Partnerships for Forests | Catalysing investments in forests and sustainable land use

P4F Dashboard Guidance for Project Partners

SYSTEMIQ

Palladium MAKE IT POSSIBLE

McKinsey&Company

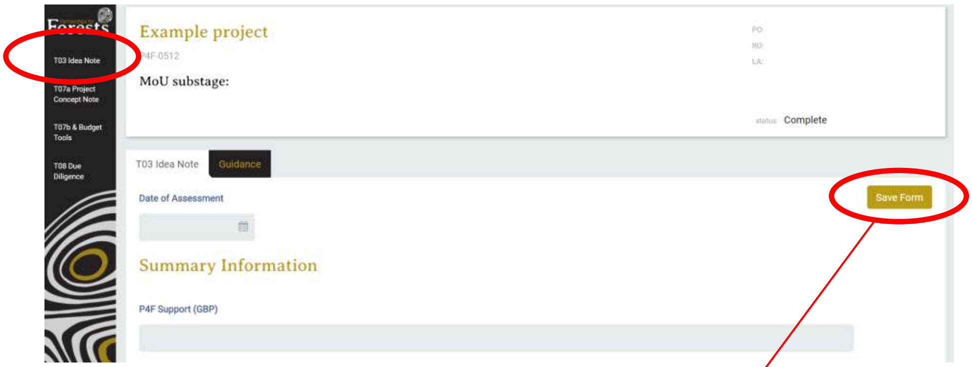
Delivered by Palladium in partnership with McKinsey&Company

Contents

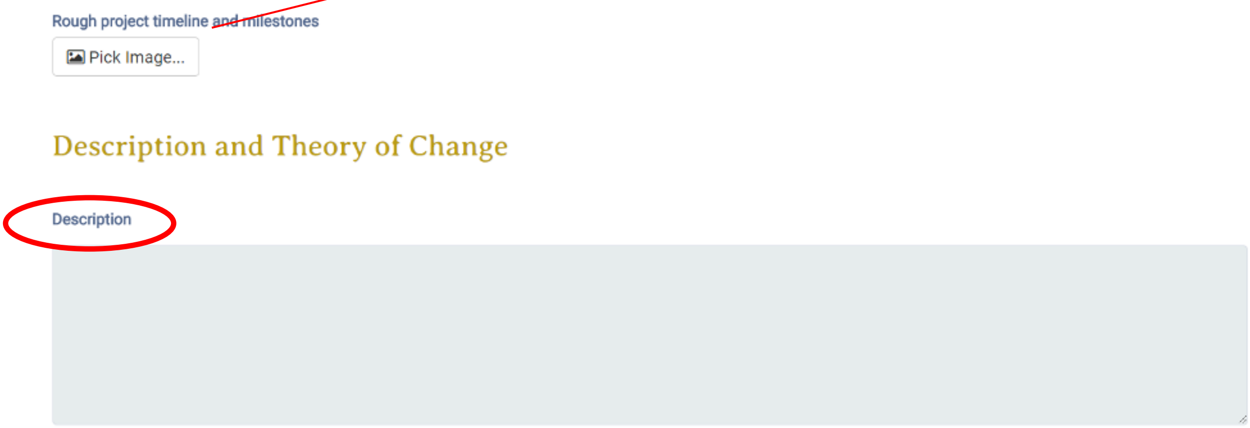
1. Idea development guidance

1.1. How to complete a T03 idea note

Step 1 – Using the external link shared by your project officer, select idea note from the left hand pane.



Step 2 – Complete the text boxes in the form. You can save the form and exit at any time. Simply reopen the form to make further edits. Make sure that only one person is editing the form at a given time. For the milestones section please create a workplan as an image and upload. Make sure you provide evidence for each of the evaluation criteria.

