

## Appendix 1



# CRCID

## Canadian Rotary Collaboration for International Development

1579 Hyde Park Road – London, ON – N6H 5L4  
Phone: (519) 473-2100 – Fax: (519) 471-8982  
Email: [rotary@crcid.org](mailto:rotary@crcid.org) - Website: [www.crcid.org](http://www.crcid.org)



This Contribution Agreement made in duplicate

Between The Canadian Rotary Collaboration for International Development (CRCID),  
*a legal entity having its Head office/principal place of business at:*  
  
1579 Hyde Park Road  
London, Ontario N6H 5L4

And **Partner Rotary Organization** ("Organization"), *a legal entity having its Head  
office/principal place of business at:*

< Address Line 1 >  
< Address Line 2 >  
< Address Line 3 >

WHEREAS the Organization continues to execute the **(Name of Program)** Program (the  
"Program") as described in Part B of the Specific Terms and Conditions, for  
which the Organization is requesting a contribution from CRCID;

AND WHEREAS CRCID wishes to make a contribution to the Organization toward the  
execution of the Program entitled **Name of Program**;

AND WHEREAS CRCID has entered into an agreement with CIDA to which the Organization  
is not a party

THEREFORE, CRCID and the Organization agree as follows:

### 1 Purpose of this Contribution Agreement

CRCID hereby makes a contribution to the Organization ("Contribution") solely for the continued execution of the Program in accordance with the terms and conditions specified in this Contribution Agreement ("Agreement").

### 2 Contributions of the Parties

2.1 Subject to the terms and conditions of the Agreement, CRCID agrees to make a contribution to the Program of an amount not exceeding **amount in written form** Canadian dollars (CAN **\$XXXXXXXX**), representing the Contribution set forth in Part C of the Specific Terms and Conditions.

2.2 Cost Sharing - The Organization will supply and manage all financial, human and material resources necessary to carry out the cost-shared Program other than indicated in clause 2.1 above, including a contribution to Canadian costs or resources. The Organization's cash contribution to the Program will be equivalent to at least **XXXXX** percent (**XX%**) of the cost-shared Program, totalling a minimum of **amount in written form (CAN \$XXXXX)**. The amount of CRCID's contribution will be subject to the Organization respecting its cost-sharing obligations.



# CRCID

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- 2.3 The Organization undertakes to obtain other sources of funds and to contribute its own funds as stipulated in Part C of the Specific Terms and Conditions.
- 2.4 The Organization shall not use its minimal cost-sharing contribution under this Agreement as a further cost-sharing component for, or duplicate charge against Canadian Government funds in other activities of the Organization.

### 3 Representative

For the purposes of the Agreement, the CRCID Board of Directors designates the Chief Administrative Officer as the Representative.

### 4 Notice or Communication

- 4.1 Any notice or communication to CRCID shall make reference to both the title of the Program **(Name of Program)** and the CRCID Program number of the Agreement and be addressed to:

**Canadian Rotary Collaboration for International Development (CRCID)**

1579 Hyde Park Road  
London, ON, Canada N6H 5L4  
Attention: Program Officer,

Telephone number: (519) 473-2100  
Facsimile number : (519) 471-8982  
E-mail address : [kwebb@ccid.org](mailto:kwebb@ccid.org)

- 4.2 Any notice or communication to the Organization shall make reference to both the title of the program and the CRCID Program number of the Agreement and be addressed to:

**Partner Organization (Organization)**

< Address Line 1 >

< Address Line 2 >

< Address Line 3 >

Attention : < Title of Organization Representative >

Telephone number : < Telephone - Organization Representative >

Facsimile number : < Fax - Organization Representative >

E-mail address : < E-mail - Organization Representative >

### 5 Applicable Laws

The Agreement shall be governed by and construed in accordance with the laws in force in the Province of \_\_\_\_\_ (Canadian province where organization incorporated or Ontario).

### 6 Description of the Agreement

- 6.1 The following documents and any amendments relating thereto form the Agreement between CRCID and the Organization:

6.1.1 these **Articles of Agreement**;

6.1.2 the **Specific Terms and Conditions**;



# CRCID

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- Part A - Special Terms and Conditions;
- Part B - Program Description;
- Part C - Budget;
- Part D - Financial Terms;
- Part E - Reporting Requirements.

**6.1.3** The CIDA Contribution Agreement - General Terms and Conditions are attached thereto and, by initialling hereunder, we confirm having read them. The organization referred to in the aforementioned document is understood to be CRCID.

\_\_\_\_\_  
*Initials*

\_\_\_\_\_  
*Name of authorized Organization Representative*

\_\_\_\_\_  
*Position within the Organization*

6.1.4 In the event of any conflict between the provisions of the Articles of Agreement, the Specific Terms and Conditions and the General Terms and Conditions, the provision within the document first cited (including any amendments relating thereto) in this provision prevails.

### **7 Effective Date**

The Agreement shall become effective on the date of the last signature.

### **8 Duration**

Unless sooner terminated as provided for in the Agreement, the Agreement shall remain in effect until (Termination date – month, day, year).



# CRCID

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The Agreement has been signed for CRCID and the Organization by their respective representatives, duly authorized.

**For The Organization**

\_\_\_\_\_  
Date (Month day, year)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

**For CRCID**

\_\_\_\_\_  
Date (Month day, year)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

## 1 Procurement and Disposal of Goods

Further to Section 13 of the General Terms and Conditions, the Organization shall be responsible and accountable for the procurement of goods directly related to the Program. Procurement and disposal of goods purchased under the Agreement shall be in accordance with the terms approved by CRCID through annual workplans during the term of this agreement.

## 2 Environmental Assessment

2.1 This Agreement may involve one or more projects which may constitute undertakings in relation to physical works within the meaning of the *Canadian Environmental Assessment Act*. The Organization and CRCID will cooperate to ensure that an assessment of the environmental effects of every such project (hereinafter « the environmental assessment ») will be carried out as early as practicable in the planning stages of the project once the essential details of the project become specified and before irrevocable decisions are made.

2.2 The Organization shall ensure that no part of the contribution referred to in the Articles of Agreement, article 2 will be used for the implementation of any project referred to in the above article until an environmental evaluation of every such project has been conducted by the Organization and the Organization has, in consultation with CRCID, determined that the project is not likely to cause significant adverse environmental effects.

2.3 CRCID shall comply with CIDA's « *Environmental Handbook for Community Development initiatives* » to ensure that the environmental assessment reports prepared for the Organization contain the appropriate level of detail.

2.4 The Organization has read and understood CRCID's Environmental Sustainability policy and procedures and will use its best efforts to comply. The Organization will inform CRCID of any environmental issues as soon as it becomes aware of the issue. The Organization and CRCID will collaborate on whether a full environmental assessment is required and mitigation measures should be undertaken.

2.5 The Organization shall ensure that any appropriate mitigation measures are implemented in order to avoid or reduce adverse environmental effects of projects.

2.6 The Organization shall provide CRCID, for the duration of this Contribution Agreement, all environmental assessments, including those related to projects or activities undertaken entirely or partially by a third party.

2.7 During the implementation of the Agreement and for five years following the last payment of the contribution, CRCID may monitor environmental practices of the Organization instituted under this agreement. Monitoring may be conducted by consulting documents and reports produced by the Organization and/or by visiting the Organization and the project sites in the field. CIDA may also perform environmental audits of the project.

## 3 Security

3.1 It is recommended that the Organization and its Canadian personnel read the contents of the latest report called «Travel Report» for Guatemala issued by the Department of Foreign Affairs and International Trade (DFAIT), in force on the effective date of this Contribution Agreement. These reports can be found at [www.maeci-dfait.gc.ca](http://www.maeci-dfait.gc.ca) (« *Travel Reports and Warnings*»). It is also recommended that before each trip of the Organization's Canadian personnel to Guatemala for the purpose of the Project, the Organization arrange a security briefing with the Canadian Embassy in Guatemala.

