Practical Guide
Dos and Don'ts for CSOs

January 2025

#ReLOaD

Contents

Preface

Civil society organizations play an important role as partners to central level authorities and international accountability mechanisms in our shared mission to strengthen participatory democracies and the EU integration process in the Western Balkans by empowering civil society and youth to actively take part in decision making and by stimulating an enabling legal and financial environment for civil society. These guidelines have been developed by the ReLOaD[1] team in Kosovo[*], a regional project financed by European Union and implemented by UNDP in partnership with the partner local governments. The guidelines are addressed to civil society organizations in support of their independent and common efforts to improve and complement the informal and formal public services and processes responding to their community needs and opportunities. Specifically, the guidelines address how such efforts may best be directed when they are intended to these goals. This is not a manual -rather, it sets out a series of proposed "do's and don'ts" from the perspective and advice of the team directly engaged in the filed with the CSOs during a period of eight years, facilitating the inclusive planning, cooperative implementation and transparent monitoring and reporting and more importantly promoting healthy partnership with the local governments, CSOs and communities.

The aim of these guidelines is to ensure that the lessons learned from this process and the joint practical solutions are disseminated among the CSOs, institutions and donor organizations to guide and help the similar processes beyond the ReLOaD timeframe and beyond the partners who were part of this joint process.

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[1] References to Kosovo shall be understood to be in the context of United Nations Security Council resolution 1244 (1999).
[*] For the European Union, this designation is without prejudice to position on status and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

Regional Programme on Local Democracy in the Western Balkans

2017 – 2024

The **EU** accession agenda in the region promotes the role of **CSOs** in advancing democratisation. This includes consultation in **decision-making**, contribution to processes associated with **policy and regulatory changes** and promoting **public accountability**. The **ReLOaD Programme** in the Western Balkans has been ongoing since 2017 with the second phase concluding in January 2025, in six jurisdictions across the region.

Donors
European Union, Local Institutions, UNDP.

Beneficiaries
Central and Local Institutions, Central and Local Cultural Institutions, Micro and Small Businesses, Communities.

Partners
European Union, Local Institutions, Civil Society, Office of Good Governance/Office of the Prime Minister, Ministry of Local Government Administration, Ministry of Internal Affairs, Ministry of Finance, Labour and Transfers, Association of Municipalities, CiviKos.

16.000 Individuals
benefited from 90 Projects implemented at the local level in two phases.

587 people trained in Project Cycle Management
including Municipal Representatives, and CSOs representatives.

1,000+ participants
in 24 youth-led Initiatives implemented multi-sector projects in health, environment, education, and culture, addressing community needs.

98 Young Jobseekers
received vocational training, with 17 employed at local companies, 20 employed elsewhere, 47 actively seeking employment, and 14 successfully self-employed.

75 Interns
of these, 10 secured positions in municipal departments, 13 in other organizations, 7 pursued education or seeking opportunities, and 45 completing it now.

11 Local Governments & CSOs
established partnerships, improved local services, aligned them with community needs, and fostered responsive, participatory local democracy.

Budget
EUR 2,270.096

Access **www.undp.org/kosovo** or scan this QR code for more information on UNDP's work:

1. Planning

1.1 *Pre-designing phase*

To ensure an inclusive and effective process prior to project design, it is essential for both municipalities and Civil Society Organizations (CSOs) to actively collaborate. Firstly, capacity building should be prioritized for both parties by providing training and information on specific topics related to upcoming projects and public calls for CSOs. Additionally, organizing public hearings with open consultations allows local communities to participate in the decision-making process. It is crucial to have monitors and observers from civil society present during the public hearings to ensure transparency, all-inclusiveness and accountability. People's opinions and suggestions must be taken seriously and considered as a key component in the pre-design phase of initiatives. This approach not only builds public trust but also contributes to the creation of projects that are more appropriate and sustainable for the community.

