# Grants

## Management and Monitoring

## System

## What is EGREG?

EGREG is an interactive web platform designed to assist key players in a grants fund programme (donors, managing authorities and beneficiaries) in implementing and monitoring grants projects; it has been developed by a group of experts while working in the field with the aim to ensure:

- ✓ Visibility of grants projects
- ✓ Availability of an efficient communication platform
- ✓ Usage of standard templates for reports and requests
- ✓ Usage of standard and/or simplified templates for procurement procedures
- ✓ Providing the beneficiaries and the managing authority with early warnings about potential problems
- ✓ Providing the managing authority with necessary tools to monitor all projects without delays
- ✓ Increasing the efficiency of processes for handling beneficiaries' requests
- ✓ Applying correct financial rules, accordingly to the Donors and Managing Authorities rules and regulations
- ✓ Easy and quick access to projects documents and deliverables

EGREG covers the whole life cycle of the grant programme starting from the publication of the call for proposals (and all related guidelines and instructions), up to the closure of grants projects and the whole programme including projects auditing and Results Oriented Monitoring activities and reports. EGREG has been used since 2009 and is currently in use by different Pillar assessed Organizations/Foundations as Managing Authorities and Member States Agencies.

The system is composed of several modules that can be customised and deployed independently or as a whole system:

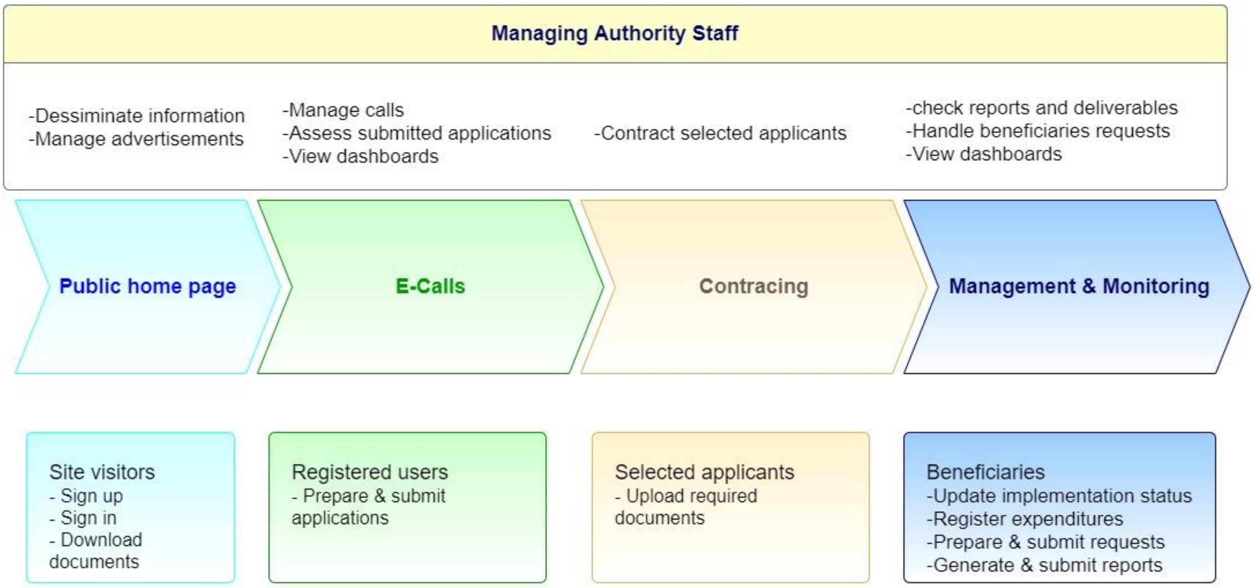
**A) The public facet**: is a dedicated public web page where the managing authority can publish new calls for proposals and all documents, templates and guidelines related to the call.

It can be also used to disseminate information about the programme as well as about individual projects (e.g. success stories, projects fact sheets…etc.) to increase the visibility of the programme and its achieved objectives.

**B) E-Calls module**: this component covers the whole application process in its 2 variants: single-step process (Full Applications only) or 2-steps process (Concept Notes followed by Full Applications). This module includes the administrative check and the technical assessment/scoring of submitted CNs/FAs.

The E-calls module can be enriched with a "Partner search" facility where applicants can upload their profiles in order to find the best partners and/or be found by other applicants looking for partners.