- 3.2 Upon issuance by DFAIT of any «Travel Report» or «Travel Bulletin» concerning the security situation regarding travel to Guatemala CIDA may issue, after consultation with DFAIT, a written notice **which could include the cancellation of the short-term assignment, the limitation of its activities, the suspension of Project activities or the evacuation of Project personnel.** This notice will be sent to CRCID that will immediately upon receipt forward the report to the Organization. It is understood that if the Organization or its Canadian personnel fail to comply with CIDA's written notice, the Organization and its Canadian personnel are deemed to act at their own expense. Within this context, only those CRCID advanced funds not committed or expensed on the project may be subject to refund to CRCID.

#### **4 Indemnifications**

The Club shall, both during and following the expiry or termination of the Agreement, save harmless and indemnify Her Majesty, her employees and her agents from and against all claims, losses, damages, costs and expenses or actions or other proceedings made against them in any manner, attributable to any injury, death, damage or loss of property arising or alleged to arise from the execution of the Program, except to the extent that the injury, death, damage or loss has been caused by the negligence of Her Majesty, her employees or agents.

#### **5 Public Recognition**

5.1 The Club shall mention CIDA's Contribution to the implementation of those projects within the Program covered by this agreement in its advertising, promotional announcements and activities, speeches, lectures, interviews, ceremonies and its web site.

5.2 CIDA and CRCID may compile and publish statistics based on information contained in the documents comprising the Agreement and arising from its performance. CRCID may publish the Organization's name and address, the amount of the Contribution, the type of activities funded, the title of the Program and the name of the recipient country.

#### **6 Status of the Organization and CRCID**

6.1 No provision in the Agreement creates or may create a joint venture, an association, or a partnership, mandate, representation or delegation between CRCID and the Organization.

6.2 The Organization shall not represent itself to third parties as the joint venturer, associate, partner, agent, representative or delegate of CIDA or the Government of Canada, and shall ensure that all its employees, representatives, delegates, agents, consultants or Subcontractors act accordingly.

6.3 CRCID agrees not to represent the (Program Name) Program as its own, but merely as a program that it co-funds in part. CRCID guarantees that it will not conduct business in the name of the (Name of the Program) Program without the express permission of the Organization. CRCID may use any of the templated information developed by and for use within the (Name of the Program) Program for purposes outside the management of this Agreement only when that use is sanctioned by the managers of the program.

#### **7 Dispute Resolution**

In the event that a dispute arises from or is related to the Agreement, the parties agree to attempt to resolve the dispute through negotiation or through another appropriate alternate dispute resolution process.

## **9 Anti-Corruption Clause**

The Organization declares and guarantees that no offer, gift or payment, consideration or benefit of any kind, which constitutes an illegal or corrupt practice, has been or will be made to anyone by the organization, either directly or indirectly, as an inducement or reward for the award or execution of the Agreement. Any such practice is grounds for terminating the Agreement or taking any other corrective action as required.

## 1 Description

### 1.1 Program description

The \_\_\_\_\_ (Name of Program) Business plan attached hereto constitutes the detailed description of the Program. Any aspects of the Program described therein that are being applied to projects funded by CRCID may only be revised substantively with prior CRCID approval.

### 1.2 CRCID funding is allocated towards the following sectoral program priorities:

- Sectoral Priority: e.g. Literacy and Education

### 1.3 The Organization agrees that the relevant sections of the Literacy and Education Performance Measurement Framework (PMF) as agreed upon by the Organization and CRCID and attached hereto will be used to measure the success of the Program.

## 2 General Responsibilities of the Organization

The Organization shall be responsible and accountable for the successful management and implementation of the Program. To this end, the Organization shall:

- 2.1 ensure a fair sharing of the financial risk between CRCID and the Organization by contributing, throughout the duration of the Program, its cost-sharing contribution to the Program as specified in the Articles of Agreement under Article 2 - Contributions of the Parties and in Part C under Paragraph 1.1;
- 2.2 manage the Program in accordance with CRCID's results-based principles;
- 2.3 select qualified and responsible co-operating organizations as its partner-organizations, as appropriate, and co-ordinate their efforts in planning, implementing, monitoring and evaluating all or a portion of the Program, and in preparing reports required by CRCID;
- 2.4 Encourage the full and complete participation of the project stakeholders in planning, implementing, monitoring and evaluating all aspects of the Program, and in preparing reports, and/or data, required by CRCID;
- 2.5 Facilitate CRCID's evaluation of the Program and shall request project stakeholders to do likewise;
- 2.6 Implement budgetary procedures and financial controls to enable the Organization to ensure sound management of the CRCID Contribution;
- 2.7 Ensure, if applicable, that it will provide the necessary allowances to trainees, on a needs-basis, according to the specifications in CIDA's *Management of Students and Trainees in Canada: Manual for Executing Agencies*, which can be found on CIDA's website at [www.acdi-cida.gc.ca](http://www.acdi-cida.gc.ca) (« Working with CIDA », « Doing Business », « Contracting », « Publications »). The Organization shall also ensure that receipts and vouchers are retained, for possible future audit, for all expenses claimed for trainees' expenses;
- 2.8 Ensure, if applicable, all eligible allowances claimed from CRCID are given to Canadian personnel on assignment in the field in accordance with CRCID's policies and not exceeding those stipulated in CIDA's *Technical Assistance Handbook*, which can be found at [www.acdi-cida.gc.ca](http://www.acdi-cida.gc.ca) (« Working with CIDA », « Doing Business », « Contracting », « Publications »);

- 2.9 Personnel working on the Program in a developing country will register with the Canadian Embassy or High Commission. The Organization will keep the respective Canadian Embassy or High Commission informed regarding the Program, including the participation of local collaborators. If assistance is needed, the Organization will advise the Canadian Embassy or High Commission well in advance of planned visits to the country with regard to the Program;
- 2.10 Avoid knowingly taking action that might jeopardize friendly relations between Canada and host countries;
- 2.11 Enter into the necessary agreements, as appropriate, with co-operating and partner organizations to facilitate the performance of this Agreement. Such agreements should outline mechanisms for Program implementation, define respective accountability, and include provisions for Program monitoring and auditing of financial records;
- 2.12 Ensure, to the best of its abilities, that the persons assigned to the implementation of the Program in host countries are physically capable of performing their duties, receive the necessary information prior to their departure to maintain their health, and have adequate health insurance coverage.
- 2.13 Indicate, in its plans and reports to CRCID, the expected impact of the Program on gender equality; the indicators used to measure results related to gender equality; the manner in which women were involved in the planning and implementation of development activities; any special measures undertaken to ensure full participation of women; and actual results related to gender equality according to CRCID's Gender Equality Policy approved October 2009;
- 2.14 Notify CRCID of the name of the individual appointed to maintain the record of activities undertaken by the Program during the period covered by this agreement. The records to be retained includes such material as:
- *decision records* as reflected in the minutes of the Canadian **(Name of Committee)** Program Committee
  - *reports* that the Program prepares which describe the context in which the Program is operating (e.g. education profiles, environmental reviews)
  - *evaluations* such as Program evaluations that might be referenced in reports to CRCID and project evaluations that might be included in trip reports
  - *financial records* including copies of invoices for material partially funded by the CRCID contribution
  - *Agreements* and related project descriptions

### 3. General Responsibilities of CRCID

CRCID shall be responsible and accountable for providing funding and support to the Program as laid out in this agreement. To this end, CRCID shall, among other things:

- 3.1 Provide a representative position, to be recommended by the Program's membership, on its committee advising upon CRCID's literacy, education and related policies
- 3.2 Advise the Program of such developments affecting the general delivery of foreign aid by Canadian NGOs that come to its attention

3.3 Facilitate, as appropriate, any initiatives by the Organization to coordinate with other CRCID-supported Programs operating in District 4250

3.4 Provide technical advice and support to the Program in such areas as ( but not limited to) environmental assessment, to the extent of its expertise and capacity, upon request of the Organization and its Program managers,

## 1 Other Sources of Funds for the Program

1.1 In addition to CRCID's Contribution, the Organization undertakes to contribute an amount of CAN \$XXXXXX in cash from its own funds and from other "Rotary in Canada" sources for the implementation of the Program.

