AIDOS
PROJECT MANAGEMENT HANDBOOK

(15th of September, 2021)

AIDOS PROJECT MANAGEMENT HANDBOOK

Contents

Addendum: is an attachment to a contract that modifies the terms and conditions of the original contract

Amendment: is a change or addition to the terms of a contract, law, government regulatory filing, or other document.

Applicant/Leading Organization: The Organization that is financially responsible to the Donor/Contracting Authority, for itself and/or on behalf of a Consortium.

Cash Flow: Estimation of the future Cash Flow resulting directly from a project's implementation.

Consortium: A group of NGOs/companies/institutions that have partnered to undertake a project.

Contract: A signed agreement binding different parties to carry out a specific service. A contract includes a *General Conditions* section as well as all related attachments and documents.

Contracting Authority/Donor/Funding Agency: Is the government of a beneficiary country or a legal person governed by public or private law, **providing funds and/or grants,** concluding the contract and controlling the budget.

Experts/Consultants: Persons who provide expert advice and/or service professionally. Due to their highly specialized competence, they contribute in carrying out specific project activities. The duration of their assignment can be short-term (till 6 months) or long-term based (more than 6 months).

Project: A series of services that have to be provided under a given contract.

Subcontractors: The Grant Applicant has the possibility to conclude contracts with subcontractors. Subcontractors are neither partners nor associates and are subject to the procurement rules outlined in Annex IV of the Standard Grant Contract.

Terms of reference: Documents produced by the Contracting Authority providing information about requirements, objectives, results and specifying the methods and resources to be used to achieve expected result.

1   Purpose of the Handbook

The objective of this handbook is to provide AIDOS and partners' staff with a set of tools that help identify the main steps necessary for the preparation, management, monitoring and evaluation of projects, at local and international levels.

Most explanations and examples contained in this handbook are valid for all kinds of projects, independently of Donors/Contracting Authorities.

2   Overview of Project Cycle Management

During the **Programming** phase, the situation at national and sectoral level is analysed to identify problems, constraints and opportunities, which AIDOS interventions could address. This can involve a review of socio-economic indicators, and of national and donor priorities. The purpose is to identify and agree the main objectives and sectoral priorities for AIDOS interventions, and thus to provide a relevant and feasible programming framework within which projects can be identified and prepared. For each of these priorities, strategies will be formulated that take account of the lessons of past experience.

During the **Identification** phase, ideas for projects and other actions are identified and screened for further study. This involves consultation with the intended beneficiaries of an action, an analysis of the problems they face, and the identification of options to address these problems. A decision can then be made on the relevance of a project idea (both to the intended beneficiaries and to the programming framework), and on which ideas should be further studied during the Formulation phase.

During the **Formulation** phase, relevant project ideas are developed into operational project plans. Beneficiaries and other stakeholders participate in the detailed specification of the project idea that is then assessed for its feasibility (whether it is likely to succeed) and sustainability (whether it is likely to generate long- term benefits for the beneficiaries). On the basis of this assessment, a decision is made on whether to draw up a formal project proposal and seek funding for the project.

During the **Financing** phase, project proposals are examined by the funding agency, and a decision is taken on whether to fund the project. The funding agency and AIDOS agree the modalities of implementation and formalise these in a legal document, which sets out the arrangements by which the project will be funded and implemented. AIDOS in its turn will sign an agreement with partners involved.

During the **Implementation** phase, the project is mobilised and executed and in consultation with beneficiaries and stakeholders, project management assesses actual progress against planned progress to determine whether the project is on track towards achieving its objectives. If necessary, the project is re-oriented to bring it back on track, or to modify some of its objectives in the light of any significant changes that may have occurred since its formulation.

During the **Evaluation** phase, internal/external consultants assess the project to identify what has been achieved, and to identify lessons that have been learned. Evaluation findings are used to improve the design of future projects or programmes. Although in the generic cycle the evaluation phase comes after implementation, it is common practice also to conduct a mid-term evaluation during implementation, to identify lessons that can be applied during the remaining life of the project.

2.1 Main phases of project design

This chapter describes the different phases and aspects of design and implementation: stakeholder consultations; targeting and baseline survey; development of partnership with the local implementing partners.

2.1.1 Consultations with the local stakeholders

Prior to the design phase of a project or programme with potential social and economic impact at the local level, appropriate consultations with the relevant stakeholders can provide an opportunity to strengthen the understanding of the intervention, to build consensus and ownership among those likely to be affected, to learn how the different parties view the intervention and to better gauge its challenges and possible mitigation measures. Listening to stakeholders' concerns and feedback is a valuable source of information that can improve project design and outcomes. It helps AIDOS to identify and control external and internal risks. Consultations can also form the basis for subsequent collaboration and partnerships. For the stakeholders, a consultation process is an opportunity to share information about the local context in which a project will take place, to raise issues and concerns, ask questions, and potentially help shape the project by making suggestions for the relevant institution(s) to consider and respond to.

Relevant stakeholders may include organisations providing training and/or managing business/education/health services, local and international development organisations, civil society and community-based organisations, women's associations, research institutes, universities and private sector organisations, entrepreneurship development programmes, health programmes, sponsors and government agencies, women's cooperatives and potential beneficiaries, vocational centres, credit schemes, MFIs, banks and other financial institutions, policy makers, diplomatic missions and donor agencies (e.g. bilateral donors, EU, UN) and representatives of the local community (both men and women).

Depending on the nature and scale of a project, the presence of a new organisation in a community has the potential to affect many different aspects of people's lives. Keeping in mind the different roles of men and women, consulting primarily with men provides only partial information, while engaging women in the consultation process usually requires a good awareness of local gender dynamics and concerted effort. Consultation approaches can contribute to women's empowerment by ensuring that women's views, as distinct from men's, are taken into due account and by building the capacity of women's groups and other organisations active in the promotion of gender equity. Good practice encourages seeking out the views of women, as this provides AIDOS and its partners in the field with a more complete picture of potential risks and impacts, e.g. unintended effects such as increased domestic violence or exacerbation of existing inequalities between men and women. Taking women's views into consideration can help to better understand, predict, and mitigate negative externalities, thereby enhancing a project's social performance.

Women, however, are not a homogenous group: not all of them will necessarily have the same interests or priorities. When involving women in consultations, it is thus important to ensure the representation of different perspectives across socio-economic, class, caste, ethnic and religious lines. Marital status and age can also be

significant factors. It may be useful to also consult NGOs and community-based organisations that represent women from minority groups [1].

Consultations can be conducted through one-to-one or community meetings, focus groups, workshops and surveys.

2.1.2 Targeting and Baseline survey

At the beginning of a project AIDOS might conduct a baseline survey to obtain a snapshot of the standard of living in a community or target population at a given moment.

In the case of incubator interventions, the baseline study is carried out to assess the existing situation in the country with regard to the entrepreneurship needs of the target population, existing facilities, accessibility and local demand, with a special focus on the BDS designed for and available to women. Local research organisations are contracted to conduct the baseline study, with the technical assistance or back-stopping of international consultants, when needed.

The baseline aims: (a) to detect behavioural patterns in a population, to measure the usage levels for certain services, and to collect demographic information; (b) to determine current indicator levels before intervention, to reconfirm the programme objectives and to provide a benchmark against which to evaluate their progress/accomplishment at a later stage; (c) to establish the project targets or to provide base values for the chosen indicators; (d) to draw conclusions that can be applied generally to the whole population of an intervention area.