Civil society organizations (CSOs) play a vital role in promoting transparency, accountability, and community engagement. To maximize their impact, CSOs are encouraged to actively participate in planning processes, budget hearings, by being involved in gender responsive budgeting initiatives. By shaping strategies that promote equality and observe the allocation and use of public resources, CSOs can align their efforts with the priorities of the communities they serve. Furthermore, their involvement in public discussions organized by local governments within their areas of operation or intend to be engaged. This active involvement allows them to contribute valuable insights and advocate for the needs of their communities.

Furthermore, CSOs should consider joining informal independent groups or observer bodies to monitor public institutions' activities, ensuring accountability, and building trust. Regularly reviewing and consulting local and central level strategic documents is also essential for identifying opportunities to intervene or contribute effectively. Equally important is maintaining a deep understanding of the communities and target groups they serve. Through continuous mapping of threats and opportunities, CSOs can remain adaptive, address pressing challenges, and develop strategies that align with the evolving needs of their stakeholders.

■ The CSO should be part of the priorities and thematic fields proposal and definition process for different calls of proposals, as it was the case with ReLOaD, to ensure their alignment with the needs in the field.

During these processes, the local governments implementing regular support schemes to CSOs should enable an appropriate inclusive environment for cooperation and ensure transparent and effective communication mechanism are continuously in place.

- Participate in planning and discussion at the local level and be active in providing feedback.

- Request the inclusion of priority needs in the municipal agenda and ensure that pressing issues at the local level are brought to the attention of decision-makers.

1.2 Project design

Knowing the situation and being clear on the interventions required, the CSO will easily position its role in the process of designing the solutions and become the key stakeholder in facilitating the required actions in this regard.

At this point the CSOs shall pay attention to the alignment of their project proposals and its activities with the respective priority theme/s of the Call/s, to avoid the disqualification of the proposed project during the evaluation of its relevance.

While defining the solution/s and describing it through the project proposal the CSO should pay attention to the description of the situation by considering the readers perspective and their need for clear and concise information. The background information of the situations should be supported with real and official data and facts whenever available, while vague assumptions should be avoided. The same approach should be applied while defining the proposed activities to address the specific gap/s or need/s, which should also be clear in terms of their duration, location, number or involved partners and participants, means of verification, and expected results for each of the activity.

The CSO shall be comfortable in presenting all the required detailed information for the targeted group/s for the overall project and/or for each individual activity. Most importantly the CSO shall present the aimed change or improvement they are aiming to achieve with their proposed action/s for respective challenges and processes. Defining the activities, the objective/s of the intervention, the expected results, and the characteristics of their targeted group/s, the CSO will be able to define the indicators and methods or tools to follow and monitor the completion and the achievement of expected impact of the project.

■ Definition of this elements enables easier elaboration of the Logical Framework of the proposed project and structuring of the chronology of the activities planned into a clear Plan of Activities.

Another important aspect to be considered while designing a proposal is the planning of the communication strategy and presenting what will be the actions and tools that will enable

and increase the visibility of the project activities and will effectively disseminate its objectives, activities and results and reach the targeted audience.

To enable the implementation of the planned activities the CSO should also assess the required human resources to be engaged, the approximate cost of the required service/s and/or products to be engaged/contracted/procured. The cost shall be based on preliminary market research among the providers of similar services/products. The CSO should also plan based on their financial management capacity considering the scale of their previously implemented projects and the experience of the planned management staff. It is important for the CSO to follow the criteria and the instructions of the call on the limits of the accepted share of budget for administrative expenses, purchase of equipment and project activities. Additionally, it is crucial to review the Frequently Asked Questions (FAQ) section during the project preparation phase, as it often contains answers to many commonly asked questions.

- Be informed with updates on the developments at your community, municipality and beyond.
- Describe clearly the problem, you aim to address, propose well-defined activities and specify the required resources.
- Make sure to use the required templates of the public call for CSOs without mixing them.

1.3 Application Procedure

The application package for each call includes a set of mandatory templates to be completed, a set of supportive required documents and the guidelines for application.