**C) Projects Management and Monitoring module**: this module is used during the implementation of grants projects by: 1) the grantees who can follow-up the implementation of their projects to register projects artefacts (technical & financial), and 2) the managing authority to monitor projects progress on both technical (tasks and indicators) and financial (expenditures) aspects.




**EGREG modules and users**

## THE PUBLIC FACET


The public page(s) are delivered with a simple and easy-to-use control panel that allows the managing authority to manage the information displayed including the publishing of:

1. A new call for proposals with its related documents (guidelines, templates, annexes, examples, webinars and tutorials, …etc.).
2. Announcements or advertisements (corrigenda, information sessions schedules, assessment results…etc.).
3. Instructions and user manuals to potential applicants (how to register, how to apply…).

## E-CALLS MODULE

The registered applicant is given access to the system through a dedicated account where they can access online application forms for open calls.

The application form (for both concept notes and full applications) is controlled by the system to ensure:

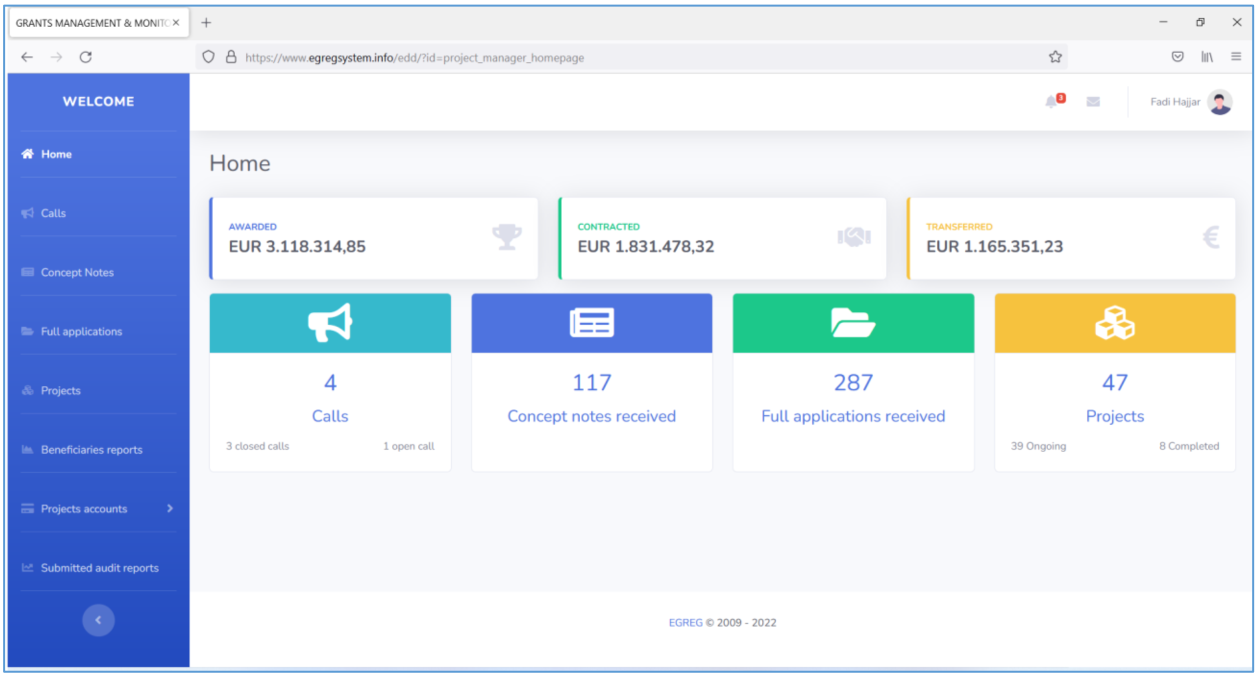
1. Integrity of data entered (drop-down lists, check boxes & radio buttons are used wherever possible to minimize data entry and protect users from errors),
2. Respect of rules indicated in the call guidelines (start/end dates of the action, grant rate, budget structure and constraints…etc.),
3. All required fields are filled-in, and
4. All supporting documents are uploaded and attached to the application form.