The components of a baseline study usually include:

- rationale and objectives, including a clear presentation of the issues surrounding the research and its aims, as well as specific questions that the survey is meant to answer;
- description of the research location and geographical context, including the criteria used for selecting the location as well as gathering general information on the target population (characteristics of the community, access to basic public services, economic situation, etc.);
- survey methodology (with approved questionnaire and other research tools).
- results providing detailed responses to the research questions set out in the introduction;
- conclusions and recommendations.

The baseline survey contributes to the correct and coherent targeting of the beneficiaries in the project area. Appropriate targeting is a key challenge for any intervention, together with effective and timely mobilisation of prospective users/beneficiaries.

2.1.3 Developing a partnership with the local implementing partners

AIDOS approach to development cooperation is grounded on the belief that sustainability and effectiveness can be achieved only through a substantial and responsible involvement of local organisations throughout all phases of the project

---

[1] Adapted from "Guidelines on Stakeholder Engagement" in REDD+ Readiness, April 20, 2012.

cycle. Therefore, AIDOS does not implement field projects directly, but shares the responsibility of project implementation with local partner organisations in order to guarantee the project's social and cultural sustainability and its continuation once AIDOS support comes to an end. AIDOS provides short-term advisory assistance throughout the project duration by sourcing and coordinating on-site technical advice and assistance by international experts during the most critical phases of the project (e.g. design, team induction and capacity building, development of training/information materials and other tools, regular reviews of performance, defining sustainability strategies and - where relevant - organisational business plans). AIDOS also provides long-term field-based support through international coordinators whose role is to liaise closely with the implementing organisation, to facilitate the timely and effective implementation of the project and to provide relevant capacity building at institutional and managerial levels.

AIDOS project managers/coordinators and consultant experts may work at the partners' premises, in remote and/or with a mixed approach, i.e. on site and in remote at the same time. and operate closely with the local teams. The local NGOs are full implementation partners and contribute to the project in terms of human resources, assets (when available), knowledge, institutional networks and previous experience in the field.

AIDOS projects are designed and implemented as model initiatives that can be replicated in other areas of the same country and, with the due adaptations, in other countries and/or on a larger scale. The local NGO staff trained in the methodology of one intervention can train staff of similar projects in the same or neighbouring country (for instance in the case of the incubators in Jordan and in Syria, the two incubators shared know-how through exchanges and study tours).

Through the implementation of demonstrative projects, AIDOS promotes the creation of new local organisations or the strengthening of existing ones to respond to local development needs and challenges in an effective and sustainable manner. Such organisations actively participate in the institutional dialogue in their country and - to the extent possible - they influence policies and strategies on a larger scale.

AIDOS also implements projects in Italy and in Europe, often forming a consortium with other organisations which share the same vision and have either a complementary expertise or a similar expertise in a different EU member state or other geographical areas.

The identification of a suitable partner is therefore crucial. A preliminary assessment of the partner takes place during the early phase of project design. The design phase usually relies on the participation of the key stakeholders in the sector of intervention, which might already highlight the most suitable candidates for cooperation on a specific project. In addition to the technical capacity of the partner in carrying out projects (which should be evidenced by the partner'   's project track record in this field), it is crucial to test the partner's adherence with AIDOS Ethical code and policies, its level of interest in the initiative and capacity to implement a project with a gender perspective. This can be done through a gender assessment, which also allows to address any weakness through *ad hoc* capacity building activities.

A *gender assessment* enhances the collective capacity of an organisation to examine its activities from a gender perspective and to identify strengths and weaknesses in promoting gender equality issues.

A gender assessment helps to identify and appraise the following elements:

- whether and how gender is mainstreamed in the partner's policies and programmes;
- the partner's interest and capacity to develop and implement a strategy of participation and empowerment of women;
- the technical capacity of the partner to address gender issues in project planning and implementation (existing gender expertise, competence and capacity building in terms of gender mainstreaming in the organisation policies, programmes and projects);
- the appropriate organisational culture and practice that facilitate gender equality (institutional decision-making and responsibility);
- the constraints and the opportunities for the organisation to promote equal rights and opportunities for women;
- the level of resources allocated and spent on gender mainstreaming and gender activities;
- the extent to which human resources policies are gender-sensitive and the percentage of staff technically knowledgeable on gender issues;
- the presence of women in staffing at different levels of the organisation;
- whether there is room for improvement, and possible strategies to better mainstream gender.

The assessment can be conducted through questionnaires[2,] focus groups or workshops. Participatory sessions can be organised to introduce the concepts of gender, organisational development, and capacity building of partners and to enable a first-hand assessment of the attitude, interest and commitment of the participants and their respective organisation towards the developmental role of the partner in general and specifically gender. The main outcome of the assessment is a report that includes recommendations for performance improvement and concrete actions for follow-up by the assessed organisation. On this basis, targeted capacity building and technical assistance on gender integration can be organised in order to address the weaknesses and gaps identified through the assessment.

Integrating gender in an organisation's activities and structures has both an external and internal dimension. Externally, *gender integration* fosters the participation of and benefits to women and men in an organisation's initiatives or services. Internally, gender integration promotes women's leadership and equality in an organisation's own policies and structures.

Gender integration is articulated around four key elements:

- *political will* becomes evident when top-level leadership publicly supports gender integration, commits staff time and financial resources and institute needed policies and procedures;
- these conditions lead to an enabling *organisational culture*, which involves progress towards a gender-balanced staff and governance structure, as well as equal valuing of women and men in the workplace;

---

[2] InterAction's questionnaire has over 90 questions and focuses on how gender equality issues have been addressed in 5 programming dimensions and 6 organisational dimensions. http://www.interaction.org/document/gender-audit-handbook-2010

Oxfam Australia's field gender audit tool has 24 questions focused on how gender equality and women's empowerment are addressed in programmes.

- as the organisational culture evolves, *technical capacity* needs to evolve, including staff skills in gender analysis, adoption of systems for gender-disaggregated data and development of gender-sensitive tools and procedures;
- because gender integration ultimately involves *organisational change*, systems of accountability are also essential. Both incentives and requirements are necessary to encourage and reinforce new behaviour, within individuals and within an organisation as a whole. [3]

2.2 Phases of project implementation

2.2.1 Contract Management

The **Contract** signed between AIDOS (as Applicant or Lead Organization, in case of Consortium) and any Donor/Contracting Authority is the legal framework in which the project activities are carried out. It defines the purpose of the grant, the duration, the reporting system, payments schedule and it is the main document AIDOS and its Partners shall refer to.

Any changes occurring in the planned activities or/and in the budget requested by the Partners shall be written to AIDOS as they need to be requested and approved by the Donor/Contracting Authority, either with an **amendment** and/or an **addendum**.

In general, the Contract includes the paragraph **General conditions**, setting administrative and financial provisions that should be strictly followed. Those provisions are reflected into the **Project Agreement** that is signed, after the project approval, between AIDOS (as Applicant/Lead Organization) and the Project Partners. The Project Agreement also defines tasks and responsibilities of Applicant and Partners, as well as the payment schedules (ex. Annex 1).

Whether the project implementation foresees the involvement of **External Experts** and/or **Subcontractors** by the Applicant and/or the Partners, a contract should be signed also with them in order to define their tasks and responsibilities, the consultancy/service duration as well as fees and terms for payment.

2.2.2 Staffing, induction and capacity building of project staff

Specialists are usually internal to the structure, while others can be outsourced. Internalising some specific roles is necessary for the effectiveness, continuity and stability of the project. Some roles are covered whenever possible by women in order to ensure gender sensitivity and the appropriate gender approach.

When selecting human resources, it is important to take into account the following elements:

- *gender sensitive attitude and experience.* Often service providers are unaware of and do not cater for the needs of women. For example, services might be planned and delivered without consideration of women's household/farm/enterprise tasks. Another observation is that service providers might have no practical experience to rely on, which makes services at times irrelevant. Women often express the need to be advised and mentored

---

[3] The Gender Audit Questionnaire Handbook Commission on the Advancement of Women, InterAction, 2003.

wherever possible by other women, and generally, by people who are able to empathise with their situation and challenges.

