

Better reporting, monitoring and evaluation skills

*Making sound reports and evaluations from activities to outputs,
results and impact with digital and participatory solutions*

23-25 October 2023

Porto

By Franck SOTTOU

Raili Truup

Better reporting, monitoring and evaluation skills

- **Target Group**
 - Managers or responsible experts in designing or running some piece in public financial management, for example in:
 - Budgeting departments
 - Strategic planning departments
 - Managing Authorities / Certifying Authorities
 - Policy experts designing public grants no matter from EU or state funds
 - Financial reporting departments
- **Methodology**
 - Illustrated Lectures, Practical examples insisting on **annual implementation report**
 - Discussion and practice sharing between participants.
- **Output and immediate results**
 - Presenting new guidances for monitoring and evaluation
 - Looking to the best practices for mixing specific and common/core indicators
 - Getting key alerts about possible baselines and targets
 - Linking in a better way programming / selection / contracting / verification & closure
 - Linking in a better way monitoring and verification for impact assesement
 - Linking in a better way project and programme management
 - Focusing on data collection at project and programme level
 - Improving financial, technical and administrative reports and checks altogether
 - Insisting on indicators, correction of errors, and dialogue with beneficiaries
 - Specific attention paid to the quality and consistency of data in IT systems



Raili Truup

Senior Consultant on designing digitally led PFM systems

Estonian Tax and Customs Board **has now been years one of the most effective in the global comparison.** I was a member of the development team in the beginning of the change process that has brought us there. The key of that transformation was and still is **the usage of risk analysis in decision making.**

Estonian Management Authority of **EU Structural Funds got payment stop from European Commission in 2011** due to the deficiencies **in decentralized management and control system.** I was the designer of the solution that opened most of the payments in less than 6 months.

Performance based state budgeting is complex development Project in the field of states strategic development, development of public services and digitally-led systems.



Franck Sottou

Senior International Management and Control Expert

- Key international Expert
 - Management and control systems
 - Indicators and performance measurement (data collection)
 - Simplification and economical, social and environmental strategies
- Former Head of TA Team
 - Programming, negotiations with EC, management & control systems
- Trainer and Consultant for European Institutions, Managing and Certifying Authorities, IB and Implementing Agencies
- Currently working for Member States for technical assistance
 - Design of logframes and selection of indicators
 - Calculation and implementation of SCOs
 - Recommendations about simplification and efficiency of systems

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DAY 1 : More logical and integrated use of indicators

Registration

9.00am to 9.30am

Morning session

9.00am to 12.30pm

Step 1: Laying the foundations by linking Reporting, Monitoring & Evaluation

- Traditional and modernised Intervention logic
 - the rationale for greater results orientation
- How indicators connect projects, programmes and policies
- How to balance common and specific indicators : feedbacks

Step 2: Anticipating future evaluations in a clever way

- Outputs and efficiency: examples
- Results effectiveness and impact assessment: examples
- Improving coherence in indicator systems and data collection

Lunch from 12:30pm to 2:00pm

Afternoon session

2:00pm to 4.30pm

Step 3: Focusing on common indicators

- Specific-funds common indicators
- The changes and open issues for 2021-2027
- Common/Core output and results indicators, baselines and targets
- Specific reporting conditions about participants and entities

**Registration and welcome coffee: 9:00-9:30*

15-minute breaks at 10.30am and 3.15pm

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DAY 2 : Better use of IT tools and digital solutions

Morning session
9.00am to 12.30pm

Step 4: Specific use of IT for public grants and policies in the context of RRF and OPs

- Main tools and use of IT all throughout the process
- Improvements of system using IT
 - Person before tech – the design principles
 - Interoperability of IT systems
 - Data management basics
 - Latest tech solutions trending in practice
- Important implications in practice
 - ✓ Shifting from document-based to data-based approach
 - ✓ On-going data collection and management
 - ✓ Agile way-of-working

Lunch from 12:30pm to 2:00pm

Afternoon session
2.00pm to 4.30pm

Step 5 : extension of EU funds practices to Budget planning

- Definitions and key issues
- Components of PFM and PFM 2.0
- General Budgeting Process Cycle
- IT tools and data collection
- E-solutions and government
- 10 core dimensions of budgeting

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DAY 3 : Better data collection and presentation involving partners

Morning session

9.00am to 12.30pm

Step 6: Focusing on impact assessment

- The data collection methods : from statistics to questionnaires and surveys
- The focus on changes at sector level: examples
- Common/Core indicators: examples applied to different sectors and intervention types and first assessment of impact in line with new definitions

Lunch from 12:30pm to 2:00pm

Afternoon session

2:00pm to 4.30pm

Step 7: Dealing with reporting in 2021-2027

- Reporting types and methods: linking the reports from beneficiary to annual reports and sizing-down the text to the point
 - Better involvement of beneficiaries and target group members
- Planning for effective communication: examples of graphics / illustrations

Step 8: Full action plan for better identification and reporting

- Balance specific / common
- Baselines and targets
- Functions and responsibilities

*(*15-minute break at 10.30am and 3.15pm)*

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Days	Total net amount €	Discounts	Including
Face-to-face			
3-day	1305	15% early registration (up to 2 months before the event) ; 10% for 2 or more participants from the same institution	breaks, lunches, full access to ETCP platform and quizzes, certificate of qualification
discounted 10%	1174,5		
discounted 15%	1109,25		

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