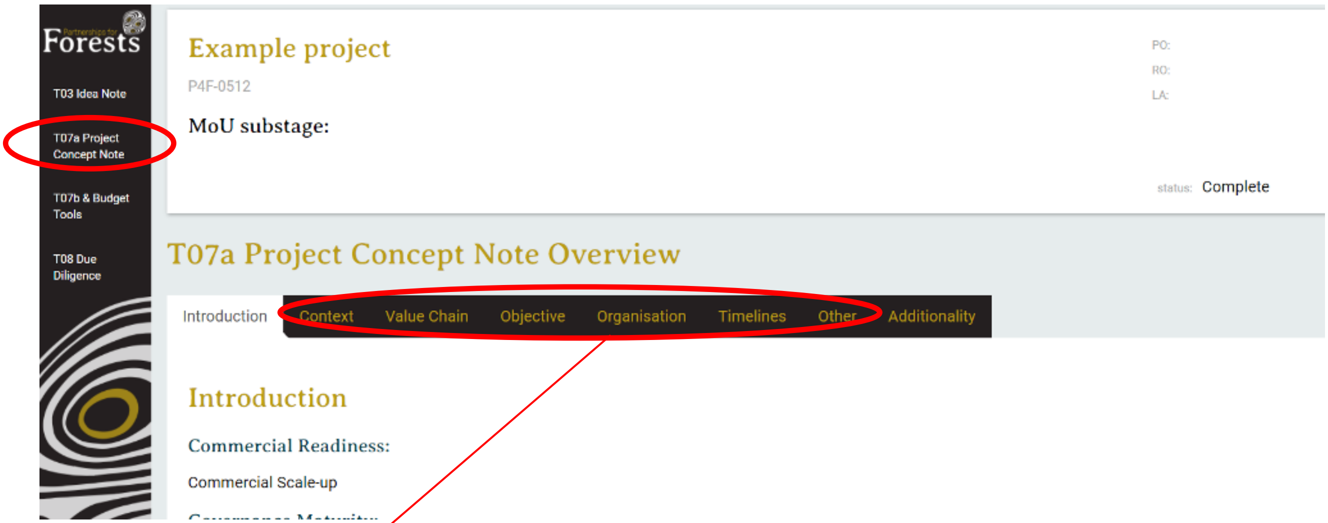


Filling out the form

- P4F Support – Enter grant request amount in £
- P4F Support by 2020 – Enter full grant amount requested including future phases (if applicable)
- Project timeline – Include an image of phases and associated milestones if known
- Description – Provide a short description of the proposed project
- Theory of Change – What is the problem the project is trying to solve and how will it achieve this?
- Commodities – Select commodity from dropdown
- Assessment criteria – Select from the dropdown list for each criteria. Provide evidence to endorse your assessment in the free text box below
- Additionality criteria – Select yes/no for criteria and provide a reason for your answer in the box below
- Conclusion – Provide an overall summary of the project and its strengths and relevance to P4F

1.2. How to complete a T07a project concept note

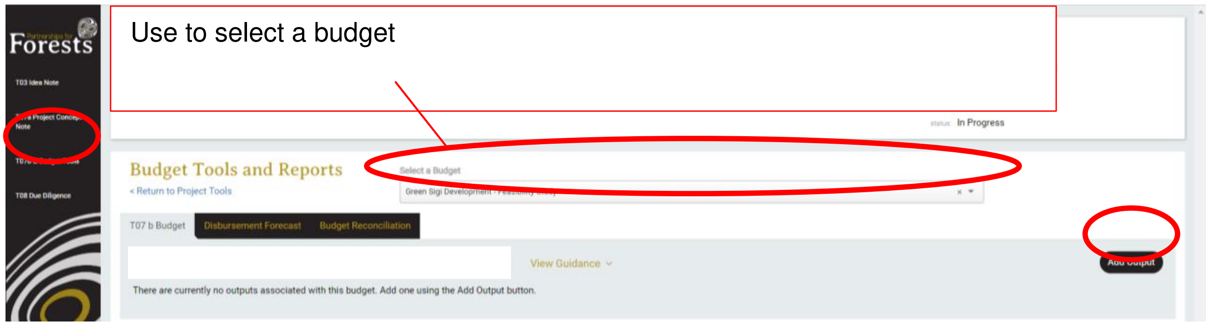
Step 1 - Using the external link shared by your project officer, select T07a Project Concept Note from the left hand pane.