- *appropriate male-female balance in the composition of the project team* (both team members and outsourced specialists) based on social and cultural factors at community level (e.g. project staff visiting women's premises should respect the community and family norms).
- *the level of expertise of the team members* should be defined on the basis of the *specific capacity building needs of the target group*, with attention to an *appropriate trade-off between knowledge and gender balance*.

Recruiting human resources need to incorporate the gender perspective as follows:

- terms of references should clearly mention gender-sensitivity and relevant characteristics should be highlighted (empathy and motivation);
- contract conditions need to be attractive enough to select the best possible staff with appropriate technical skills as well as gender sensitivity, ideally to retain them until the completion of the project and minimise the transaction costs of distance between women and service providers. Salary level, reimbursement policy, working conditions and incentives[4] should ensure the recruitment of professional and qualified female staff;
- an Ethical Code and a conflict of interest declaration need to be annexed to staff contracts in order to ensure that also outsourced providers commit themselves to strict confidentiality and impartiality in the implementation of their tasks;
- trainers and facilitators must have a clear understanding of the gender dimension of each topic, e.g. how the gender dynamics affect people differently, how women, men and LGBTQI+ people have different roles and different access to resources in the community and local economy, the compounding social factors, etc. In the very early stage of recruitment, it is advisable to have induction sessions on the gender aspects of entrepreneurship, reproductive health, education etc., major challenges and risk-mitigation strategies;
- newly recruited staff should attend orientation in order to strengthen their awareness of the gender dimension;
- trainers should adopt gender-sensitive facilitation and training methods, so as to deliver technical knowledge in an environment that is conducive to discussion and sharing and to put all participants at ease;[5]
- gender –related implications should be identified and highlighted in the different roles played by the team members, which also allows for different approaches to work on various gender constraints and weaknesses.[6]

---

[4] The incentives policy which can include an end-of-year productivity-based bonus granted in the form of training opportunities, study time or other skill-enhancing devices.

[5] General guidelines on this issue are provided in the Global Resource Database at http://www.bridge.ids.ac.uk/go/global-resources. The guidelines focus on the integration of the gender dimensions in each subject, to equally express opinions, experiences and views, to create the atmosphere in which women feel respected, safe and encouraged to share their views. This is to encourage women's active involvement in the training and to share the valuable experience and knowledge of more experienced women.

[6] This applies for example to the trainers' role in strengthening women's knowledge in business management, to the coaches' role in supporting women to increase their personal and entrepreneurial capabilities, skills and self-confidence, and to the mentors' role as behavioural models of effective networking for business survival and growth.

Human resources development (HRD), including technical assistance and training, is the key quality component provided by AIDOS during project implementation. This is aimed at long-term capacity building and performance improvement, and it is carried out with the support and cooperation of carefully selected experts.

All projects include substantial inputs of technical assistance and advice: these are aimed at skill development of project teams. Furthermore, the project defines its human resource development policy in terms of continuous skill upgrading of its team, in order to maintain relevance to the needs of the community. However, staff effectiveness and productivity will not only depend on their technical capability, but also on their motivation and enthusiasm for the project mission. These aspects can also be explored and strengthened through motivational training and awareness-raising sessions aimed at reinforcing shared objectives and team spirit.

The continuous process of capacity building includes a mix of techniques, methods and mechanisms, e.g. in-house formal training sessions, on-the-job informal skill transfer, one-to-one counselling sessions, individual or group-based mentoring and tutoring, outsourced formal training, exposure to debates on specific development subjects through seminars, workshops and conferences. The project staff also participates in study tours (e.g. in Italy[7] or in countries where AIDOS established similar projects) to be exposed to examples of development services and facilities.

AIDOS technical assistance focuses on guidance and tutoring of the local staff, rather than on traditional training, in order to improve their professional skills and to strengthen their decisional and managerial capacities. This approach aims at guiding the staff through key decisions and choices, for example related to: the definition of the project strategic objectives and specific methodology adapted to the local context; the modalities of operational management; and the identification of field-based activities and their specific content.

The first formal step in the HRD process is an induction workshop for the project staff.

The induction typically includes:

- a first overall introduction to the project strategy and methodology;
- an awareness-raising session with regard to the team members' individual roles and responsibilities within the project and in relation to their employers, beneficiaries and project stakeholders (with focus on both upward, lateral and forward accountability);
- a preliminary assessment of key skill gaps and consequent capacity building needs of the human resources;
- an introductory training on team-work and participatory planning;
- production of a shared and realistic short-term work-plans for the team.

In order to alternate passive and active learning modes, the induction period includes briefing and presentations as well as interactive training, group work and one-to-one sessions.

The specialist advice and assistance is delivered through various actors, i.e. AIDOS personnel, the international project coordinator and international or local expert

---

[7] In this case, the choice of country is due to the presence of incubators for women-led enterprises, and also to the importance of the small business sector and relevant support structures in the national economy.

consultants selected and overseen by AIDOS in collaboration with the local implementing partner.

The value-added of AIDOS' direct contribution and of its facilitation with regard to accessing expertise is based on its international experience. It also emerges from a systematic adaptation and contextualisation of the models tested over the years in relation to women empowerment.

After the induction regular training and technical assistance missions are conducted by international experts on specific topics resulting from the training needs assessment.

2.2.3 Financial Management

The Contract with the Donor/Contracting Authority fixes the budgetary obligations that also follow international/national legislation. In the case of a Consortium Agreement where AIDOS is the Lead Organization, the partner is responsible for project's financial management according to the Donor's, AIDOS and its own financial procedures.

In general, in the implementation of projects, AIDOS and its Partners should comply with the following standards:

Cash Flow Management

To ensure cash availability whenever necessary, foreseeing an estimation of the amount of cash necessary at each stage of project implementation.

Budget Expenditures Plan

A plan for foreseen expenses structured through **Excel tables,** indicating monthly or quarterly costs, due amounts, payment destinations and payment methods.

Cash Handling System

Petty cash should be limited and payments should be made preferably through bank transfers and/or cheques, rather than in cash, also dedicating to the project a separate account.

2.2.4 Financial Reports

Financial reports should be prepared and submitted at regular intervals in order to verify the progressive use of each budget heading. AIDOS and its Partners will use Excel tables including budget headings approved by the Donor that should be constantly updated during project implementation. This will facilitate the overall Financial Management and easily meet the Donor's reporting requirements.

2.2.5 External Audit

In case of an External Audit, AIDOS will provide the Auditor with all originals or certified copies of official documents (such as Grant Contract, Consortium Agreement and Subcontracting Agreement, reports, invoices, timesheets and bank transfer documents).

3. Monitoring and Evaluation

Monitoring shall be aimed at gathering timely data and information to track the project activities implementation according to a workplan, in order to establish how much

project's inputs are consistent with it and the extent of outputs' achievement. AIDOS project monitoring at local level is normally ensured through the field missions of an International Project Coordinator and International Experts. Partners' staff also conduct monthly visits at local level to the project locations for the technical monitoring of the activities and services delivered.

The **Evaluation** process shall give AIDOS and Partners direct information about the value of projects implemented and how to improve them. The evaluation allows to ask questions about the work done, to collect information and data and use them to track and/or re-plan actions, to support staff and partners in their understanding of the project strengths and weaknesses and make appropriate changes, if necessary.

3.1 Monitoring procedures

Project monitoring is done by AIDOS and its Partners.