1.2 The Organization certifies that the following funding has been obtained for the implementation of the Program prior to the signing of the Agreement:

Federal: \$0

Provincial: \$0

Municipal: \$0

Rotary in Canada:

Canadian Rotary clubs: \$ \_\_\_\_\_

Canadian Rotary Districts: \$ \_\_\_\_\_

**District** \$ \_\_\_\_\_

Other Districts \$ \_\_\_\_\_

Canadian Rotary Organizations: \$ \_\_\_\_\_

The Rotary Foundation: \$ \_\_\_\_\_

**Rotary in Canada Total:** \$ \_\_\_\_\_

**TOTAL:** \$ \_\_\_\_\_

1.3 The Organization declares and guarantees that all sources of proposed funding, with their corresponding amounts that will be matched by CRCID at the outset of this agreement, are presented in sections 6.1 and 6.2 above. The Organization shall update this declaration should there be changes during the implementation of the Program and shall indicate these changes in its Final Financial Report.

1.4 Without limiting the generality of section 33 of the CIDA General Terms and Conditions, where the Organization receives additional funding to that referred to in sections 1.1 and 1.2 above and indicated in all subsequent Advance Payment Requests submitted to CRCID during the term of this agreement, CRCID may, in consultation with the Organization,

a) reduce the Contribution by such amount as it considers appropriate, up to the amount of the additional funding received; or

b) if the Contribution has already been paid, require repayment of the advanced contribution not committed or expensed on the program as it considers appropriate.

1.5 The Organization shall repay all amounts claimed pursuant to paragraph 1.4 b) above, within the time specified in the notice requesting such repayments. The amounts that the Organization shall repay pursuant to paragraph 1.4 b) constitute debts to CRCID.

- 1.6 The Organization shall issue repayment cheques described in 1.4 b) to CRCID and forward them to the mailing address for CRCID.

## 2. Budget

- 2.1 The budget below constitutes the budget for the program:

**INSERT PROGRAM BUDGET**

- 2.2 The Organization shall ensure that prior approval from CRCID is obtained before exceeding line item amounts in the foregoing budget by more than ten percent (10%).
- 2.3 The adjustments allowed under this Section shall in no case exceed the total value of CRCID's contribution.

## 3. Annual Detailed Budget

A detailed budget must be submitted annually with the annual work plan, according to the schedule mentioned in Part E. This detailed budget is used as the basis of payment and must detail the cost elements described in Part D, presented for each component listed in the Program Budget.

## 1 Basis for Payment

For undertaking and implementing the Program activities, CRCID will pay its share of all actual and reasonable costs for the items specified within each component of the detailed annual budget presented with the Organization's annual work plan.

## 2 Eligible Cost Elements

2.1 Subject to the maximum set out in Government of Canada Treasury Board and policies, including the provisions of the *Technical Assistance Handbook*, and as applicable to the Program, the following costs may be reimbursed by :

2.1.1 Remuneration - Employees of the Organization: Daily remuneration rates applicable in Canada and abroad to employees of the Organization working on the implementation of the Program in accordance with the Agreement. Rates include:

- a) direct salaries: actual sums paid to employees of the Organization as regular salary excluding overtime pay and overtime bonuses and not exceeding the market rates for the specific type of service;
- b) fringe benefits, including:
  - paid absences: statutory holidays, annual vacation and sick leave, in accordance with the Organization's policies;
  - paid benefits: the employer's contribution to employment insurance and workers' compensation plans (where applicable), health and medical insurance, group life insurance, pension plans, in accordance with the Organization's policies;
  - discretionary fringe benefits shall not be accepted, unless preauthorized by CRCID;
- c) the daily remuneration rates calculated as per subparagraphs 2.1.1.a) and 2.1.1.b) shall be applied to the number of days worked, (including travel time overseas), based on a 7.5 hour calendar day, to a maximum of five (5) days of work per week in Canada, and up to a maximum of six (6) days per week elsewhere, as shown by time sheets and payroll register. Unless otherwise previously approved in writing by CRCID, an employee shall take at least one day off after 6 consecutive working days. Rates for working days of less than 7.5 hours shall be prorated based on hours worked. The daily remuneration rates shall be calculated as per the following formula:

$$\frac{\text{Annual direct salary} + \text{Annual fringe benefits}}{260}$$

2.1.2 Remuneration - Local Partner Organization(s): For Local Partner Organization(s) working on the implementation of the Program in accordance with this Agreement and which are specified as an integral part of the Program proposal, the actual salaries and actual fringe benefits paid to local professionals and local support staff, in accordance with local laws and practices and in accordance with the Local Partner Organization(s)' established salary scales and personnel policies.

2.1.3 Outside Consultants/Subcontractor Agreements

The actual cost of Subcontractors' fees (under contract with the Organization) be kept to a maximum of twenty percent (20%) of the total remuneration eligible under the Agreement ( in keeping with the spirit of the Policy on Transfer Payments, which stipulates that a contribution agreement may not generate profits). Individual rates shall not exceed the market rates that apply to the specific type of service.

- a) Canadian Outside Consultants: the actual per diem fee paid by the Organization to the Canadian Outside Consultant working on the implementation of the Program in accordance with this Agreement and in accordance with the following criteria:

The per diem fees paid to Canadian Outside Consultants shall be paid for each day spent directly on the performance of the activities described in this Agreement based on a seven and one-half (7.5) hour calendar day, to a maximum of five (5) days per week in Canada, and up to a maximum of six (6) days per week elsewhere, unless previously authorized by CIDA. The Organization shall pay the Canadian Outside Consultant for time actually worked. The rate for less than one (1) day shall be calculated by dividing the per diem fee by seven and a half (7.5) hours and multiplying the result by the number of hours actually worked during the day.

In non-competitive situations, the Organization must ensure that the actual per diem fee for Canadian Outside Consultants has been determined in accordance with CIDA's policy on the determination of fees on non-competitive service contracts and that it is fair and reasonable based upon relevant level of expertise and complexity of the mandate.

- b) Local Outside Consultants: For local outside consultants in accordance with this Agreement, CRCID will pay the actual daily per diem fee paid by the Organization to the Local Outside Consultant. The per diem fee shall be in accordance with local market rates for similar services and in accordance with local labour laws.

The Organization shall pay the local outside consultant for time actually worked. The rate for less than one (1) day shall be calculated by dividing the per diem fee by seven and a half (7.5) hours and multiplying the result by the number of hours worked during the day.

- 2.1.4 Salary Increases: The salaries paid by the Organization to its personnel and other salaried personnel to this Agreement may be increased in accordance with the collective agreements or labour contracts in place, provided that the increases are deemed reasonable as determined by CRCID and in accordance with labour market conditions. Any other salary increases shall be in accordance with «CIDA's Policy on Annual Fee and Salary increases under Multi-Year Service Contracts and Contribution Agreements». This policy can be found on CIDA's website at [www.acdi-cida.gc.ca](http://www.acdi-cida.gc.ca) (« Working with CIDA », « Doing Business », « Contracting », « Publications »). The Organization shall identify expected salary increases, if any, in its annual workplan.