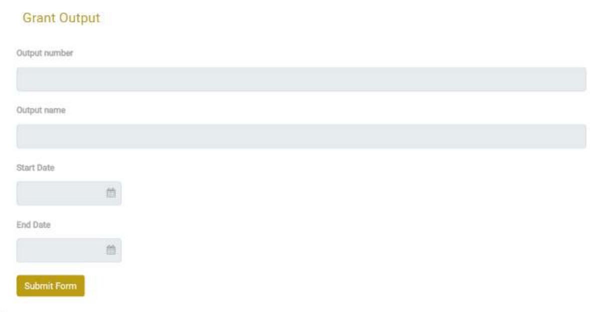
Step 2 – Edit the selected tabs providing the information required. Guidance as to what each section should contain is embedded in the form itself. The introduction and additionality tab are not editable but all other sections. You can input rich text including bullet points and text emphasis. You can also upload pictures.

1.3. How to add the T07b to the P4F Dashboard

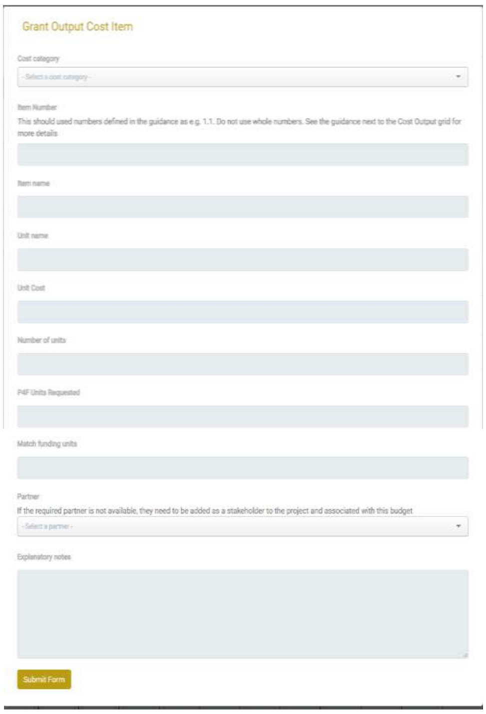
Step 1 - Follow the link provided by the project officer to the project page on the dashboard and then select the T07b section from the menu at the side of the page.



Step 2 – Select the relevant budget using the "Select a Budget" menu and then add an output using the "Add Output" function and fill out the form.



Step 3 – Cost items can now be added for the output, to do this click on the "Add Cost Item" button and fill out the form according to the guidance set out below.



Filling in this form

Cost category – Select the category from the dropdown menu.
Item Number – Follow the guidance set out in this table:

1.1 Permanent Staff
1.2 Temporary Staff (inc.consultants)
2.1 International Flights
2.2 Domestic Flights
2.3 Ground Transportation (Trains, Ferries, Taxi etc)
2.4 Overseas Subsistence (Accommodation, Meals etc. while working in different country)
2.5 Domestic Subsistence (Accommodation, Meals etc. while working in same country, but away from home city)
3.1 Vehicle rental
3.2 Vehicle costs (fuel, maintenance, repairs, etc.)
3.3 Office rental and other rental charges
3.4 Consumables - Office supplies
3.5 Other services (Telephone, Internet, Banking Costs etc.)
4.1 Workshop 1 Costs
4.2 Workshop 2 Costs
4.3 Workshop 3 Costs
5.1 Communications Strategy
5.2 Communications Product
5.3 Communications Event
5.4 Other Comms Costs
6.1 / 6.2 etc. Other - this is used for Legal Fees, other eligible expenses, and where P4F TA should be noted.