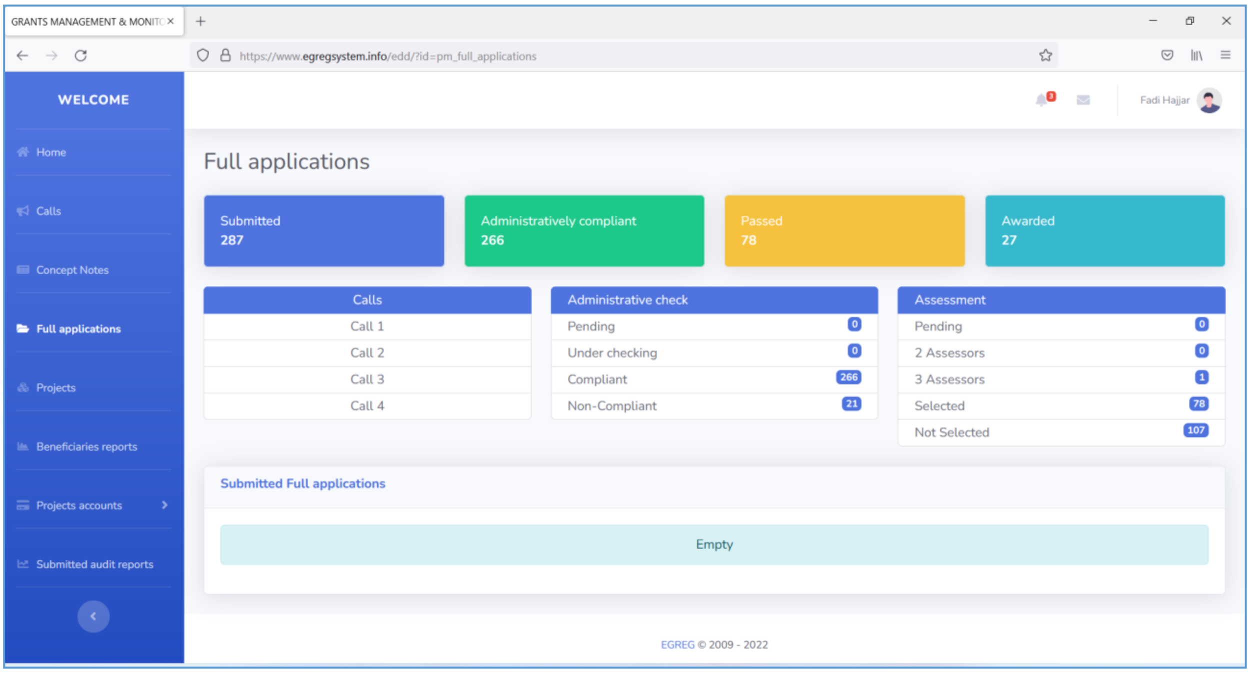
The system assists users using 2 alerts mechanisms:

- Instant on-screen alert (if, for example, the grant amount is out of the accepted range)
- A “Check my application” function that validates the form against guidelines rules

The managing authority has access to the E-calls module with the following functions:

1. View instant dashboards summarizing the status of the call (number of submitted applications, number of administratively compliant, number of applications proposed for awarding…etc.)
2. Assign submitted applications to a set of assessors to perform the administrative check.
3. Assign administratively compliant applications to evaluators to perform the technical evaluation and scoring using an automated evaluation grid.
4. Generate, based on the final scores and on the score threshold set in the guidelines, the evaluation results.
5. Generate results report.
6. Inform applicants about selection results.



## Projects Management and Monitoring module

This module is used during the implementation of grants projects by grantees, the managing authority users and external evaluators/auditors for post evaluation of projects.

**Grant project users:**

The grantee (the project coordinator and his partners) can easily follow-up the implementation of their projects on both technical and financial sides.

**Technical management:**

1. Update status of action plan tasks to reflect progress.
2. Update achieved indicators values (and/or target groups).
3. Upload outputs/deliverables linked to the action plan.
4. Update the project action plan with respect to rules and procedures set by the managing authority.

**Financial management:**

1. Register project expenditures and upload copies of supporting documents: the system checks the expenditure data against the contractual budget and alerts the grantee (and the project monitors) in case of potential problems.
2. Perform budget reallocations (with respect to flexibility percentage and rules set in the guidelines).
3. Prepare and submit grant tranches payment requests.