The monitoring of project activities is carried out at several levels and through several mechanisms:

- at headquarters' level, AIDOS follows the implementation of the actions by keeping a permanent contact with the partners by mail, telephone, email, video conference, and by receiving regular progressively narrative and financial reports. AIDOS also carries out monitoring missions for the duration of the project;
- at local level, an International Coordinator selected by AIDOS might support the local project manager to facilitate the daily coordination of activities, good practices, transparent management of funds and human resources etc.;
- still at local level, AIDOS International Experts carry out missions of technical assistance and follow – up so that there is a real appropriation of AIDOS approach and methodology Each partner puts in place a monitoring and evaluation mechanism specific to the activities it manages, such as internal meetings, consultations with stakeholders and beneficiaries, monitoring progress towards the goals to be achieved, development of expenditure tracking documents and quarterly narrative and financial reports. Each activity is evaluated internally to verify progresses against the timeline, established indicators and expected results and budget expenditures;
- field monitoring missions, carried out by local coordinators/project managers, enable a close monitoring of activities in the field, to ensure the quality of services and to provide the necessary support to the field team;
- for internal monitoring and evaluation, the local partner shall have tools to monitor and evaluate its own services. These tools shall be adapted to the project indicators and used by the service providers. A compilation of data is done at the end of the quarter to track and measure progress towards the development of an activity report. In addition, fact sheets are developed and submitted to other partners for reporting on their activities under the project.

Expenditure tracking

Partners, in collaboration and with the support of AIDOS Project Coordinators (in the field when available and in Italy) must:

- implement the activities for which they are responsible and which are foreseen in the project document, to be followed up for a correct execution in accordance

with the planned deadlines;

- administer the project locally, use and manage the bank account assigned to the project;
- ensure proper and transparent management of human/financial/physical resources, based on the project document and budget;
- submit narrative reports and quarterly work plans to AIDOS, as per below instructions (see point *Reporting*);
- keep accurate and systematic accounts of the implementation of the project using an appropriate accounting system. This system must be implemented in accordance with the accounting principles and rules that apply at local level. Accounts and expenses related to the action must be easily identifiable and verifiable within the partner's accounting system. The accounts must indicate precisely the interest earned on the funds paid by the donor. Each partner undertakes to ensure that the financial reports (both intermediate and final) are easily reconciled to its accounting system, its accounts and other relevant registers. To this end, each partner must prepare and maintain, for inspection and audit purposes, reconciliations, as well as inventories, analyses and other detailed accounts;
- recruit local staff in accordance with local labour legislation and the Donor's staff selection rules and AIDOS Human resources policy.

Reporting

In order to properly manage activities, to ensure adequate accounting and administrative standards and transparent cooperation in the framework of the project, AIDOS and its Partner agree to clearly define in advance what documentation should be produced in supporting project reports and so avoid claims or refunds by Donors and any Third party.

The following procedures shall be annexed to the Project Agreement signed by AIDOS and its Partner and the signature on it entails acceptance and full compliance by both Parties.

Forms for Reporting

The Partner will report on the execution of activities carried out on a regular basis with the following formats both soft and pdf (signed): Interim Narrative Reports for the descriptive and technical aspects of the project implementation (word and pdf), Financial Reports for the expenditure incurred and paid (excel and pdf).

A final narrative and financial report is due by the end of the project.

Deadline for Reporting (narrative and financial)

The partner is required to report to AIDOS according to a calendar containing the following information:

Report #	Reporting period	Deadline for report delivery to AIDOS (Only files)	Deadline for delivery of scanned copy (via e-mail/Dropbox)
Report #	From-to	10 days after the reporting period deadline	15 days after the reporting period deadline

AIDOS and its partners can establish different deadlines and reporting formats if needed and/or required by the donor.

Exchange rate for Reporting

Expenses in local currency may be reported in EUR applying the InforEuro exchange rate for the month/period in which expenses were made and/or in USD applying both the InforEuro exchange rate and the rate applied by the bank when receiving the transfers of funds from the donors or when changing the transferred funds. In case of use of different exchange rates, the Project Agreement will clearly specify it. The Partner will take responsibility for any loss/gain related to the application of the exchange rate to actual local currency expenses. In some cases AIDOS, for instance when working with grass root organisations, AIDOS may decide to assume the risk and the cost of an exchange rate loss

Supporting documents

<u>Financial Reporting</u>

In order to properly account for its expenditure, AIDOS and the Partner should comply with the following standards. All expenses must be authorized by the Partner's line manager in writing (purchase order, stamp or any other evidence currently in use by the organisation).

In compliance with administrative regulations of the Donor/Contracting Authority, AIDOS and its Partner will provide for each of the expense categories listed below, the following documentation:

Human resources:

- selection procedures (when applicable);
- CVs, contracts/assignments (in English or local language, translated into English);
- terms of reference (ToRs);
- payslips, timesheets (when applicable), invoices/receipts;
- evidence of payment of net salaries and other statutory costs (ex: including the payment of social security, income tax and health insurance etc./if mentioned in the contract) for each month or share of month charged on the project.

Per-diems (DSA):

- receipts signed by the beneficiary stating daily rate applied and number of days, and reason of travel;
- mission approval and report (when required).

Travel and transportation:

- air/train tickets and evidence of payments;
- boarding passes (in case of flight ticket);
- self-certification (when needed);
- car rental invoice;
- fuel and oil expenses, a summary list of the distance covered (car logs), the average consumption of the vehicles used, fuel costs and maintenance costs, fuel receipts;
- taxi/bus receipts;
- participants' transportation: signed receipts of reimbursements of transportation costs;

- mission approval and report (when required).

Purchase of equipment or supplies:

- requests for pro-forma invoices/quotations;
- pro-forma invoices/quotations received;
- formal written acceptance of quotation and order;
- invoices/receipts;
- bill of landing;
- evidence of payment (in case of check, provide also copy of it);
- in case of purchase exceeding € 15,000.00, Partners should consult AIDOS before proceeding.

Contracted/services/consultants:

- requests for quotations;
- quotations received;
- evaluation grid (if applicable);
- formal written acceptance of quotation;
- contract (if any);
- invoices/debt notes/receipt;
- evidence of payment (in case of check, provide also copy of it);
- in case of contracts exceeding € 15,000.00, Partners should consult AIDOS before proceeding.

Expense claim and other costs:

- a cost-occurrence document (invoice or debt note) and evidence of payment (cash receipt, check, bank transfer) for any other cost incurred in the execution of the project;
- any written agreement (contract or other form) will be an additional guarantee of transparency.

Bank statements:

- monthly bank statements of bank account (dedicated/used);
- bank reconciliation document;
- copy of checks and bank transactions for all expenses.

Moreover:

- each copy of the original documents will have to mention the following "copy conforms to original" and will have to be countersigned by the Partner's Treasurer or responsible for the administration;
- each financial document (original and copy) will have to mention the Project code (preferably with a stamp).

The above financial documents will refer to all the project expenses and payments, including the ones funded by other donors and by the Partner for this project.

Any expense not justifiable by project activities nor supported by adequate documentation as above explained cannot be reimbursed by the project budget. The Partner will make sure that all expenses are accompanied by an eligible financial document. In case the financial documentation is not available, AIDOS will not be responsible for its occurrence and its payment and the Partner will bear the cost.

The scanned hard copies of the supporting documentation to be sent to AIDOS should

report the related progressive number both in the scanned document and in the name of the file.