Item Name – The name of the individual cost item
Unit Name – the unit by which the cost is charged, e.g. FTE, days, km etc
Unit Cost – Cost per unit in GBP
Number of Units – the total number of units required
P4F Units – The total number of units to be charged to P4F, do not use percentages
Match Funded Units – The total number of match funded units
Partner – Select the relevant partner/stakeholder for the item
Explanatory Notes – Additional item information and description.

Other things to consider:

1- The description of the items must be adequately detailed and must show each of their main components.
2- The number of units and the unit rate must be specified for each component according to the indications provided.
3- The applicants are encouraged to provide a match funding of at least 25 percent of the total project costs. The contributions could be in-kind or matched cash contributions include the use of vehicles, fuel, infrastructures, office services, staff time of the organization or other resources, and must be shown in monetary value. In the case of multiple sources of funding please identify by source in the explanatory notes (column H). Please refer to the guidelines for using grant funding for more information.
4- If the staff are not employed full-time in the activity, the percentage must be indicated next to the description of the position, and reflected in the unit number.
5- Indicate the applicable rates. The costs covering lodging and meals, transportation costs within the mission site of the mission and out-of-pocket expenses. The subsistence allowance rates must be

reasonable and in line with the national average with respect to the activities planned for by the project.

6- List and detail all operational expenses planned throughout the project.

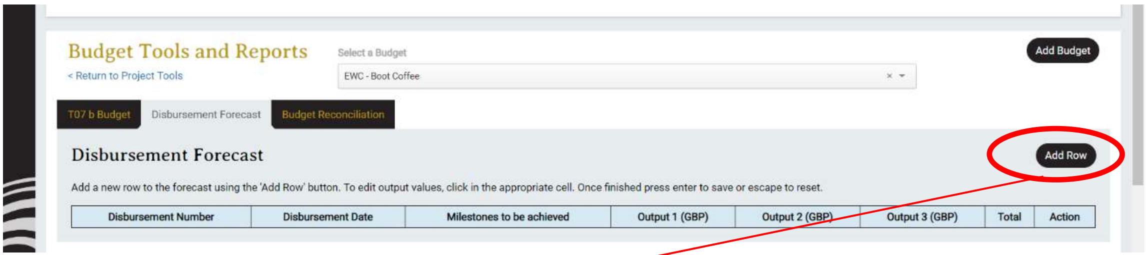
7- Enumerate and provide a detailed budget for each meeting, workshop and training that will be organized during the project. This budget should specify the number of participates, the number of days, the facilitation costs per day, the per diem rates used, the hall rental costs, the costs of lodging and meals, as well as any other cost associated with the event.

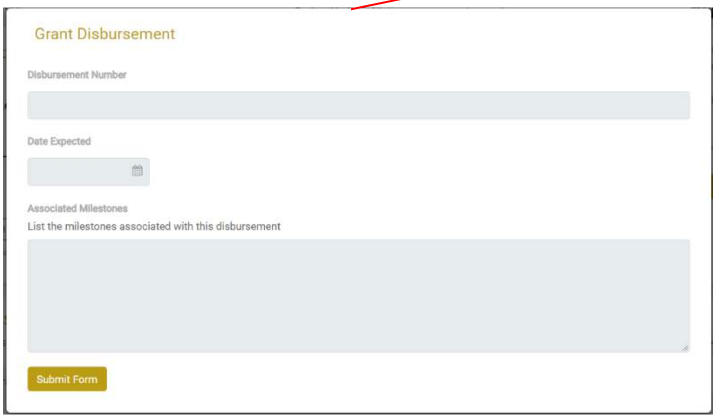
8- All expenses incurred for developing and implementing communications and knowledge management activities. Items under strategy development could include consultancy fees, or fees to engage media or branding agencies. Items under products could include case studies and reports, flyers, posters, newsletters, websites and other outputs. Items under events could include launch events, stakeholder consultations or media briefings. Applicants are advised that digital, low-cost, communications should be used wherever possible.