When preparing the documents and prior to the submission of the application, the CSO should carefully read the guidelines and check the list of required documents to ensure administrative compliance with the call requirements and avoid potential disqualifications at the technical level.

- Read and respect the Guidelines for each public call for CSOs.
- Respect the Checklist of the required mandatory and supportive documents and respect the application deadline.
- Attend all training sessions and practical workshops organized by the donor or municipality related to the public call for CSOs.

2. Implementation

Upon the closure of the public call/s, the evaluation process takes 2-4 weeks, while the time between the official notification that the project was positively evaluated and will be supported and the official signature of the grant contract/agreement usually takes additional 2-4 weeks. This shall be considered by the CSOs while planning their interventions and activities under specific proposed projects to ensure proper planning in line with the circumstances in the field and to avoid potential challenges during the implementation afterwards.

The signing of the grant contract/agreement marks the official launching of the project and the possibility to initiate the implementation of the preparatory works, activities, and expenditures.

- Don't forget the time needed for the evaluation and the official contract signing when planning the activities and the project.
- Consult the calendar of the official holidays and official important dates/ events.
- Don't start the implementation of the activities or expenditures prior to the official signing of the contract/agreement regardless that you were officially informed on the positive results.
- Participate in information sessions to clarify implementation procedures.
- Consider email correspondence as the main communication tool for the approvals and other project related issues.

2.1 Procurement

The implementation of the project starts with the preparation of the activity plan and the procurement plan, which provides the opportunity to identify and define the need for procurement of the required services, purchase of specific products and/or engagement of required human resources needed for the implementation of the project activities.

The CSO shall be informed and comply with the required procedures for specific services, ensure to demand the accurate documents from the potential applying and bidding service providers. To ensure transparent and competitive process, the CSO should publish the calls for offers/proposals and disseminate the information among as many stakeholders/potential bidders in the market as possible.

For each step of the planning, implementation, and procurement procedures, under each call, the specific package of defined templates should be applied. For example, the activity plans, the procurement plan, the call for offers/proposals, the minutes from the evaluation of offers, the contracts, reporting templates etc. are some of the main templates provided to the CSO upon the signing of the grant/contract agreement and shall be used by the CSO especially in case the CSO doesn't not apply its own similar templates for such cases.

For contracting a service and/or product provider, which is budgeted above EUR 250.00, the CSO must run an open call for offer and ensure the collection of at least three responsible offers, which should be evaluated by a three members' commission. While for engagement of services and purchase of products, which are budgeted below EUR 250.00, the CSO can implement a direct contracting procedure and ensure proper justification.

Under each budget line, the CSO shall organize chronological order of documents such as the 1. call for offers, 2. potential written communication with the bidders, 3. offers/proposals received with all the supporting documents for the bidder/s, 4. evaluation minutes completed with the required information and signed by the evaluation commission members, 5. the contract with the selected service/products provider, 6. their report on the service provided, 7. monthly timesheets for the staff and consultants engaged, 7. the bill for the service-s/product-s provided, 7. other supporting documents and data if applicable, 8. the proof of payment with the required information etc.

2.2 Documentation: Hard Copy vs Online

When organizing all the supporting documents corresponding with the budget lines, the CSO should keep the record of these documents in original hard copies organized into three folders: 1. Administrative documents (with the procurement documents) 2. Financial documents (bills and proof of payments), 3. Visibility documents/materials (posts, promotion materials, and products).

■ In parallel, develop a structured digital archive in shared folders to complement the physical records. Coordinate with the donor team to ensure the format aligns with their expectations. This setup facilitates real-time feedback and ensures smooth communication, allowing you to address comments and improve documentation quickly.

Use the organized and secure online platform to maintain the archive for long-term access. This approach simplifies future evaluations, monitoring, and reporting. Ensure the files are consistently named and well-categorized to support efficient navigation and use by all stakeholders.

