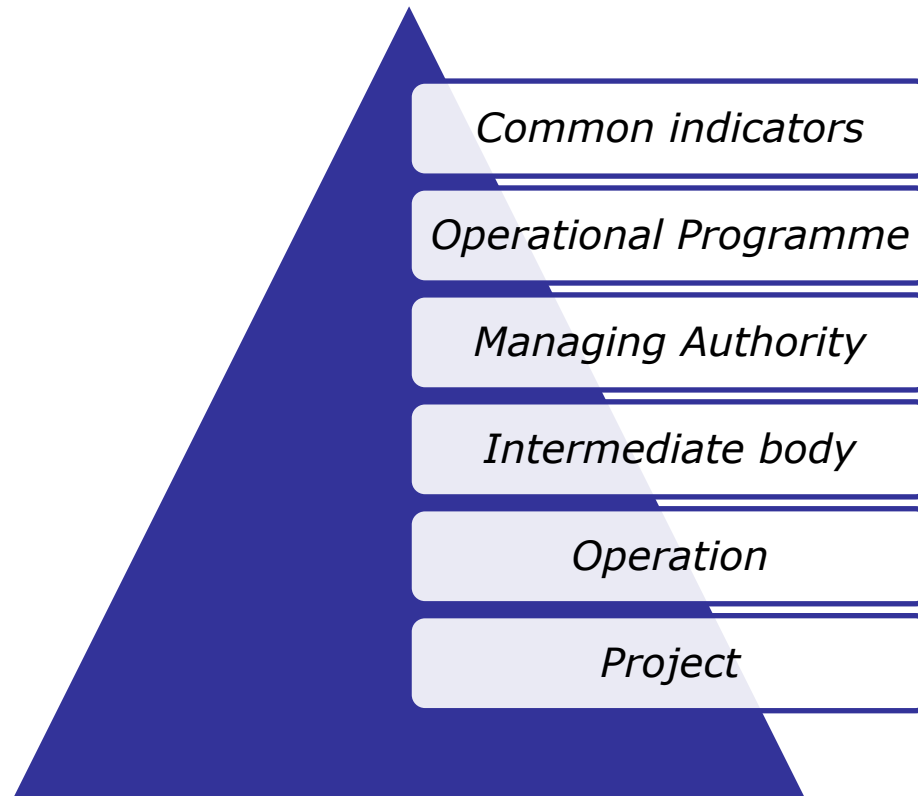youth < 25 years, more than 6 months continuous unemployment

Adult > 25 years, more than 12 months continuous employment

Age based on date of entry into operation

Term unemployed defined in CO1

Shared definitions are key:

Common indicators

Operational Programme

Managing Authority

Intermediate body

Operation

Project

Data collection – timeliness.

- Regular updates to inform PMC meetings

- Update to inform AIR

- Completed operations - different approaches for ERDF and ESF

EIPA

Using data for reports

- Need to supplement formal achievements against targets

- Include value of contract issued

- Achievements against contracts issued.

Quality assurance of data

Quality assurance of data:

Include in call for proposals

Issue clear guidance notes during implementation

Training to projects on data recording and data entry

Management verifications to check completeness and reliability

Use on-the sport to check data entry

End