2. Guidance on raising a disbursement request

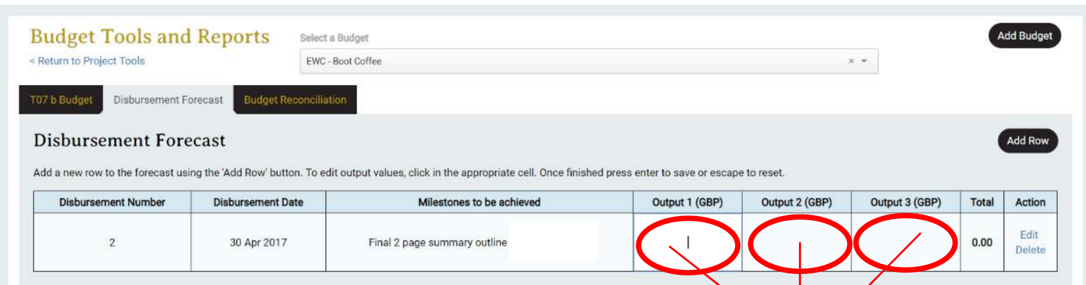
2.1. How to add disbursement forecasts

Disbursement forecasts can be added or edited from the “disbursement forecast” section of the T07b page. To add a disbursement click the “Add Row” which will open a form to be filled out.





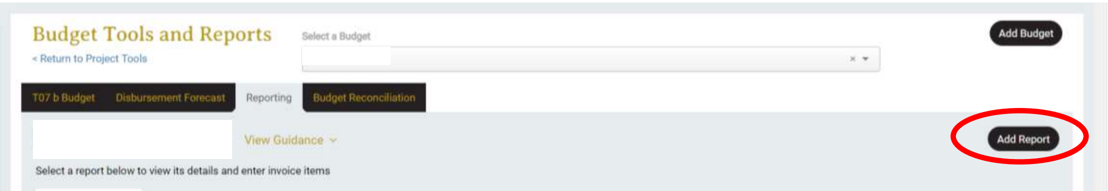
Once this form has been filled out the disbursement will be added to the page and the disbursement values can be typed in directly to the row. The total value will automatically be calculated by summing the outputs.

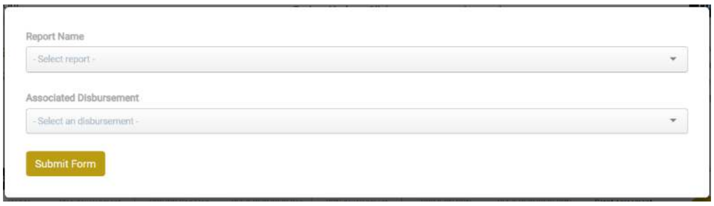


Enter the disbursement amounts into here. Please note only enter the numbers of the value, if there are any symbols, including commas or spaces then the dashboard will not accept the number.