Narrative reporting

The narrative reports must be accompanied by any supporting document deemed to justify the actual implementation of the project activities such as:

- participants' signed attendance sheet per each activity (in Italian and local language or English/French);
- participants' evaluation/appreciation questionnaire per each activity (with title of questionnaire's questions in Italian and local language or English/French);
- certificates of participation (in Italian and local language or English/French);
- photos, videos, social media activities evidence, radio programmes, articles;
- Monitoring mission reports;
- consultants' / trainers' reports;
- material produced etc. (banners, flyers, any other information and training material);
- minutes of coordination meetings;
- summary table with number of beneficiaries (not services) by sex and nationality.

VAT exemption

Regarding VAT, if applicable, the Partner has to produce all the needed documentation to demonstrate it cannot reclaim these costs through an exemption system and/or a refund *a posteriori.*

3.2 Evaluation

Final internal evaluation, when foreseen by the project and duly budgeted, is carried out by an outsourced consultant.

The final evaluation objectives are to:

- make an overall independent assessment about the past performance of the project/ programme, paying particularly attention to the impact of the project actions against its objectives;
- identify key lessons and propose practical recommendations for follow-up actions.

The evaluation study responds to the requirements of the last phase of the project cycle. The consultants shall verify, analyse and assess in detail the following issues (the list is not intended to be exhaustive) referring to the five evaluation criteria endorsed by the OECD-DAC (relevance, effectiveness, efficiency, sustainability and impact), and to the other-specific evaluation criteria (coherence):

Problems and needs (Relevance)

The extent to which the objectives of the development intervention (projects/ programme) are consistent with beneficiaries' requirements, country needs, global priorities and partners' and donor's policies.

The analysis of relevance will focus on the following questions in relation to the design of the project:

- the extent to which the project has been consistent with, and supportive of, the policy and programme framework within which the project is placed, in particular the Country Strategy Paper and National Indicative Programme, and the Partner Government's development policy and sector policies;
- the quality of the analyses of lessons learnt from past experience, and of sustainability issues;
- the project's coherence with current/on going initiatives;
- the quality of the problem analysis and the project's intervention logic and logical framework matrix, appropriateness of the objectively verifiable indicators of achievement;
- the extent to which stated objectives correctly address the identified problems and social needs, clarity and internal consistency of the stated objectives;
- the extent to which the nature of the problems originally identified have changed;
- the extent to which objectives have been updated in order to adapt to changes in the context;
- the degree of flexibility and adaptability to facilitate rapid responses to changes in circumstances;
- the quality of the identification of key stakeholders and target groups (including gender analysis and analysis of vulnerable groups) and of institutional capacity issues;
- the stakeholder participation in the design and in the management/implementation of the project, the level of local ownership, absorption and implementation capacity;
- the quality of the analysis of strategic options, of the justification of the recommended implementation strategy, and of management and coordination arrangements;
- the realism in the choice and quantity of inputs (financial, human and administrative resources);
- the analysis of assumptions and risks;
- the appropriateness of the recommended monitoring and evaluation arrangements.

Achievement of purpose (Effectiveness)

The effectiveness criterion concerns how far the project's results were attained, and the project's specific objective(s) achieved, or are expected to be achieved.

The analysis of Effectiveness will therefore focus on such issues as:

- whether the planned benefits have been delivered and received, as perceived by all key stakeholders (including women and men and specific vulnerable groups);
- whether intended beneficiaries participated in the intervention;
- in institutional reform projects, whether behavioural patterns have changed in the beneficiary organisations or groups at various levels; and how far the changed institutional arrangements and characteristics have produced the planned improvements (e.g. in communications, productivity, ability to generate actions which lead to economic and social development);
- if the assumptions and risk assessments at results level turned out to be inadequate or invalid, or unforeseen external factors intervened, how flexibly

management has adapted to ensure that the results would still achieve the purpose; and how well has it been supported in this by key stakeholders including Government, Commission (HQ and locally), etc.;

- whether the balance of responsibilities between the various stakeholders was appropriate, which accompanying measures have been taken by the partner authorities;
- how unintended results have affected the benefits received positively or negatively and how this could have been foreseen and managed.;
- whether any shortcomings were due to a failure to take account of cross-cutting or over-arching issues such as gender, environment and poverty during implementation.

Sound management and value for money (Efficiency)

The efficiency criterion concerns how well the various activities transformed the available resources into the intended results (sometimes referred to as outputs), in terms of quantity, quality and timeliness. Comparison should be made against what was planned.

The assessment of Efficiency will therefore focus on such issues as:

- the quality of day-to-day management, for example in:
  a. operational work planning and implementation (input delivery, activity management and delivery of outputs), and management of the budget (including cost control and whether an inadequate budget was a factor);
  b. management of personnel, information, property, etc.;
  c. whether management of risk has been adequate, i.e. whether flexibility has been demonstrated in response to changes in circumstances;
  d. relations/coordination with local authorities, institutions, beneficiaries, other donors;
  e. the quality of information management and reporting, and the extent to which key stakeholders have been kept adequately informed of project activities (including beneficiaries/target groups);
  f. respect for deadlines.

- extent to which the costs of the project have been justified by the benefits whether or not expressed in monetary terms in comparison with similar projects or known alternative approaches, taking account of contextual differences and eliminating market distortions;
- partner country contributions from local institutions and government (e.g. offices, experts, reports, tax exemption, as set out in the LogFrame resource schedule), target beneficiaries and other local parties: have they been provided as planned?
- donor's (e.g. procurement, training, contracting, either direct or via consultants/bureaux): have they been provided as planned?
- technical assistance: how well did it help to provide appropriate solutions and develop local capacities to define and produce results?
- quality of monitoring: its existence (or not), accuracy and flexibility, and the use made of it; adequacy of baseline information;
- did any unplanned outputs arise from the activities so far?

Achievement of wider effects (Impact)

The term impact denotes the relationship between the project's specific and overall objectives.

At impact level the final or ex-post evaluation will make an analysis of the following aspects:

- extent to which the objectives of the project have been achieved as intended, in particular the project planned overall objective;
- whether the effects of the project:
  a) have been facilitated/constrained by external factors;
  b) have produced any unintended or unexpected impacts, and if so how have these affected the overall impact;
  c) have been facilitated/constrained by project/programme management, by co-ordination arrangements, by the participation of relevant stakeholders;
  d) have contributed to economic and social development;
  e) have contributed to poverty reduction;
  f) have made a difference in terms of gender equality;
  g) have made a difference in terms of cross-cutting issues like environment, good governance, conflict prevention etc.;
  h) were spread between economic growth, salaries and wages, foreign exchange, and budget.

Likely continuation of achieved results (Sustainability)

The sustainability criterion relates to whether the positive outcomes of the project and the flow of benefits are likely to continue after external funding ends or non funding support interventions (such as: policy dialogue, coordination).