- 2.1.5 Reimbursable Travel Expenses: The actual and reasonable travel expenses directly related to the implementation of the Program, in accordance with the Travel Policy provisions of the Treasury Board Travel Directive (the Directive) and the Special Travel Authorities, which take precedence over the Directive:

- a) the cost of commercial transportation based on the most reasonable available fares, using the most direct routing where appropriate and, whenever possible, the services of Canadian carriers. The Consultant/the Organization shall endeavour to obtain the lowest possible airfare, such as by booking the reservation as soon as possible. The standard for air travel is economy class, including APEX, charters and other reduced or discounted fares. CRCID will reimburse the Consultant/the Organization the lowest airfare available at the time of reservation, but never more than the maximum of a full-fare economy airfare. CRCID will limit the reimbursement of plane tickets to the most reasonable fare available at the time of reservation even when the Consultant/the Organization chooses not to use this fare. The Consultant/the Organization must be able to provide with invoices showing the travel arrangements deemed satisfactory to CRCID. The cost of necessary changes or cancellations to flights is considered a legitimate reimbursable expense of the project and the

circumstances surrounding these changes shall be documented in the Consultant/the Organization's program file;

- b) the cost of meals, incidentals and private vehicle usage, in accordance with the meal, incidental, and private vehicle allowances specified in Appendices B, C and D of the Directive, which can be found at the following website: **[http://www.tbs-sct.gc.ca/pubs\\_pol/hrpubs/TBM\\_113/td-dv\\_e.asp](http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/TBM_113/td-dv_e.asp)**
- c) the actual cost of registration, photographs, and courier services related to obtaining a visa;
- d) the actual and reasonable cost of a single room in commercial accommodation or, when private non-commercial accommodation is used, the rate for such accommodation, in accordance with the provisions of clause 7.8 of the Special Travel Authorities and Appendix D of the Directive;
- e) all other actual and reasonable costs deemed legitimate project expenses, in accordance with the provisions of the Directive referring to "travellers" rather than to "employees";
- f) a daily allowance equivalent to the per diem fee specified in paragraph 2.1.1 for each day in travel status. The number of days allowed for travelling shall be determined and approved by CRCID on the basis of the points of origin and destination.

2.1.6 Other Reimbursable Expenses: As applicable, the actual and reasonable expenses directly related to the implementation of the Project, such as;

- a) benefits and allowable expenses for Personnel on long-term field assignment and Personnel on short-term relocation, in accordance with the Organization's policies but not exceeding those stipulated in CIDA's *Technical Assistance Handbook*;
- b) allowances paid to award students and trainees, in accordance with CIDA's *Management of Students and Trainees in Canada: Manual for Executing Agencies*;
- c) expenses incurred by counterpart Personnel of the recipient country, who have been identified by the recipient country to either receive training or work with Personnel, such as local transportation costs and living expenses while travelling for the purpose of the Program.
- d) costs arising from the purchase, rental, maintenance and transportation of goods, equipment, vehicles and supplies in accordance with the Organization's policies, provided such costs fall within the parameters stipulated in section 13 of the General Terms and Conditions and are eligible for the application of the overhead rate as per the *Overhead Compensation Policy for CIDA's Contribution Agreement*;
- e) long distance communication, mail and courier costs;
- f) translation and word processing costs, printing and production costs associated with Program reporting and production of reading material and related publicity;
- g) overseas costs such as rent, leasehold improvements, utilities, office expenses, office computer and general maintenance;
- h) bank transfer fees; and
- i) any other expenses required to implement the Program, which are not included in the above categories but have received CRCID's prior written approval and are eligible for the application of the overhead rate as per the *Overhead Compensation Policy for CIDA's Contribution Agreement*. This publication can be obtained from s website at [www.acdi-cida.gc.ca](http://www.acdi-cida.gc.ca) (« *Working with CIDA* », « *Doing Business* », « *Contracting* », « *Publications* »).

2.1.7 Overhead costs: The following will also be considered as eligible costs:

- a) a rate of ten percent (10%) of CRCID's contribution towards "Program Management Expense" payable to CRCID upon receipt of each advance payment received;
- b) c) flow-through funds, bulk purchases of goods, capital expenditures and construction costs; and any other expenses required to implement the Program, which are not included in the above categories but have received CRCID's prior written approval and are not eligible for the application of the overhead rate as per the *Overhead Compensation Policy for CIDA's Contribution Agreement*.

2.2 The Organization shall not include profit, directly or indirectly, in the calculation of remuneration or in any other of the costs detailed in Part C of the Specific Terms and Conditions, except, subject to subparagraph 2.1.3 of this Part, when the profit is included in an acceptable Subcontractor agreement with a for-profit entity into which the Organization does not hold any direct or indirect interest.

2.3 The Organization shall ensure that all costs for the implementation of the Program include, where applicable, the GST, HST and provincial sales tax that the Organization shall pay on all goods and services, less any credits or reimbursements to which it is entitled.

2.4 The Organization, for audit purposes, shall safekeep for at least 3 years following the final payment of the Contribution Agreement, all supporting documentation of costs reimbursed by CRCID.

### 3 Method of Payment

For the performance of the Program, to CRCID's satisfaction, and the fulfilment of all the Organization's other obligations pursuant to the Contribution Agreement, CIDA agrees to finance the Organization's expenses as follows:

- 3.1 CRCID shall provide advance payments in accordance to the schedule described in Part E - Table 2, and the payments will be based on the approved Program Budget as described in Part C, as updated in the detailed annual budget, the approved annual workplan and on approved quarterly cash flow requirements. Quarterly periods begin with the months of April, July, October and January.
- 3.2 After signature of the Agreement by the requisite signing authorities acceptance by CRCID of the annual workplan and receipt of a request from the Organization for an advance payment, will provide a first advance payment to the Organization, based on the approved cash flow forecast.
- 3.3 CRCID shall approve subsequent advance payments to the Organization on a **semi-annual** basis upon receipt of a signed « Advance Payment Request ». These advance payments are subject to the availability of CRCID Developing Country Program funds as advanced by CIDA and receipt of satisfactory financial and narrative reporting documents.
- 3.4 Upon approval of the « Advance Payment Request », CRCID shall issue a payment in Canadian dollars to the Organization. This payment will be sent to the Organization by regular mail to the address indicated under section 4.2 of the Articles of Agreement or deposited directly into the Organization's bank account if so requested by the Organization.
- 3.5 The Organization shall account for the disbursements against funds received by providing financial reports acceptable to CRCID on the utilization of the funds as outlined in Part E « Reporting Requirements ».
- 3.6 All advance payments must be accounted for within six (6) months of the end of the period covered by the advance payment. No funds can be advanced or paid until such time as the past due accounting has been received.

3.7 Upon submission of the End-of-Program Report in accordance with the schedule of reports presented in Part E - Table 1, the Organization shall return to CRCID any funds contributed by CRCID under this Agreement which are not disbursed or accounted for.

4 The present Agreement does not imply that CRCID will fund any continuation of this Program.

## 5 Advance Payment Request, Address and Coding.....

All statements, requests for advance payments and other documentation submitted by the Organization shall be sent to CRCID at the following address and shall indicate the following codes, and shall be accompanied by such information as may be reasonably requested by CRCID:

Canadian Rotary Collaboration for International Development  
1579 Hyde Park Road,  
London, ON, Canada N6H 5L4  
Attention: Program Officer

Program Title: The [REDACTED] Program  
Program Number: CRCID #

## 6 CRCID Notification of Non-Acceptance of an Advance Payment Request

6.1 CRCID may alter the amount of an advance payment, from the amount requested, in discussion with the Organization.

6.2 Within fifteen (15) days of receipt of the « Advance Payment Request » required above, CRCID shall notify the Organization in writing when:

- a) there are errors or omissions in the documentation;
- b) the Organization is not conforming to the terms of the Contribution Agreement;
- c) the amount requested by the Organization appears to exceed the actual value of the planned activities;
- d) any combination of the situations described above or any other viable reasons.

6.3 Any fees or expenses, referred to above, incurred by the Organization which are the subject of notification shall be excluded for the purposes of advance payments until the said fees or expenses have been accepted by CRCID.

## 7 Budget Revisions

The annual detailed budget may be revised, subject to CRCID's approval, over the course of the Program to reflect adjustment in cash-flow requirements, as communicated to CRCID by the Organization.