2.2. How to add financial reports to the P4F dashboard

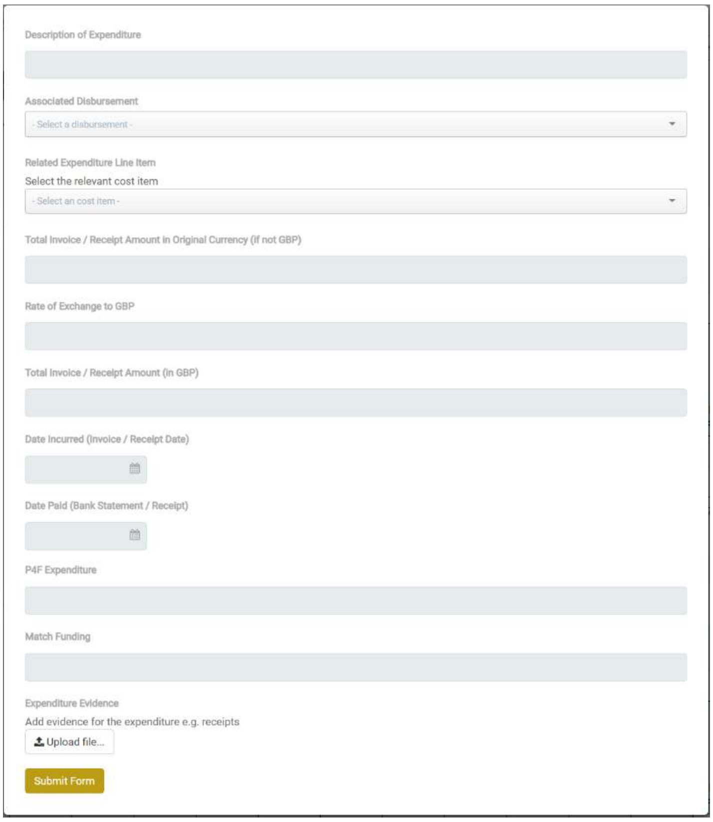
<u>Step 1</u> - To add a financial report for a project go to the “Reporting” section of the T07b page and click the “Add Report”.





This form will open, the report name must be selected from the drop down menu. If you are reporting and not requesting payment then you do not need to add an associated disbursement. If you are requesting payment, then you must associate it to a disbursement.

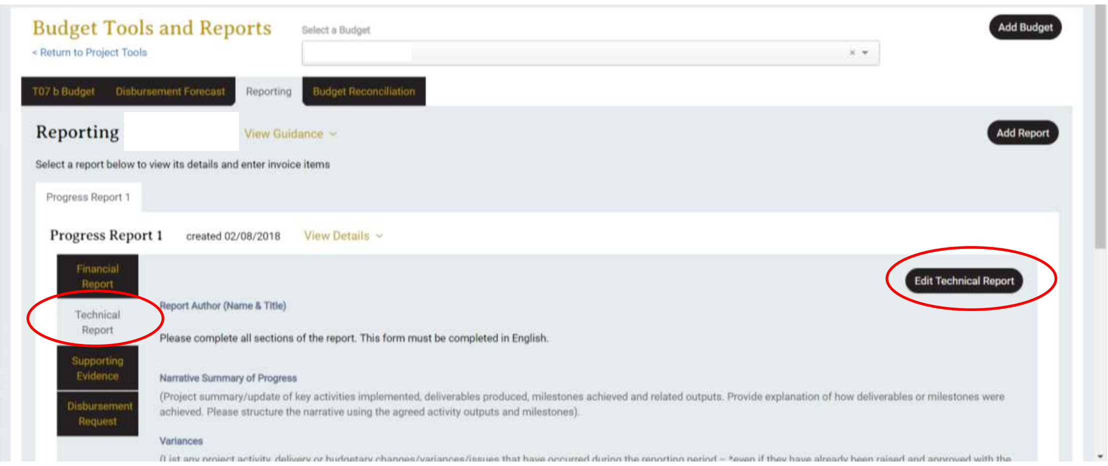
<u>Step 2</u> – Click the “Add Invoice” button and fill in the form for each of the invoice items in the report.



