

## PAOM Project Engagement Visit Procedure v 6.07.09

# Project Engagement Meetings and Visits

### **Purpose of the Project Engagement Meetings**

These are not an RDPE mandatory or regulatory requirement and some discretion can be used in how to inform projects on operating within the guidelines. Wilts Council (the Accountable Body) and Plain Action believe that time and resource should be made available to ensure projects start off in the right direction, and that carrying out and following up a PEV is the best way of achieving this.

**South West RDA guidance states:** “The discussion should focus on the project-holder’s plans to undertake the project. Any grey areas, such as the potential to stray into ineligible activity or expenditure, should be highlighted. The project-holder should be reminded of the importance of sticking to the agreed schedule of project activity as far as possible, and should be strongly advised to seek advance approval of any variations. Guidance should also be provided on the project-holder’s responsibilities in respect of procurement and state aid considerations.”

### **Project Engagement Meetings (PEMs) – between approval and start**

**A Project Managers Guide** will be made available during the application process. It will be formally issued to the Project Manager after the LAG has received a signed Project Offer Letter and prior to the Project Engagement Meeting takes place.

**A Project Engagement Meeting (PEM)** will be organised for all new Project Managers before the project starts. This may take place on an individual basis or with a group of Managers (maximum 8, more usually 3-4). At this meeting the Managers will receive copies of the Claim form, including progress report, and a CD of the required funders’ logos. They will receive a PEM Record to be completed by themselves during the meeting. A member of the LAG Management team will work through all the section of the PEM Record which will cover the key points of the Project Managers’ Guide, encouraging discussion and debate amongst the Project Managers and the sharing of skills and systems where appropriate.

Whilst completing the PEM Record the Managers will note on the final page the Actions they feel are required to support their robust management of the project. These will be individually discussed with the member of the LAG management team Present, agreed and signed off at the end of the meeting.

Copies of the signed PEM Records will be made, one kept by the Project Manager and one date stamped and filed in the LAG Manager’s Project File.

The identified Actions will be completed wherever possible prior to the Project Engagement Visit (below).

## **Project Engagement Visits (PEVs) – after start and on site**

**A Project Engagement Visit** will subsequently be carried out on site for each project, either six months after the start of the project or half way through, whichever comes sooner. Timing these visits to occur 6 months after the Project Engagement Meeting enables the Project Managers to have worked through at least one claim period, and so be able to identify any problems or issues that have arisen.

In carrying out a PEV it is expected that:

- It is carried out by a member of the LAG management team.
- The project manager must be present at the meeting (other staff can be present, but it should not go ahead without the project manager)
- The Actions identified and agreed at the Project Engagement Meeting will be reviewed to ensure they have been or are in the process of being completed, and identify any issues that have arisen.
- The visit is thorough and both parties leave the meeting confident that the project will be managed and administered to the best possible standards.
- That where necessary recommendations are made by the LAG officer and communicated with the Project Manager and that these are followed up.
- That the LAG identifies any systemic problems with the existing administration of RDPE in Wiltshire and these are flagged to the Accountable Body Programme Manager and other relevant bodies, such as the RDA EU Monitoring Team in due course.

Particular attention will be made for the LAG representative to talk the Project Manager through the claims process, particularly the requirement for evidence of expenditure. The claim that the Project will have already submitted by that point will be discussed to ensure all appropriate systems are in place for robust financial management. Particular care will be taken to discuss eligibility and evidence of expenditure requirements relating to any overheads or staff costs.

**Documentation of the visit is necessary.** The PEV record will be updated and highlight any outstanding or further issues that need clarification or indicate a training or learning issue for LAGs, projects managers or organisations, the Accountable Body or anyone else involved in the RDPE.