## 8 Accounting for Interest Earned on Advances

The Organization shall maintain the funds received in an interest-bearing bank account for the specific purpose of depositing advances made by CRCID under the Agreement. Any accumulated interest shall be credited to the account and reported as a part of CRCID's contribution in its financial reports. The Organization shall use the accumulated interest exclusively for the purposes set forth in Part C of the Specific Terms and Conditions of this Agreement.

## 9 Retroactivity

CRCID funds contributed within this Agreement must be used to finance Program activities between the date this Agreement enters in force and the termination date of the agreement as indicated herein.

## **9. Shared Financial Risk**

In order to ensure a fair sharing of the financial risk between CRCID and the Organization, the Organization shall, throughout the duration of the Program, contribute its portion towards the execution of the Program.

## **10. Regions and Countries**

CRCID funds can only be used for beneficiaries in countries and territories to receive Canadian official development assistance (ODA). The lists of countries and territories for Canadian ODA are updated regularly and published on CIDA's website at [www.acdi-cida.gc.ca](http://www.acdi-cida.gc.ca) (« *Regions and Countries* »)

The following documents/reports shall be submitted to CRCID according to the schedule presented in Part E, Table 1, and shall be in a form agreed to by CRCID and the Organization and in accordance with the principles presented on CIDA's website at [www.acdi-cida.gc.ca](http://www.acdi-cida.gc.ca) (« *About CIDA* », « *Performance* », « *Results-based Management* »).

## 1 Reporting

- 1.1 The Organization shall submit to the CRCID Program Officer all related information required for the Program Officer to draft the **narrative progress** reports described below.
- 1.2 The CRCID Program Officer will send the draft **narrative progress** report, in the manner stipulated herein with respect to the standards established for the content and format to the Organization for its review and approval.
- 1.3 The Organization shall submit, for CRCID's review and approval, one (1) copy of the narrative and financial progress reports described below, in the manner stipulated herein with respect to the standards established for the content and format.
- 1.4 These reports may be submitted to CRCID by electronic mail, fax, courier services or regular mail.
- 1.5 These reports shall be prepared in the language of the Agreement.
- 1.6 When facilities so permit, the Organization shall produce all documents, reports, etc. in double-sided format using recycled paper.

## 2 Audited Financial Documents

The Organization shall submit to CRCID upon request by CRCID and within a reasonable length of time mutually agreed upon by CRCID and the Organization:

- 2.1 Annual auditable financial statements; and
- 2.2 Auditable financial schedules, in a format acceptable to CRCID, providing details on certain line items of the auditable financial statements, as requested by CRCID. The financial schedule template and related guidelines will be provided by CRCID to the Organization.

## 3 Annual Work Plan

The annual work plan should identify and describe what the Organization and its partners can reasonably expect to accomplish in the given period toward meeting Program objectives and the program expenditures of the planned activities. The annual work plan will contain the following:

- a) the planned objectives, expected outputs/outcomes and results, as well as performance indicators for the Program and Projects;
- b) major/significant events, missions, annual meetings...;
- c) a planned list of overseas partners' names and addresses;
- d) a list of equipment and materials to be purchased with CRCID's contribution;
- e) a projected budget for the period covered by the workplan;
- f) bi-annual cash flow forecasts for the period covered.

## 4 Semi-Annual Progress Report

The Organization shall submit a Semi-Annual Progress Report. The Organization shall report actual Program results achieved against expected outputs and outcomes as detailed in the annual workplan. The Organization will also include individual program progress/performance reports for the same period. The Organization may also attach brief additional contextual information relevant to the overall Program. The Semi-Annual Progress Report as well as the individual program progress/performance reports are used by the Organization and CRCID for program management and monitoring purposes.

## 5 Annual Progress Report (narrative and financial)

- 5.1 The Organization shall report on actual Program results achieved against expected outputs and outcomes as detailed in the annual workplan. The Organization will also include individual program progress/performance reports for the same period. The Organization may also attach additional contextual information relevant to the overall Program. The narrative portion of the Annual Progress Report shall also include the actual results related to gender equality as well as a list of goods purchased with CRCID's contribution with information on their disposal, if applicable. The Annual Progress Report as well as the individual program progress/performance reports are used by the Organization and CRCID for Program management and monitoring purposes.
- 5.2 The financial portion of this Report, which shall be presented in the same format as the approved annual detailed budget, will contain the following information:

**5.2.1 CRCID's Contribution**

- a) initial Program budget;
- b) revised budget (when annual detailed budgets are presented);
- c) previous years cumulative expenses;
- d) annual budget for the reporting period;
- e) actual expenditures for the reporting period;
- f) annual forecasts for each remaining year;
- g) an explanation of any significant variance of actual versus forecast expenditures (for the reporting year).

**5.2.2 The Organization's Contribution**

- a) Organization's contribution to the cost-sharing initially planned;
- b) previous years cumulative contributions;
- c) forecasted contribution for the reporting period;
- d) actual contributions for the reporting period;
- e) annual forecasts for each remaining year.

**6 Quarterly Financial Report**

This report, which shall be presented in the same format as the approved annual detailed budget, will describe actual expenses incurred against the original budget. The Quarterly Financial Report will contain, but not be limited to the following:

**6.1 CRCID's Contribution:**

- a) annual detailed budget for the current fiscal year;
- b) expenditures for the previous quarters;
- c) forecast for the reporting quarter;
- d) actual expenses for the reporting quarter;
- e) an explanation of any significant variance of actual versus forecast expenditures (for the reporting quarter);
- f) amount available for the remaining quarters.

## 6.2 The Organization's Contribution

- a) the Organization's cost-share contribution fiscal year to date;
- b) the Organization's cost-share contribution for the reporting quarter;
- c) the Organization's cost-share contribution anticipated for the remaining quarters.

## 7 End-of-Program Report

The Organization will submit an End-of-Program Report that will provide a narrative and financial overview of the entire Program. The content and format of this report shall include, but not necessarily be limited to the following:

- a) an executive summary;
- b) a summary of Program activities, outputs/outcomes, and expected results;
- c) a description of progress achieved and results of the Program, including any unanticipated achievements;
- d) an explanation of significant variances between outputs/outcomes planned and achieved;
- e) comments on the main risks identified in Program planning and encountered during Program implementation, and on the strategies to manage these risks;
- f) an analysis of gender equality issues and results in the Program overseas;
- g) an assessment of environmental results, if required as per the terms of this Agreement;
- h) a list of goods purchased for the Program with information on their disposal, if applicable;
- i) if applicable, a description of each of the intellectual property rights subject-matters created under the Agreement, a designation of the persons licensed or to be licensed in the territory in which the program is executed, a description of the copies of subject-matters to be delivered to such persons and those to be delivered to CIDA, an identification of the holders of rights in subject-matters created under or outside the Agreement and serving as components or complements thereof, and contact information (names and addresses) for these holders;
- j) a description of public engagement activities along with an explanation as to how these activities contributed to public awareness and understanding of international development issues, if applicable;
- k) a description of progress achieved following the recommendations of the Program evaluation conducted by CRCID;
- l) shared responsibility and accountability for results on the part of the Organization's partners;
- m) sustainability of results beyond the life of the Program;
- n) an outline and analysis of the main lessons learned in the process of Program implementation;
- o) the approved Program Budget and the actual final budget, by item and by fiscal year;
- p) an updated declaration on all sources of funding being matched by CRCID over the term of this agreement for the Program, and an updated declaration on any overdue amounts owing to CRCID;
- q) recommendations to CRCID with regard to any other item at the Organization's discretion.

## 8 Advance Payment Request

The Organization is asked to complete the form entitled « Advance Payment Request » and to submit it to CRCID when requesting payments. This form will be provided by CRCID to the Organization.

## 9 Special Reports

The Organization shall submit to CRCID, on an ad hoc basis, any reasonable reports (such as briefing material, financial reconciliation reports, etc.) as requested by CIDA through CRCID. All costs for such reports will be fully born by the requesting agency.

