

Top 5 tips on Project Management and Monitoring from the CFP

1. Ensure robust grant systems are in place prior to commissioning projects

- Be familiar with the funding regime for which your grant management system is intended (ensure you thoroughly read all applicable notes and guidance).
- Allow plenty of time to set up the system, taking account of relevant consultations and testing.
- Formulate a uniform system of reporting to ensure consistency and that all your delivery partners are treated equally.
- Where possible, design reporting templates for delivery partners to use (i.e. to report spend, report outputs, registration forms, grant proposal form, etc).

2. Conduct systematic and detailed appraisals of all project / grant applications

- Ensure your project appraisal process is structured (using pre-designed application forms and templates) and that the functions of project **appraisal** and project **approval** are separate (and performed by different people).
- Consider appraisal tiers so that projects of different values are given the appropriate time and resources.
- Allow plenty of time to conduct appraisals so that they are not rushed through the approval process and plan well in advance of receipt and be prepared to liaise frequently with the project applicant to resolve questions, to negotiate and to conduct an appraisal visit to the delivery partner if necessary.

3. Develop clear and practical written guidance for your delivery partners outlining your expectations about projects as well as contractual obligations

- Provide comprehensive training to your delivery partners and always be at hand to offer advice, information and guidance
- During training, give demonstrations of any forms or templates that you expect your delivery partners to use.
- Suggest that delivery partners ask questions freely during the training session and always encourage feedback on your systems and processes to make improvements.
- Once the project is underway, be available to offer advice, information and guidance and always encourage feedback throughout the lifetime of the project.

4. Use a co-ordinated and systematic approach to the monitoring / implementation of projects and collation of management information

- Develop a structured monitoring framework that uses reporting timetables so that delivery partners are well informed of their obligations and deadlines.
- Conduct regular reviews and implementation visits to manage risks and ensure that you are familiar with the delivery partner's internal processes and procedures.
- Consider telephone spot checks - useful for confirming payment of invoices from suppliers and ascertaining that beneficiaries actually attended a project.
- Where possible, use a customised management information system (MIS) to record your project interventions (outputs) and ensure that this system conforms to the requirements of your funding regime(s).
- Treat financial and output information as confidential and, if required, disseminate in accordance with applicable data protection legislation.

5. Ensure effective closure of a project once it has ended or have an agreed system in place for an extension

- All parties should know when projects will end and any end of contract compliance (e.g. retain project-related documents for 7 years).
- Conduct an end-of-project / programme evaluation to ascertain lessons learned, gather feedback or plan future activities.
- In the case of a project extension, delivery partners should always submit a further grant application and undergo another project appraisal / approval process as indicated above.