The final evaluation will make an assessment of the prospects for the sustainability of benefits on basis of the following issues:

- the ownership of objectives and achievements, e.g. how far all stakeholders were consulted on the objectives from the outset, and whether they agreed with them and continue to remain in agreement;
- policy support and the responsibility of the beneficiary institutions, e.g. how far donor policy and national policy are corresponding, the potential effects of any policy changes; how far the relevant national, sectoral and budgetary policies and priorities are affecting the project positively or adversely; and the level of support from governmental, public, business and civil society organizations;
- institutional capacity, e.g. of the Government (e.g. through policy and budgetary support) and counterpart institutions; the extent to which the project is embedded in local institutional structures; if it involved creating a new institution, how far good relations with existing institutions have been established; whether the institution appears likely to be capable of continuing the flow of benefits after the project ends (is it well-led, with adequate and trained staff, sufficient budget and equipment?); whether counterparts have been properly prepared for taking over, technically, financially and managerially;
- the adequacy of the project budget for its purpose particularly phasing out prospects;
- socio-cultural factors, e.g. whether the project is in tune with local perceptions

of needs and of ways of producing and sharing benefits; whether it respects local power- structures, status systems and beliefs, and if it sought to change any of those, how well-accepted are the changes both by the target group and by others; how well it is based on an analysis of such factors, including target group/ beneficiary participation in design and implementation; and the quality of relations between the external project staff and local communities;

- financial sustainability, e.g. whether the products or services being provided are affordable for the intended beneficiaries and are likely to remained so after funding will end; whether enough funds are available to cover all costs (including recurrent costs), and continued to do so after funding will end; and economic sustainability, i.e. how well do the benefits (returns) compare to those on similar undertakings once market distortions are eliminated;
- technical (technology) issues, e.g. whether (i) the technology, knowledge, process or service introduced or provided fits in with existing needs, culture, traditions, skills or knowledge; (ii) alternative technologies are being considered, where possible; and (iii) the degree in which the beneficiaries have been able to adapt to and maintain the technology acquired without further assistance;
- Wherever relevant, cross-cutting issues such as gender equity, environmental impact and good governance; were appropriately accounted for and managed from the outset of the project.

Mutual reinforcement (coherence)

The extent to which activities undertaken allow the donor to achieve its development policy objectives without internal contradiction or without contradiction with other policies. Extent to which they complement partner country's policies and other donors' interventions.

Considering other related activities undertaken by Government or other donors, at the same level or at a higher level:

- likeliness that results and impacts will mutually reinforce one another;
- likeliness that results and impacts will duplicate or conflict with one another.

Connection to higher level policies (coherence)

Extent to which the project/programme (its objectives, targeted beneficiaries, timing, etc.):

- is likely to contribute to / contradict other donor's policies:
- is in line with evolving strategies of the donor and its partners.

THE EVALUATION APPROACH / PROCESS

Once the evaluation team has been contractually engaged, the evaluation process is generally carried out through three phases: a Desk Phase, a Field Phase and a Synthesis Phase, as described below:

Desk Phase – Inception

In the inception stage of the Desk Phase, the relevant programming documents are reviewed, as well as documents shaping the wider strategy/policy framework. The evaluation consultant will then analyse the logical framework. The relevant programming documents should also be reviewed, as well as documents shaping the

wider strategy/policy framework. On the basis of the information collected the evaluation team should:

- describe the development co-operation context;
- comment on the logical framework;
- comment on the issues / evaluation questions suggested or, when relevant, propose an alternative or complementary set of evaluation questions justifying their relevance. Develop the evaluation into sub-questions identify provisional indicators and their verification means, and describe the analysis strategy;
- confirm the final time schedule.

Desk phase - Finalisation

In the finalisation stage of the Desk Phase, the evaluation team should carry out the following tasks:

Review systematically the relevant available documents such as Country Strategy Paper and Indicative Programmes, Governmental national and sector policy documents, Project document, log frame and budget, Project financing agreement and addenda, Project's Global and Annual Operational Plans, Project's annual progress reports, and financial reports submitted by AIDOS to the donor and budget revisions, Partners' activity reports, Technical assistance mission reports, any external and internal monitoring reports of the project, Information, communication and training materials produced by the project; Management information System:

- relevant documentation from national/local partners and other donors.
- Relevant policy and planning documents from national/local partners and other donors;
- present an indicative methodology to the overall assessment of the project/programme;
- interview the *project* management (national project coordinators) *and key partners in the concerned country*;
- present each evaluation question stating the information already gathered and their limitations provide a first partial answer to the question, identify the issues still to be covered and the assumptions still to be tested, and describe a full method to answer the question;
- identify and present the list of tools to be applied in the Field Phase;
- list all preparatory steps already taken for the Field Phase.

At the end of the desk phase a brief summary of the main issues and findings shall be prepared.

Field phase

The evaluation consultant should:

- submit a detailed work plan with an indicative list of people to be interviewed, surveys to be undertaken, dates of visit, itinerary, and name of team members in charge. This plan has to be applied in a way that is flexible enough to accommodate any   last-minute difficulties in the field. If any significant deviation from the agreed work plan or schedule is perceived as creating a risk for the quality of the evaluation, these should be immediately discussed with the project management (by email or telephone);

- ensure adequate contact and consultation with, and involvement of, the different stakeholders; working closely with the relevant government authorities and agencies during their entire assignment. Use the most reliable and appropriate sources of information and will harmonise data from different sources to allow ready interpretation.

Synthesis phase

This phase is mainly devoted to the preparation of the draft final report. The consultant will make sure that:

- the assessments are objective and balanced, affirmations accurate and verifiable, and recommendations realistic;
- when drafting the report, s/he will acknowledge clearly where changes in the desired direction are known to be already taking place, in order to avoid misleading readers and causing unnecessary irritation or offence. If the draft report is of sufficient quality, *the project management* will circulate it for comments to the reference group members, and convene a meeting in the presence of the evaluation consultant. On the basis of comments expressed by the reference group members, and collected by the evaluation consultant, the evaluation consultant has to amend and revise the draft report. Comments requesting methodological quality improvements should be taken into account, except where there is a demonstrated impossibility, in which case the evaluation consultant should provide full justification. Comments on the substance of the report may be either accepted or rejected. In the latter instance, the evaluation consultant is to motivate and explain the reasons in writing.

4   Annexes

The template provided might be adapted according to specific needs, donor's or partners requirements

Annex 4.1 Project Agreement Template

Project Agreement

between

the Associazione Italiana Donne per lo Sviluppo

(Italian Association for Women in Development) - AIDOS

and

Partner's name

ARTICLE 1

The Agreement

The Associazione Italiana Donne per lo Sviluppo Onlus (Italian Association for Women in Development Onlus), (hereinafter referred to as "**AIDOS**") and ………………….. (hereinafter referred to as "…………………."), have hereby agreed to undertake the obligations specified under the terms of this agreement with regard to the implementation of the project entitled "………………….", Code: ………………….. (hereinafter referred to as "the **Project**").

The aim of this agreement is to ensure the correct, efficient and responsible implementation of the Project approved by …………………., hereinafter referred to as the "………………….", and according to the …………………   rules and regulations.

ARTICLE 2

The Project description

The project objectives, methodology, target groups, expected results and activities are described in the Project document entitled "………………….", that shall be the basis of and an integral and substantial part of this Agreement. Both parties have to operate in accordance to the …………………   documents hereby attached (hereinafter referred to as the "…………………   **Documents**"):

- Annex 1   Project document
- Annex 2   Guidelines on the eligibility of expenditure
- Annex 3   Detailed Budget and Contributions Plan including
  - Budget allocated to ………………….
  - Activity budget
- Annex 4   Narrative and financial report forms
- Annex 5   Fund request template

It is expressly agreed that all the terms in capital letters in this Agreement will have the same meaning ascribed thereto in the ……………   Documents.

ARTICLE 3

General Conditions

The project activities must be implemented according to the international principles of humanitarian programmes and the best practices in development, with particular regard to the "Guidelines on the eligibility of expenditures".

…………………. and AIDOS undertake to work in close co-ordination towards the successful implementation of the project activities.

…………………. undertakes to cooperate fully with AIDOS. …………………. will be responsible to obtain, from ………. competent authorities and organizations, all the necessary authorizations and permissions required for the implementation of the project, and to inform AIDOS promptly of any problems occurring in the implementation of the part of the project …………………. is responsible for.

In the event that a Project amendment is needed, …………………. shall consult AIDOS to agree on such amendment following …………………. guidelines and the Agreement will be revised accordingly. Expenses, which are not included in the approved budget, are not allowed until receiving formal, written approval of the amendment by the ………………….