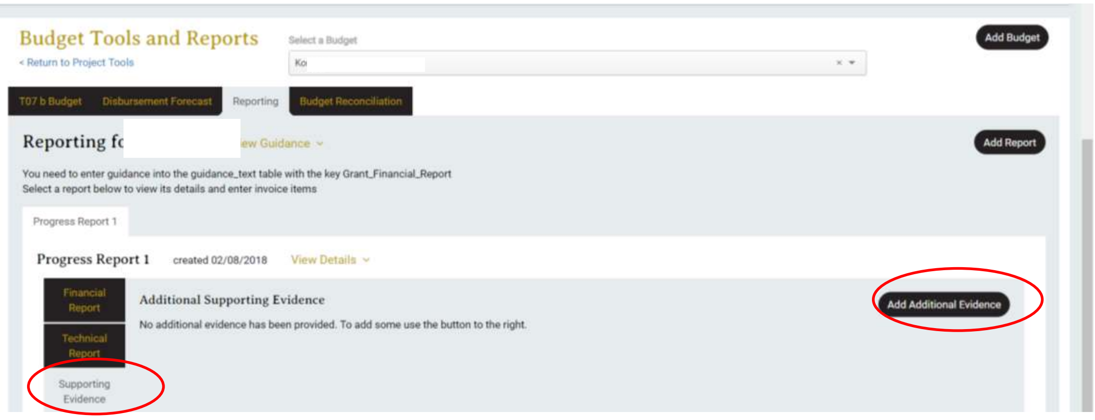
How to use this form:
Description of expenditure – Add a simple description of the expense
Associated Disbursement – Select number
Related Expenditure Line Item - Use the dropdown menu to find the specific cost item that the invoice is for, the cost item must be in the original budget.
Total Invoice (not in GBP) – The invoice amount if the original currency was not GBP
Rate of Exchange – What the exchange rate was at the time of purchase.
Total invoice (in GBP) – The invoice amount.
Date incurred – The date at which the cost occurred
Date Paid – When the cost was paid
P4F expenditure – Cost to P4F
Match Funding – Amount match funded

Expenditure Evidence – For each expenditure please attach a piece of evidence, for example, a receipt

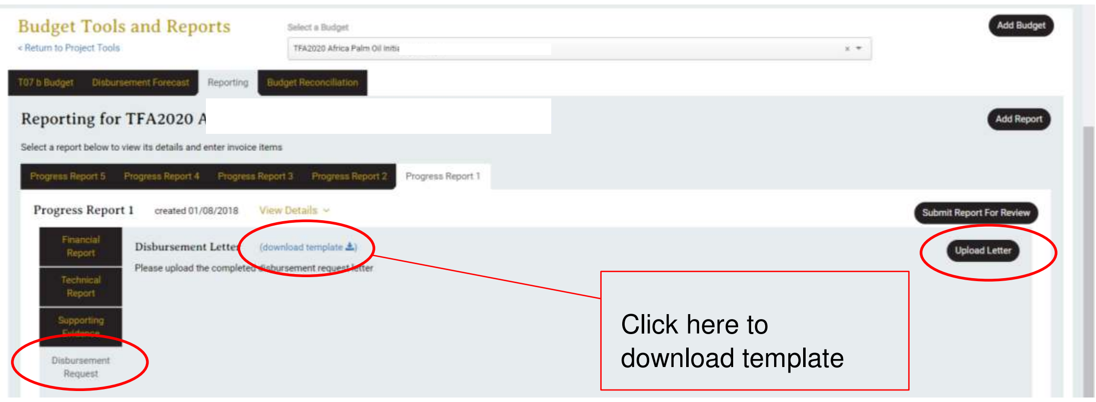
Step 3 – Navigate to the “Technical Report” section and click “Edit Technical Report”, this will open another form. Fill out the form according to the on-screen guidance.



Step 4 – Any evidence that shows or supports the completion cost items, e.g. meeting minutes, should now be inputted. This can be done by Navigating to the “Supporting Evidence” section and clicking “Add Additional Evidence”, fill out the form and upload the supporting evidence. You must not add line item expenditure evidence (for example receipts) to this section.



Step 5 – The disbursement request letter should now be uploaded, a template for which can be found in the “Disbursement Request”. Once the letter has been filled out it can be uploaded in the same section.



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Step 6 – Once all of the step have been completed the report can be submitted for review, simply click the "Submit Report For Review" button which can be found on all of the reporting pages. **Please also email the project officer to ensure they are notified.**

3. P4F Dashboard Support

For guidance on using the P4F Dashboard please contact your project officer.

For troubleshooting, technical support, requests for in-depth training or queries please ask your project officer to put you in contact with the Central Dashboard Team.