- Develop Comprehensive Plans (Activity Plans, Procurement Plan, Visibility Plan).
- Ensure Transparency and Fairness throughout the entire process (including calls for offers, calls for expression of interest, contracting services etc.)
- Use a Three-Folder System for Hard Copies: Administrative Documents, Financial Documents, Visibility Documents.
- Create a Shared and accessible Online Archive.

2.3 Impact assessment and measure

The definition of the expected results for each proposed objective, indicating the number of participants, beneficiaries, and stakeholders in comparison with the respective baselines helps the CSO to follow up easier on the completion of each activity and to ensure the intended impact is being measured. In addition to this, having a clear picture on the verification measures and tools and their implementation through the project implementation enables continues collection of feedback from the involved parties, and at the same time facilities the addressing of any potential challenge that may rise during the implementation and adjust the implementation plan and activities to the new circumstances. Any potential change in terms of activity time and structure should be communicated by the CSO to the donor organization and/or institution.

Together with the follow up and the measure of activities success the overall impact assessment can be measured with the accomplishment of the outputs and the involvement and feedback from the stakeholders.

- Define the project expected results, outputs, number of participants, beneficiaries and involved stakeholders.
- Implement the means of verification for each activity.

2.4 Reporting

Depending on the project implementation timeframe and the requirements outlined in the respective calls and by the donors, the CSO should submit regular reports, including narrative and financial progress reports, as well as interim and final reports. These reports must adhere to the required fields in the specified reporting templates and provide detailed information about the implementation process, including challenges encountered and the mitigation measures taken by the CSO.

If the donor provides comments or requests additional information or clarifications, the CSO should address these promptly and thoroughly.

Each report should include the necessary supporting documents, covering both the implementation of activities and the administrative/financial processes. This ensures transparency and facilitates comprehensive assessment by the donor organization.

- Submit reports regularly to ensure timely updates on project progress.
- Provide comprehensive details in your reports, keeping in mind that the reader may not be as familiar with the process as you are.

2.5 Monitoring and guidance

Regular monitoring and follow-up of activities, along with measuring the impact by the CSO, are essential to ensure the smooth implementation of the project and to effectively address any potential challenges that may arise due to various circumstances or factors. While defining the means of verification for the completion of each activity and the project, the CSO should also establish an internal monitoring schedule and specify the tools to be used.

Additionally, the CSO must follow to the monitoring requirements set by the donor organization or institution. Specifically, it should acknowledge the donor's right to visit the organization and project sites, request clarifications, and access relevant supporting documents at any time. In response to ad hoc monitoring meetings or visits, the CSO should cooperate fully, as well as during interim and regular monitoring meetings, by adhering to proposed schedules and addressing any recommendations related to completing the project implementation dossiers.

The CSO should feel confident in reaching out to the donor organization/institution for any project-related issues, including seeking clarification on specific processes or obtaining approval for potential changes and modifications. Simultaneously, the CSO should ensure regular communication with all stakeholders involved, utilizing email, specific platforms, and shared folders, as agreed upon with the donor organization or institution.

- Monitor the implementation of your activities, procurement processes, and financial management to ensure transparency and efficiency.
- Don't hesitate to contact and consult with the donor organization or institution regarding any project-related issues.
- Respond promptly to the monitoring schedules and requirements set by the donor organization or institution.
- Invite donor and municipality/institutions in organization of events.

3. Visibility and communication

Throughout the implementation of project activities, the CSO should incorporate communication and visibility measures to ensure the transparent dissemination of information about activities and results, effectively reaching targeted audiences. The CSO must adhere to the applicable legal framework regulating the photographing or filming of individuals, events, and locations. Whenever it is safe and appropriate, informed consent should be sought from those being photographed or filmed.

Information on implemented activities should be shared on the CSO's website and social media platforms. This includes details such as the name of the partner/beneficiary project, a brief project description, objectives and expected outcomes, the implementation period (start and end dates), and the contact person for further information.