Each organization will ensure its commitment to the national laws concerning their relations with the Government statutory taxes duties and any relevant legislation wherever applicable.

The parties undertake to act in compliance with AIDOS:

- Code of Ethics
- Child safeguarding policy
- Ethics policy for corporate donation

Communications between partners shall be in writing and delivered by hand or e-mail, prepaid postage at the following addresses:

To AIDOS	To ………………….
Name: ………………….	Name: ………………….
Position: ………………….	Position: ………………….
Email: ………………….	Email: ………………….

ARTICLE 4

Financial Provisions

The maximum budget for the activities run in ……………. by ……………. is **Euros** ….

………………….will contribute to the budget with a co-financing of **Euros** ……………. **(…%).**

As the ………pre-finances ………% of its contribution (………% of project budget), ………will advance the remaining ………% of ………contribution of ………budget.

Instalments will be disbursed in Euro and upon reception and approval by AIDOS of narrative and financial reports as follows:

A first disbursement of Euros ………upon reception of funds from ……….

- o ………will send a 1st intermediate narrative and financial report, regarding the 1st quarter (………), including copies of the financial documents (marked with the project stamp) of the costs incurred in the same period, to be received from AIDOS before ………;

A second disbursement of **Euros** ………, upon reception and approval of a 2nd intermediate narrative and financial report, regarding the 2nd quarter (………–………), including copies of the financial documents (marked with the project stamp) of the costs incurred in the same periods, to be received from AIDOS before ………; and upon reception of funds from ……….

- • ………will send a 3rd intermediate narrative and financial report, regarding the semester ……… – ………, including copies of the financial documents (marked with the project stamp) of the costs incurred in the same period, to be received from AIDOS before ………;

A third disbursement of **Euros** ……… upon reception and approval of a 4th intermediate narrative and financial report, regarding semester ……… – ………, including copies of the financial documents (marked with the project stamp) of the costs incurred in the same periods, to be received from AIDOS before ………; and upon reception of funds from ……….

- • ………will send a 5th intermediate narrative and financial report, regarding the semester ……… – ………, including copies of the financial documents (marked with the project stamp) of the costs incurred in the same periods, to be received from AIDOS before ………;

A fourth disbursement of **Euros** ………upon reception and approval of a 6th intermediate narrative and financial report, regarding the semester ……… – ………, including copies of the financial documents (marked with the project stamp) of the costs incurred in the same periods, to be received from AIDOS before ………; and upon reception of funds from ……….

A final disbursement of **Euros** ………upon reception and approval of the 7th intermediate narrative and financial reports regarding the semester …… – … and the final narrative and financial report, including copies of the financial documents (marked with the project stamp) of the costs incurred in the same period, to be received from AIDOS before ……… and after the approval of narrative and financial reports by ………and ………final transfer of fund.

All disbursements subject to the submission of an intermediate financial report will be processed by AIDOS at the condition that the latest financial report displays a minimum reported expenditure equal to or higher than the 80% of previous disbursed amounts.

The funds will be transferred by AIDOS to … directly to the following bank account in the name of …:

Account Details:

Account Holder Name:

Address:

Bank Name:

Bank branch:

Account number:

Currency of account:

Type of Account:

SWIFT Code:

ARTICLE 5

Roles and responsibilities of the Parties

Shared roles and responsibilities

- Partners shall implement the action as defined in the Project Document
- Both Partners shall keep each other informed on activities / issues related to the Project. The Partners shall inform each other regarding meetings, discussions, and presentations held with relevant stakeholders in other coordination forums related to the Project. This exchange of information will pass through constant copy of relevant mails and will be reported within the monthly meeting.
- Both partners commit themselves to preserve the integrity of all documents, information or other produced materials related to the Project.
- Partners will take all necessary steps to publicize in coordination with each other, the fact that the ………and other donors have co-financed the Project. Such measures must comply with the relevant rules on the visibility of external actions laid down by the donors to the Project. In particular, ………and AIDOS shall mention the Project and the ………financial contribution in information given to the final recipients of the Project, in its internal and annual reports, and in any dealings with the media. In all external communication materials the logo of AIDOS, ………, ………and ………should be inserted together with the following credits: Co-Funded by the ………. Shall make certain that the publications and visibility materials are developed and published in compliance of IMOI's communication and visibility guidelines and agreed among partners, ensuring adequate visibility to ………and to all partners.

Responsibilities of AIDOS

AIDOS will:

- be responsible for the overall execution and supervision of the Project before ………and the ……….
- be responsible for all communication to ………and the ……….;
- supervise and support the implementation of project activities with special emphasis on quality of deliverables and guaranteeing youth and gender sensitive approach on any aspect of project implementation;
- be responsible for the timely transfer of funds received by ………for the implementation of Project activities for the maximum of Euros ………on the basis of the work plan and the disbursement plan (see Article 4);
- be responsible to submit any request for changes to ………and the ……….;
- coordinate and implement the capacity building component of the project and organize technical assistance missions;
- organize advocacy and information activities in Italy;
- advise in selecting and hiring the local staff foreseen by the Project in collaboration and agreement with ………staff and AIDOS experts;
- execute the monitoring and evaluation missions as stated in the project

document;

- prepare all financial and progress reports for the ....;
- provide .... with copy of all narrative and financial reports submitted to ....and the ....;
- be responsible for assessing and evaluating the international staff and consultants taking the partners' feedback into consideration;
- keep in its own office all original evidence of all the documents related to the implementation of project activities and will make them available for inspections from ....and ....annual external audit to the Project. AIDOS will keep all the documents for seven year after the Project ending;

Responsibilities of ……………… will:

- operate within the project agreement signed with the ……government on …. ;
- be responsible to the best of its ability, for ensuring that project activities are carried out in line with the Project document and ……… laws and regulations;
- be responsible for selecting and hiring human resources and contractors who meet the required standards for the implementation of the Project in collaboration and agreement with AIDOS staff and experts and in the respect of ....laws in terms of employment contracts and benefits. Selections and hiring shall be free of discrimination because of race, religion, sex, sexual orientation, gender identity, disability status, ethnicity, national origin and/or similar factors;
- be responsible for the proper, transparent and correct management of project resources (financial, human and material) allocated to and managed by ....as per the Project document;
- be fully responsible for all work and services performed by its personnel, agents, employees, advisors, consultants, contractors or sub-contractors and will make clear to them that no contractual relation exists between them and AIDOS or ....;
- provide AIDOS with all relevant and updated documents related to the legal status of the organization, by-laws, registration/renewal of the organization, tax exemption/clearance certificate, management system and other relevant information;
- ensure that funding shall neither be used for the promotion of any political or confessional activities;
- guarantee that the received funds are utilized in a cost-effective way, and according to good accounting standards and procedures;
- be responsible for the purchase of equipment according to ……… rules and regulations;
- engage to respect the criteria for eligibility of the costs provided in the guidelines of the ....and where not specified to AIDOS internal guidelines. In case of infringement of the relevant provisions contained in this agreement, the costs will not be considered eligible. In case of non-recognition by the ....of any expenses, they will not be refunded neither considered as co-funding;
- provide AIDOS with all required information on the implementation of the Project. To that end, ...will submit to AIDOS narrative and financial reports with the schedule mentioned at Article 4 following the ....reporting format provided by AIDOS (Annex 4). They shall cover the Project as a whole, regardless of which part of it is financed by the .... Each report must provide

a full account of all aspects of the Project's implementation for the period covered;

- justify all expenses with appropriate supporting documents and ensure that internal financial control procedures are in place. All financial transactions will be documented with sufficient details (such as purchase requests, quotations, purchase orders, payroll, traveling expenses, timesheets, bills etc.) as per Annex 2;

- keep accurate and regular accounts of the implementation of the Project using an appropriate accounting and double-entry bookkeeping system. This system shall be run in accordance with the accounting and bookkeeping policies and rules that apply in …… Accounts and expenditure relating to the Project must be easily identifiable and verifiable. This can be done by ensuring that expenditure for the Project concerned can be easily identified and traced to and within …… accounting and bookkeeping systems. Accounts must provide details of interest accruing on funds transferred by AIDOS. … shall ensure that the Financial Reports (both interim and final) can be properly and easily reconciled to …… accounting and bookkeeping system and to the underlying accounting and other relevant records. For this purpose the …… shall prepare and keep appropriate reconciliations, supporting schedules, analyses and breakdowns for inspection and verification;

- each financial document (original or copy) must be stamped with the following project stamp: …. The above financial documents will refer to all the Project expenses and payments, including those funded by other donors and by … for this Project;

- failing to comply with these reporting obligations may result in the suspension of the transfer of funds to …….