## 10 Technical Cooperation Reports – Technical Cooperation Data Unit (TCDU)

- 10.1 As applicable, where the objective of the Project/Program, or one of its components is to build technical capacities/expertise (and thus involves a transfer of knowledge), the Project/Program then includes a technical cooperation component benefiting the population of the recipient

country. In that case, the Organization must complete a technical cooperation report for each calendar year in which the Project/Program is operational. Unlike other CIDA reports, this report deals specifically with the technical cooperation aspects of the Project/Program.

- a) The CRCID representative will notify the Organization by e-mail, providing the necessary information as well as a website address so that the Organization can access the site, and asking the Organization to complete its report online.
- b) The Organization's representative must then log in to the TCDU site, if he/she does not already have access to another CIDA site, and can access his/her Project/Program(s) to complete the report(s).
- c) The technical cooperation report contains seven sections:
  - Section 1: Project/Program Identification and Description of the Activities
  - Section 2: Contact Information for the Project/Program
  - Sections 3 and 4: Information on Students and/or Trainees (Single Entries and Group Entries)
  - Section 5: Information on Technical Cooperation Personnel (Experts)
  - Section 6: Information on Other Costs
  - Section 7: Summary of All Report Activities
- d) The Organization must submit the duly completed electronic report to CIDA by January 31st of each calendar year, via the TCDU site. The completed report is thus sent electronically.

You may reach the Technical Cooperation Data Unit (TCDU) at:

TDCU website: <http://udct-tcd�.acdi-cida.gc.ca>

Infoline: 1-877-823-8328

E-mail: [udct.tcd�@acdi-cida.gc.ca](mailto:udct.tcd�@acdi-cida.gc.ca)

# Contribution Agreement

# Part E

Specific Terms and Conditions  
Reporting Requirements

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**TABLE 1 - SCHEDULE OF REPORTS**

The Organization shall provide CRCID with the following reporting documents in accordance with the schedule indicated below:

<b>REPORT</b>	<b>FREQUENCY</b>	<b>DUE DATE</b>	<b>PERIOD COVERED</b>
<b>Program Performance Report or Investment Management and Reporting Tools</b>	Annually	April-May, when requested by CRCID	Previous fiscal year
<b>Auditable Financial Statements</b>	Annually	Within 6 months of the Organization's fiscal year-end	Organization's fiscal year.
<b>Annual Workplan</b>	Annually		New fiscal year (April to March)
<b>Semi-annual Progress Report</b>	Once a year		
<b>Annual Progress Report (Narrative &amp; Financial)</b>	Annually		
<b>Financial Report</b>		Six (6) months of the end of the period covered by the advance payment	
<b>End of Program Report</b>	Once	90 days following end of Program	Duration of the Program
<b>Technical Cooperation Report</b>	Annually	January 31	January to December (previous calendar year)
<b>Special Reports</b>	When agreed upon as requested by CIDA		

# Contribution Agreement

# Part E

Specific Terms and Conditions  
Reporting Requirements

**TABLE 2 - ADVANCE PAYMENT SCHEDULE**

CRCID shall provide quarterly advance payments to the Organization in accordance with the following schedule, which reflects the approved cash-flow requirements of the Program. The schedule of advance payments may be revised over the course of the Program to reflect adjustment in cash-flow requirements, as communicated to CRCID by the Organization.

It is understood that release of advance payments will be contingent upon receipt by CRCID of satisfactory financial and, when required, narrative reporting documents as outlined in Part E - Table 1.

NO	DATE PLANNED	PLANNED AMOUNT	PERIOD COVERED	COMMENTS
1st				After signature of the Agreement, approved annual workplan and receipt of an advance payment request, as per Part D - Method of payment sub-article 3.2
2nd				
3rd				
4th				
* Year 2				
* Year 3				
* Year 4				
* Year 5				
<b>Total</b>		\$0		

The advance payment schedule will be updated at the beginning of each fiscal year (or more frequently, if deemed appropriate) to reflect the revised Program cash-flow projections.

**Note: For each payment, an « Advance Payment Request » is required.**

## Appendix 2



# CRCID

Canadian Rotary Collaboration for  
International Development

7-1615 North Routledge Park – London, ON – N6H 5L4  
Phone: (519) 473-2100 – Fax: (519) 471-8982  
Email: rotary@crqid.org - Website: www.crqid.org



## Interim Narrative Monitoring Report Form

*Due: input due date*

**Name of Program:** \_\_\_\_\_

The purpose of the narrative report is to provide the programs with an opportunity to include additional information not provided in the RBM Reporting Matrix about their program during the reporting period that they might wish to be included in the next CRCID's narrative report to CIDA.

**Date of Report:** \_\_\_\_\_ **Reporting Period:** \_\_\_\_\_

**Prepared By:** \_\_\_\_\_

**1. What products and services have been used or produced during the reporting period (*input reporting period dates*) ?**

*(RBM Terminology: Short-Term Outputs)*

•

**2. What numerical measures of success has your program accomplished since program start input date.**

*(RBM Terminology: Output Indicators)*

•

**3. What steps did your program take in order to accomplish questions 1 & 2?**

*(RBM Terminology: Activities)*

•

**4. Who are the direct beneficiaries of your program to date (since *input date*)? How many?**

•

**5. Who are the indirect beneficiaries of your program to date (since *input date*)? How many?**

•

**6. What were the challenges (if any) the program was faced with over the past reporting period (since *input date*)? What actions were taken to alleviate the situation?**

Box expands automatically...

**7. What steps have you taken to ensure that the program can sustain itself upon the completion of the program? (RBM Terminology: Sustainability)**

Box expands automatically...

**8. Gender**

- a. Has anyone approached the men/boys in the community to ask if this program will interfere in their daily routines?

Yes

No

- b. Has anyone approached the women/girls in the community to ask if this program will interfere in their daily routines?

Yes

No

If yes has been checked in the above questions please describe the results of the conversations

Box expands automatically...

- c. Have both men and women been included in the planning and management of this program?

Yes

No

- d. Do both men and women benefit from this project?

Yes

No

Please describe the details of 8c and 8d

Box expands automatically...

- e. Can both men and women take advantage of the benefits that the program offers?

Yes

No

Who could potentially utilize your program? (*who would be allowed or not allowed to utilize what the program offers?*) Please segregate answers by sex.

Box expands automatically...

**9. Environmental**

- a. Please describe any direct impacts the program may have had on the natural environment (positive or negative) since **input date (last reporting date)**. Eg: diverting waste products from a water source

Box expands automatically...

- b. Please describe any indirect impacts the program may have on the natural environment (positive or negative) since **input date**. Eg: *environmental education for children*

Box expands automatically...

- c. Please describe any **unexpected** impacts on the natural environment that were experienced since **input date**.

Box expands automatically...

- d. Please describe any efforts to mitigate negative impacts on the natural environment and / or efforts to increase positive impacts on the natural environment since **input date**.

Box expands automatically...

10. Please describe any **Public Engagement Campaigns** or media relations that have promoted your program:

Was CRCID and/or CIDA included as a stakeholder in this publicity?

Box expands automatically...

11. **Additional Comments:** This may include success stories and quotes from beneficiaries

Box expands automatically...

## Appendix 3

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# CRCID



## Canadian Rotary Collaboration for International Development

1615 North Routledge Park #7 – London, ON – N6H 5L4  
Phone: (519) 473-2100 – Fax: (519) 471-8982  
Email: rotary@crcid.org - Website: www.crcid.org



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## CRCID FINANCIAL REPORT

<b>REPORT PREPARED BY:</b>	
<b>CRCID AMOUNT ADVANCED TO BE REPORTED ON:</b>	\$
<b>DATE OF REPORT:</b>	

### REPORT INSTRUCTIONS:

- **INVOICES** and or **RECEIPTS** for **all expenses** over \$500 need to be attached to the report as back up documentation for the auditor.
- Report should include **CRCID funding** as well as **Canadian Rotary funds** (Rotary in Canada Contributions such as; Club, District, TRF Matching, Rotary Action Groups).
- Reports are to be submitted by the Canadian Contact on behalf of the Club or District indicated in the CRCID Agreement.
- Reports are to be sent to CRCID for each advance **before the next advance is sent** and / or every 6 months, or as requested by CRCID.
- To insert columns in the tables below simply right click and insert column.
- Copies of reports being submitted to The Rotary Foundation must be submitted to CRCID as an addendum to your CRCID report.