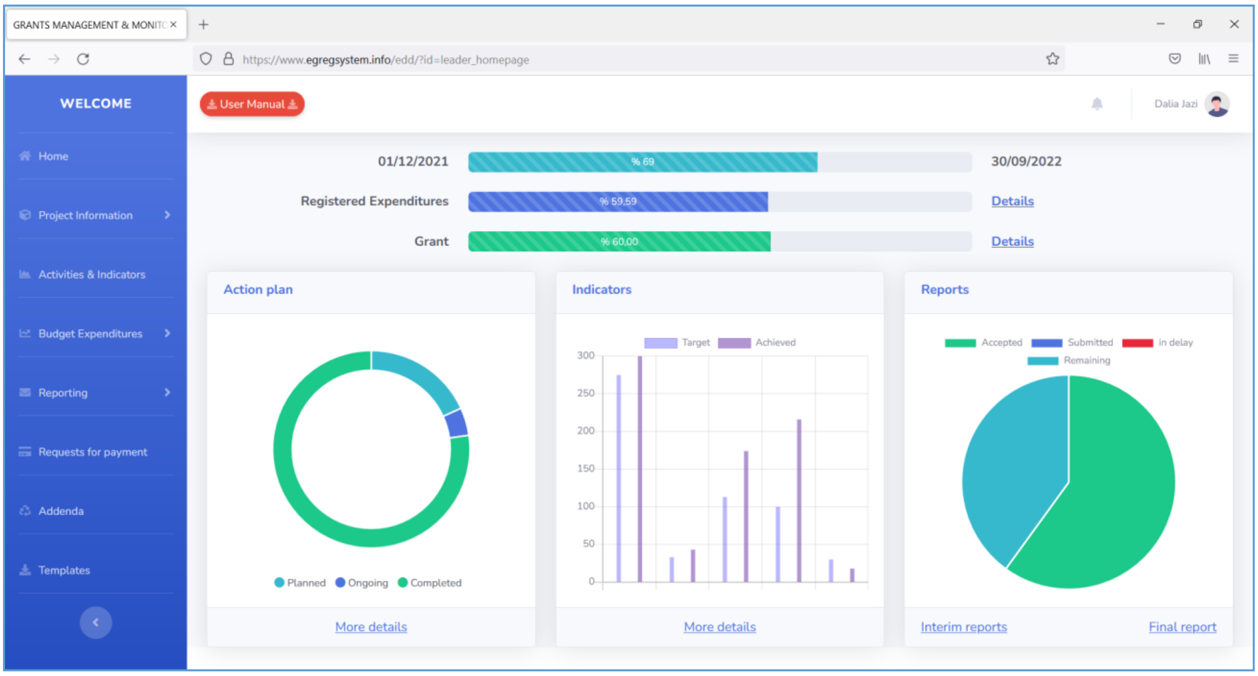
**Reporting:**

The system alerts the user when an interim or final report is due and it supports generating the report in its both parts:

- The technical/narrative part: it can be either generated according to the action plan where the grantee can comment activities and deliverables, or uploaded into the system using a template provided by the managing authority.
- The financial part: it is automatically generated based on expenditures (and reallocations) registered by the grantee.