- ……… agrees to use all funds made available by the …… solely for the implementation of the Project activities. If any irregularities, misappropriation, or misuse of fund is detected by AIDOS or by an audit during or after the period of program and if ………fails to justify the cost with sufficient reasons, the amount must be refunded to AIDOS immediately;

- any payment made by ………. to any third party above ………will be done via bank transfer or cheque. ………. will submit to AIDOS copies of transfer proofs (including copies of the cheques);

- funds used for the purchase of supplies, services and works will be managed according to the Detailed Partners Budget and to the Guidelines (Annex 2). Notify to AIDOS any changes of address and/or bank account;

- submit a request of advance of funds to AIDOS according to Article 4 of this Agreement and using the Fund request template (Annex 5). Upon termination of this agreement, ………shall refund AIDOS, within fifteen (15) days of the date of termination, any fund, which may have not been disbursed or legally committed to that date;

- apart from the first instalment, already transferred upon signature of the Agreement, the exact amount of the instalments shall be based on progress achieved, ………compliance with the outputs and the approval of financial and narrative reports by AIDOS;

- AIDOS shall transfer the funds upon the receipt of funds from ………, should any delay occur from ……, AIDOS shall not be held accountable for the delay;

- accounting and financial documentation of the Partners shall adhere to the financial and reporting procedures of the IMOI and shall be prepared by ………

Finance Section and approved by ………Director General;

- allow monitoring and casual visits by AIDOS staff from Italy and from the donors to the Project and accept requests by AIDOS for assessment or evaluation of the Project activities at any time. Allow and facilitate evaluation missions by an independent expert;
- assist AIDOS staff and international experts during the technical assistance missions;
- make available its office space, equipment and facilities (use of desk, computer, printer, telephone, internet, etc.) and car during AIDOS missions to the field for the implementation of their duties;
- inform AIDOS without delay of any circumstances likely to hamper or delay the implementation of the Project and work in close coordination with AIDOS in order to solve these circumstances.

ARTICLE 6

Duration of the project agreement

The present agreement validity begins on the date of signature until the approval of the Final Narrative and Financial Audited Report by the ………. The present agreement may be extended with the written agreement of both parties. The costs of the Project are eligible from the ……… until ……….

ARTICLE 7

Amendment

Any amendment to this Agreement, including the annexes thereto, must be set out in writing in an addendum.

If an amendment is requested, it must be requested to the other party at least one month before the date on which the amendment should enter into force, unless there are special circumstances duly substantiated and accepted by both parties. AIDOS will submit the request for amendment to ………for ………approval according to the rules of the ………, which co-finances this Project.

ARTICLE 8

Coordination, Monitoring and Supervision

This agreement envisages the concept of partnership based on principles of reciprocal respect and mutual understanding, strengthening and empowering both signatories' parties.

Hence:

- the parties commit themselves to meet regularly, once a month, to review the project implementation and evaluate together progress   in order to find agreed and inclusive solutions to better achieve the project objectives. AIDOS Project Coordinator in ……will be in charge of calling meetings on a regular basis and to set the agenda. However, …staff is entitled to request a meeting or suggest the inclusion of issues in the agenda;
- partners shall conduct Project Management Committee (PMC) meetings on a quarterly basis and with the modalities described in the Project Document. The agenda of the meetings will be circulated before the date and minutes –with action points - will be produced at the end of each meeting;
- a partnership review meeting is to be conducted at the end of the first and the

second project year and the end of the 5th semester of the project life as part of the PMC. The scope of the partnership review meeting is, among others, to update the Action Plan and the Detailed Partners Budget and Contributions Plan;

- conduction of Assessments and monitoring missions is detailed in the attached administrative procedures.

ARTICLE 9

Early termination

The Memorandum shall be lawfully terminated, and without any form of mutual compensation, with immediate effect on the occurrence of any of the following events:

- in case that the ………, for any unpredictable reason, should decide to suspend, void or cancel the project, this Agreement will be suspended, voided or cancelled consequently, with no penalties or damages or liabilities to claim to AIDOS for any reason or under any law Cessation of AIDOS activities;
- any adverse publicity regarding one of the Partners;
- any proved misuse of funds of the program.

In such an event, the parties shall undertake all possible steps to reduce the costs of the interruption of the agreement to a minimum, and to relinquish any claim to compensation other than in respect of expenses actually incurred.

Additionally, the Parties agree that either ………or AIDOS may cancel the present agreement at any time with prior written notice of not less than three months, provided that the ……… accepts the cancellation.

ARTICLE 10

Force majeure

Neither Party shall be considered to be in default or in breach of its obligations under the contract if the performance of such obligations is prevented by any event of force majeure arising after the date of notification of award or the date when the contract becomes effective, whichever is the earlier.

For the purposes of this Article, the term "force majeure" means unforeseeable acts, strikes, lock-outs or other industrial disturbances, acts of the public enemy, wars whether declared or not, blockades, insurrection, riots, epidemics, landslides, earthquakes, storms, lightning, floods, washouts, civil disturbances, explosions and any other similar unforeseeable events which are beyond the Parties' control and cannot be overcome by due diligence.

If either Party considers that any circumstances of force majeure have occurred which may affect performance of its obligations, it shall promptly notify the other Party giving details of the nature, the probable duration and the likely effect of the circumstances. Unless otherwise directed by AIDOS Project Manager in writing, ………shall continue to perform the activities under the project and this Agreement as far as is reasonably practicable, and shall employ every reasonable alternative means to perform any obligations that the event of force majeure does not prevent ………from performing. ………. shall not employ such alternative means unless directed to do so by AIDOS.

ARTICLE 11

Resolution of Disputes – Governing Law and Jurisdiction

Any dispute, controversy or claim relating to the present Agreement shall be settled by

direct negotiation and both Partners will make their best effort to negotiate and resolve the dispute amicably.

In terms of relevance the ……… approved Project Document –and its official annexes - will represent a primary source of interpretation while the present Agreement a secondary source.

In those cases in which the resolution of disputes cannot be reached by mutual agreement, ………. and AIDOS agree to submit the controversy to the mediation of a third-party arbitrator acceptable to both parties.

Failing any attempt to solve the dispute amicably within 30 days, a council of arbitration will be settled, each of the Partners will appoint one arbitrator and all the arbitration proceedings shall be conducted in the English language. Any arbitration award shall be considered to be final and binding on each of the Partners involved in the dispute. Any legal matter not explicitly regulated by the present Agreement shall refer to the Laws of ……….

In witness hereof, the Parties hereto, each acting through its duly authorized representative, have put their signature and seal.

For and on behalf of AIDOS   For and behalf of ………

Signature _____   _____

Name   _____   _____

Title   _____   _____

Date   _____   _____