*If contact information for either the Canadian program coordinator or host program coordinator has changed, please indicate changes below:*

N/A
-----

<b>President</b> Peter Peters	<b>Chairman</b> Monty Audenart	<b>Executive Director</b> John Eberhard	<b>C.A.O.</b> Kevin Webb

**FUNDRAISING**

Please list all funding received by the program

<b>Funding Donor</b>	<b>Name /Number/ Description</b> <small>(i.e. Club Name, District #, Grant #).</small>	<b>Dollar Amount (USD)</b>	<b>Dollar Amount (CAD)</b>
Canadian Rotary Club(s):			\$
Canadian Rotary District(s) (DDF):			\$
The Rotary Foundation			\$
International Country Rotary Club(s):			\$
International Country Rotary District(s) (DDF):			\$
Other Rotary Partner(s):			\$
a.			\$
b.			\$
c.			\$
Other non-Rotary Partner(s):			
a.			\$
b.			\$
c.			\$
<b>TOTAL:</b>			\$

*Please see pg 3 for Expense Form*

<i><b>President</b></i> Peter Peters	<i><b>Chairman</b></i> Monty Audenart	<i><b>Executive Director</b></i> John Eberhard	<i><b>C.A.O.</b></i> Kevin Webb

**Program Expenses**

All items that have been expensed big and small should be listed.

<b>Exchange Rate from Local Currency to USD</b>					
<b>Exchange Rate from USD to CAD</b>					
Please use the Exchange Rate found in your Agreement with CRCID					
<b>Invoice Attached</b>	<b>Budget Item</b>	<b>Description (if necessary)</b>	<b>Cost of Item (Local Currency)</b>	<b>Cost of Item USD</b>	<b>Cost of Item CAD</b>
<i>yes</i>	<i>Example: Uniforms</i>	<i>200 school uniforms</i>	<i>xxx</i>		<i>xxx</i>

*(Left click in the table to add more rows if necessary).*

<i><b>President</b></i> Peter Peters	<i><b>Chairman</b></i> Monty Audenart	<i><b>Executive Director</b></i> John Eberhard	<i><b>C.A.O.</b></i> Kevin Webb



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Club President

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Program Coordinator

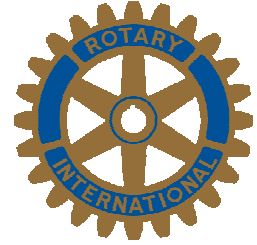
*(Canadian Signing Club in CRCID Agreement)*

<b><i>President</i></b> Peter Peters	<b><i>Chairman</i></b> Monty Audenart	<b><i>Executive Director</i></b> John Eberhard	<b><i>C.A.O.</i></b> Kevin Webb



## Canadian Rotary Collaboration for International Development

7-1615 North Routledge Park, London ON N6H 5L6  
Phone: (519) 473-2100 – Fax: (519) 471-8982  
Email: rotary@rcid.org - Website: www.rcid.org



*Supported by the Canadian International Development Agency (CIDA) and participating Rotary Clubs*

## CRCID Final Financial Reporting Form

Revised: April 2011

for CRCID  
Program/Project #: \_\_\_\_\_

### *Instructions:*

- Reports are to be submitted by the Canadian Program Coordinator or Project Contact on behalf of the Club or District indicated in the CRCID Program Agreement or Letter of Agreement.
- Reports are to be sent to CRCID every quarter as indicated in the CRCID Program Agreement, from the effective date of the contract, *whether or not CRCID funding has been disbursed*. The CRCID Policy Manual contains detailed requirements regarding reporting to CRCID and should be read and understood by all participants.
- This document will expand as required. If you are not using this computer document to submit your report, please attach your narrative responses in a separate document, with all headings, in order to fully communicate all of the information that you need and wish to include.
- Copies of reports being submitted to The Rotary Foundation may be submitted as an addendum to your CRCID report. The CRCID report forms must be submitted by the Canadian Program Coordinator to be considered acceptable and complete.

Report prepared by: \_\_\_\_\_

Report for the period: \_\_\_\_\_

*If contact information for either the Canadian program coordinator or host program coordinator has changed, please indicate changes below:*

***President***  
Peter Peters

***Chairman***  
Monty Audenart

***C.A.O.***  
Kevin J. Webb

**Program inputs (resources):**

List the physical, monetary and non-monetary resources used to date. Refer back to the contributors and expenses listed in your CRCID Program Agreement.

<b>TOTAL SOURCE OF FUNDS RECEIVED</b>		
Rotary Club	CAN	\$
District DDF SHARE Funds	CAN	\$
Host Rotary Club	CAN	\$
Host District SHARE Funds	CAN	\$
The Rotary Foundation	CAN	\$
Other: _____	CAN	
CRCID/CIDA [Net]*	CAN	\$
<b>TOTALS</b>	<b>CAN</b>	<b>\$</b>
U.S. → Canada Exchange Rate =		
<b>EXPENSES (attach invoices not previously submitted)</b>		
	CAN	
	CAN	
	CAN	
	CAN	
	CAN	
	CAN	
	CAN	
	CAN	
	CAN	
	CAN	
	CAN	
<b>TOTALS</b>	<b>CAN</b>	<b>\$ 0.00</b>
<b>SURPLUS/DEFICIT</b>	<b>CAN</b>	

- If there is a surplus, you must return this amount to CRCID with this report.
- If you are including invoices, please attach a cover sheet detailing the invoices, including:
  - The date, supplier, invoice number, or other identifying information for each invoice

- The amount of each invoice in the local currency
- The total amount of all paid invoices in local currency
- The equivalent total in U.S. and Canadian currencies, using the [current RI exchange rate](#)
- Reference back to the CRCID Program Agreement, indicating what listed items have been purchased and which are still remaining

**Additional comments**

## Appendix 4

## CRCID SECTORAL PRIORITIES

1. Primary Health Care (101)			
Sector Code	Description	Definition	Est. %
12181	Medical education / training	<ul style="list-style-type: none"> <li>• Medical education and training for tertiary level services</li> </ul>	10%
12191	Medical services	<ul style="list-style-type: none"> <li>• Laboratories, specialized clinics and hospitals (including equipment and supplies);</li> <li>• Dental services;</li> <li>• Mental health care;</li> <li>• Medical rehabilitation;</li> <li>• Control of non-infectious diseases;</li> <li>• Drug and substance abuse control (excluding narcotics traffic control).</li> </ul>	10%
12220	Basic health care	<ul style="list-style-type: none"> <li>• Primary health care programs;</li> <li>• Paramedical and nursing care programs;</li> <li>• Supply of drugs, medicines and vaccines related to basic health care.</li> </ul>	10%
12230	Basic health infrastructure	<ul style="list-style-type: none"> <li>• District-level hospitals, clinics and dispensaries and related medical equipment.</li> </ul>	10%
12240	Nutrition	<ul style="list-style-type: none"> <li>• Direct feeding programs (maternal feeding, breast feeding and weaning foods, child feeding, school feeding);</li> <li>• Determination of micro-nutrient deficiencies;</li> <li>• Provision of vitamin A, iodine, iron, etc.;</li> <li>• Monitoring of nutritional status;</li> <li>• Nutrition and food hygiene education;</li> <li>• Household food security.</li> </ul>	10%
12250	Infectious disease control	<ul style="list-style-type: none"> <li>• Immunization;</li> <li>• Prevention and control of malaria, tuberculosis, diarrheal diseases, vector-borne diseases (e.g. river blindness and guinea worm), etc.</li> </ul>	5%
12281	Health Education	<ul style="list-style-type: none"> <li>• Information, education and training of the population for improving health knowledge and practices;</li> <li>• Public health and awareness campaigns.</li> </ul>	15%
12282	Health personnel development	<ul style="list-style-type: none"> <li>• Training of health staff for basic health care services.</li> </ul>	15%
16310	Social/welfare services	<ul style="list-style-type: none"> <li>• Special programs for the elderly, orphans, the disabled, street children.</li> </ul>	5%
24040	Informal/semi-formal financial institutions	<ul style="list-style-type: none"> <li>• Micro credit, savings and credit co-operatives etc...</li> </ul>	10%
<b>Total:</b>			<b>100%</b>