**Change management:**

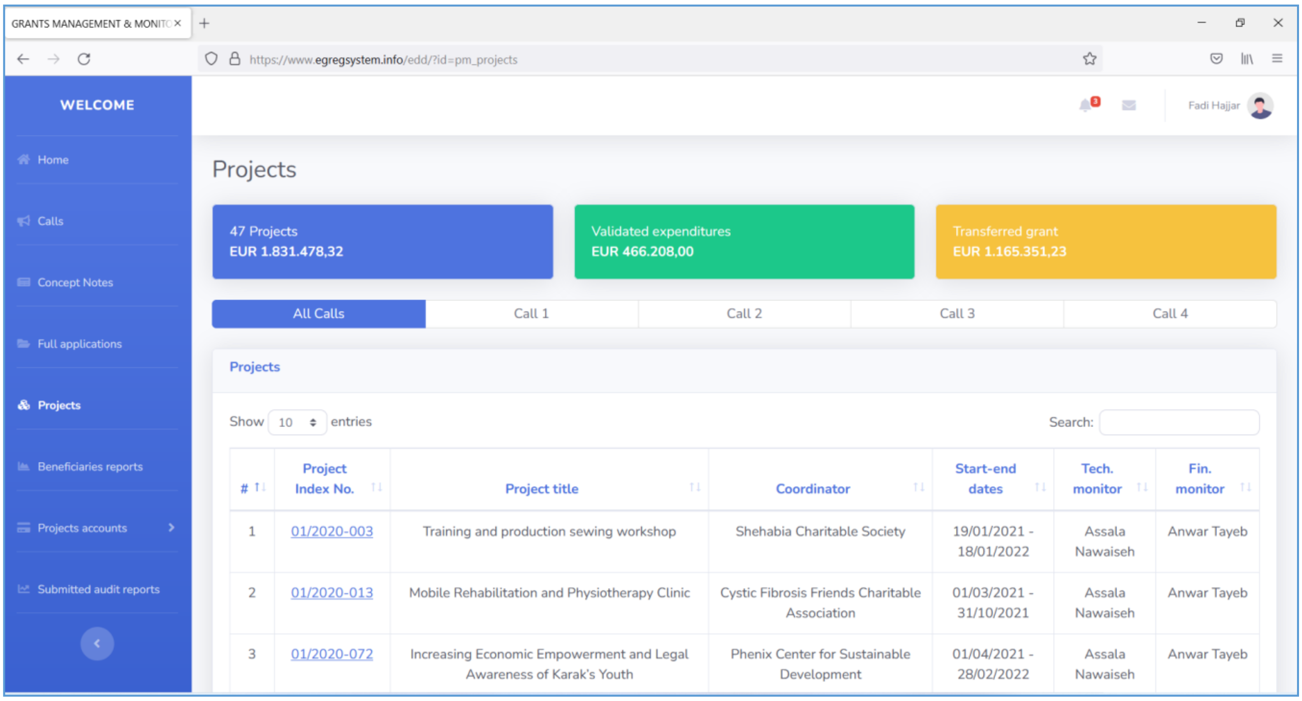
Grantees can prepare and submit requests for addenda through the system according to templates and flows required by the managing authority.




## Managing Authority users:

Users from the managing authority side can be classified in several groups/roles according to the organisation of their staff. In general, and during the implementation phase, the following roles are provided: Programme Manager (or Administrator), Technical Monitors, Financial Monitors, and Auditors.

### Programme Manager:




The Programme Manager represents the highest authority level of the managing authority and is provided with the following features & functions:

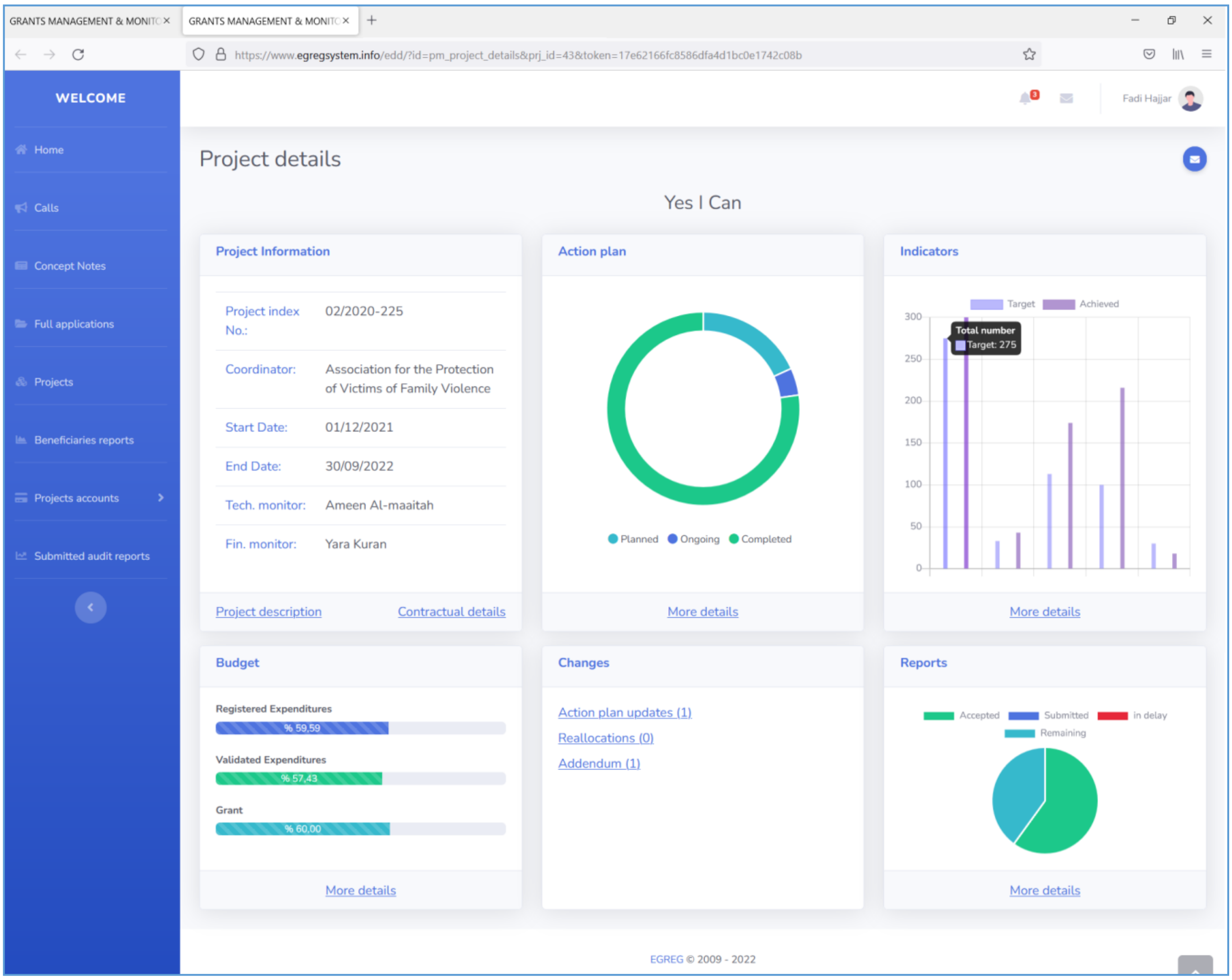
1. View overall aggregated statistics on all projects (dashboards)