Additionally, the CSO should always acknowledge the support provided for the project and use relevant disclaimers, hashtags and tags appropriately to increase visibility.

Possible activities to enhance project visibility include:
- Field activities and events involving direct interaction with beneficiaries.
- Trainings, workshops, coordination meetings, and other similar events.
- Human-interest stories or testimonies.
- Engaging quotes from partner CSOs, community leaders, or professionals.
- Highlights of project achievements, publications, reports, or studies of public interest.
- Awareness campaigns, among others.

Before publishing any visibility materials or products, the implementing CSO should consult with the donor organization or institution. To avoid delays in publication and ensure materials remain timely and relevant, the CSO should plan and communicate effectively with the donor organization or institution's team.

- Develop and implement a comprehensive communication and visibility plan to ensure effective dissemination of project information.
- Count on the time needed to get promotional and visibility content approved and maintain regular communication with the donor organization/institution's responsible team.

3.1 Visibility and communication strategy

Communication with the public within regarding any activity or project implemented, is based on the Communication and Visibility Plan, which is developed to serve as a framework for stakeholders involved in implementation. The plan identifies the overall communication objectives, target groups, the role of individuals involved in the communication and visibility plan for each activity, the necessary resources, the monitoring and evaluation framework, and the ethical standards to be upheld during the process of implementation.

The communication and visibility plan is shared carefully with CSOs prior to the beginning of implementation activities.

In communicating information to the public, CSOs are obliged to increase the visibility of the donor, in the case of ReLOaD of the EU-UNDP partnership and its contribution to meeting people's needs through support for transparent fund distribution and raising awareness of the European Union as the primary donor.

3.2. Success stories

Success stories are essential for showing the impact of CSOs on individuals and communities. They serve to stress the positive changes in people's lives and demonstrate how initiatives and the support given lead to transformations.

Success stories encourage deeper engagement by sharing relatable human experiences that resonate with audiences.

CSOs should proactively provide relevant materials to their donor organization instruction's responsible team, facilitating the creation of success stories, including offering contact information, and coordinating logistics for meetings- ensuring that the necessary resources are available.

When the donor institution expresses interest in developing material, CSOs should support the process by streamlining communication and access.

CSOs should aim to create content that is impactful and memorable.

- Consider providing material to publish on the donor institution responsible team websites/pages.
- Aim to provide narratives that relate the most to audience.

3.3. Social media

Information about the implemented activities is disseminated on the existing CSOs' websites and social media.

CSOs are recommended to have a social media page and aim to share every activity. The creation of a website or social media profile in the name of the project or donor organization/institution is not permitted.

In case the CSO wants to create a web page/platform for their supported project on their website, it should be consulted with the responsible team first.

During the implementation of EU-funded activities, the websites must feature the logo of the donor/project partners and a link leading to more information about the ReLOaD2 project if it is the case, however, all of this should get an approval from the responsible team to proceed.

Every post on any social media platform should include the respective disclaimer provided by the project or the supporting organization/institution. For the case of ReLOaD the following note is included at the end:

This project/activity/campaign…(or other) is supported by the Regional Programme on Local Democracy in the Western Balkans 2 (ReLOaD2), funded by the European Union (EU) and implemented by the United Nations Development Programme (UNDP).

Other donor funded projects, have different disclaimers to be used.

> ■   It's important to remember that communication and visibility guidelines can vary for different social media materials. Therefore, the CSOs should always reach out to the responsible team for assistance. The CSO must follow the team's recommendations to ensure compliance and effectiveness.

When writing a social media post:

- Provide a clear theme and purpose – Who are we addressing? What do we want to achieve? Are we directing the audience to a website? Inviting people to share the post with others? Starting a discussion? Raising awareness? Inviting participation in an event? Informing about an event?

- Encourage audience engagement.

- Accompany the post with a high-quality photo, video, link, or other multimedia to make the post stand out.

- Be brief, current, and use persuasive and concise language.