2. Monitor the activities of technical and financial monitors (get notified when requests and/or reports submitted by beneficiaries are not validated by monitors).
3. Assign projects responsibilities to technical & financial monitors.
4. Check change requests after being validated by monitors.
5. Check and validate payment requests (after being validated by financial monitors)
6. Communicate with projects monitors.

**Technical Monitor:**

Each technical monitor may be responsible for one or more projects and is provided with the following features & functions:

1. Access all project details, artefacts and deliverables.
2. Get alerted when a project is in delay vs its action plan and when a report is in delay.
3. Check and comment narrative/technical reports (interim & final) submitted by the project.
4. Validate action plan updates performed by the project coordinator.
5. Check and validate change requests submitted by the projects.
6. Send notifications to the project coordinator.
7. Communicate with the Financial monitor and the Programme manager.



**Financial Monitor:**

Each financial monitor may be responsible for one or more projects and is provided with the following features & functions:

1. Access all project details, artefacts and deliverables.
2. Get alerted when a registered expenditure may cause excess of allocated funds (on the budget line and/or budget heading level).
3. Get alerted when a reallocation of funds is performed by the project coordinator.
4. Get alerted when a report is in delay.
5. Check and comment financial reports (interim & final) submitted by the projects.
6. Check and validate change requests submitted by the projects.
7. Check requests for payments submitted by projects coordinators.
8. Send notifications to the project coordinator.
9. Communicate with the technical monitor and the programme manager.

**Auditors:**

Auditors maybe internal (from the managing authority staff) or external (from independent auditing firm). Completed projects can be assigned to auditors to check and validate project expenditures to calculate and verify the eligible grant amount.

## Complementary Services

- ✓ **Customisations:** As each grant fund may have its own templates and rules, our IT team, supported by our grants experts, is available to customise and tailor the system to the specific needs of the fund including the calculation of KPIs needed by the managing authority.
- ✓ **Training:** Webinars and/or hands-on training can be organised for all groups of users. With its friendly and easy-to-use interface and the online documentation, EGREG proved to be an easy-to-learn software system.
- ✓ **Technical support and maintenance:** a technical team is allocated to resolve and track technical issues during the whole grant programme implementation period.
- ✓ **Remote assistance:** Users (from all groups) are provided with a Help Desk facility to submit their enquiries, both technical and administrative, to a backstopping team ready to answer their questions.