## CRCID SECTORAL PRIORITIES

2. Basic Education (102)			
Sector Code	Description	Definition	Est. %
11120	Education facilities and training	<ul style="list-style-type: none"> <li>• Education buildings, equipment, materials;</li> <li>• Subsidiary services to education (boarding facilities, staff housing);</li> <li>• Language training;</li> <li>• Seminars, lectures, etc.</li> </ul>	20%
11220	Primary education	<ul style="list-style-type: none"> <li>• All elementary and first cycle, systematic instruction;</li> <li>• Provision of learning materials.</li> </ul>	10%
11230	Non-formal education	<ul style="list-style-type: none"> <li>• Literacy and numeracy training;</li> <li>• Education for basic life skills for both adults and children.</li> </ul>	40%
11330	Vocational training	<ul style="list-style-type: none"> <li>• Elementary vocational training and secondary level technical education;</li> <li>• On-the-job training;</li> <li>• Apprenticeships;</li> <li>• Informal vocational training.</li> </ul>	20%
32140	Cottage industries and handicraft		10%
<b>Total:</b>			<b>100%</b>

3. Water Management (106)			
Sector Code	Description	Definition	Est. %
14030	Low cost water and sanitation	<ul style="list-style-type: none"> <li>• Water supply and sanitation through low-cost technologies such as hand pumps, gravity-fed systems, rain water collection, latrines</li> </ul>	65%
16220	Low-cost housing	<ul style="list-style-type: none"> <li>• Housing sector policy, planning and program aid including slum clearance</li> </ul>	5%
31130	Agricultural land resources	<ul style="list-style-type: none"> <li>• Including soil degradation control;</li> <li>• Soil improvement;</li> <li>• Drainage of waterlogged areas;</li> <li>• Soil desalination;</li> <li>• Agricultural land surveys;</li> </ul>	5%

## CRCID SECTORAL PRIORITIES

		<ul style="list-style-type: none"> <li>• Land reclamation;</li> <li>• Erosion control;</li> <li>• Desertification control.</li> </ul>	
31140	Agricultural water resources	<ul style="list-style-type: none"> <li>• Irrigation, reservoirs, hydraulic structures, ground water exploitation for agricultural use.</li> </ul>	10%
31150	Agricultural inputs	<ul style="list-style-type: none"> <li>• Supply of seeds, fertilizers, agricultural machinery / equipment.</li> </ul>	10%
31220	Forestry development	<ul style="list-style-type: none"> <li>• Afforestation for industrial and rural consumption;</li> <li>• Exploitation and utilization;</li> <li>• Erosion control, desertification control;</li> <li>• Integrated forestry projects.</li> </ul>	5%
<b>Total:</b>			<b>100%</b>

5. Gender Equality (200)			
Priority Code	Description	Definition	Est. %
202	Gender Equality is one of the objectives/results.	<ul style="list-style-type: none"> <li>• Gender equality is not the principal reason for undertaking CRCID funded programs and/or projects;</li> <li>• It is one of the stated objectives and/or results of the project or program to support the achievement of gender equality;</li> <li>• The designation is not based on the composition of the target group but on gender equality being an objective and/or result.</li> </ul>	100%
<b>Total:</b>			<b>100%</b>

6. Capacity Development (500)			
Priority Code	Description	Definition	Est. %
502	Capacity, skills and productivity enhancement in developing countries.	<ul style="list-style-type: none"> <li>• Develop and disseminate educational/training materials in primary language of developing country (initially English, French, and Spanish);</li> <li>• Conduct sustainable development</li> </ul>	50%

## CRCID SECTORAL PRIORITIES

		<p>training seminars and workshops in the developing country;</p> <ul style="list-style-type: none"> <li>Educate and train Canadian Rotarians in sustainable development.</li> </ul>	
503	Canadian and developing country private sector linkages	<ul style="list-style-type: none"> <li>Continue to emphasize importance of Canadian Rotary clubs developing linkages with developing country Rotary clubs.</li> </ul>	50%
<b>Total:</b>			<b>100%</b>

7. Environment (600)			
Priority Code	Description	Definition	Est. %
601	Environmental conservation	<ul style="list-style-type: none"> <li>Each program and project shall either have no impact or improve the environment.</li> </ul>	50%
605	Environmental analysis and assessment	<ul style="list-style-type: none"> <li>Each program and project shall submit a detailed application that includes an environmental analysis, when requesting funding from CRCID.</li> </ul>	50%
<b>Total:</b>			<b>100%</b>

## Appendix 5



# CRCID

## Canadian Rotary Collaboration for International Development

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### FACT SHEET #1

## CIDA Priorities and CRCID

Published: October 2011

### Purpose:

The purpose of this fact sheet is to discuss CIDA's Aid Effectiveness Agenda and how its sectoral priority themes relate to CRCID's current Sectoral Priorities. In addition it raises potential opportunities in how CRCID is positioning itself to not only maintain but also to extend this critical CIDA partnership. The key to CRCID's ongoing sustainability will be its ability to continually adapt to the shifting policies and procedures of CIDA, its primary funding partner.

### CRCID as a CIDA Partner Organization:

CRCID is well-positioned in regards to CIDA's new Priority themes announced in 2010, especially "**securing the future for children and youth**". Its two Sectoral Priorities: Health Concerns and Literacy and Education fall within this priority theme and all 2010-2013 developing country programs are directly or indirectly focused on assisting children and youth.

### Introduction:

CRCID was established as a conduit for Canadian Rotary clubs to access Government of Canada funds through the Partnership Branch of CIDA (Canadian International Development Agency) to implement World Community Service Projects. Since its inauguration in 1986 CRCID has had to adapt to shifting governmental priorities and expectations in order to retain this partnership with CIDA. Each adaptation has moved us towards becoming an integral funding partner with the clubs and districts implementing sustainable programs and projects in developing countries. CRCID provides Rotary clubs with critical knowledge and expertise to improve the sustainability of their programs and valuable support and guidance with program development; narrative and financial reporting; and implementation challenges.

CIDA and the Government of Canada recognize and value its partnership with CRCID and Rotary as Rotary is the only organization with a global grassroots humanitarian network comprised of dedicated volunteers who are community leaders. No other organization has this capacity to do "good in the world". Rotarians are universally respected and welcomed for their humanitarian efforts. Through the partnership with CRCID, the Government of Canada is also a recipient of this goodwill.

### CIDA's Aid Effectiveness Agenda<sup>1</sup>

The Government of Canada is committed to making Canada's international assistance more efficient, focused, and accountable. In view of this approach, CIDA has undertaken steps to make its work more effective, in line with international agreements and recognized best practices.

CIDA's aim is to help people living in poverty in developing countries. It does so by supporting initiatives that are sustainable. CIDA is now increasing its efforts to achieve greater efficiency, accountability, and focus to maximize the benefits brought through the public funds of Canadians. To achieve effectiveness in delivering its international aid, Canada is focusing its efforts geographically and thematically.

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<sup>1</sup> Copied from CIDA website: <http://www.acdi-cida.gc.ca/acdi-cida/ACDI-CIDA.nsf/eng/FRA-825105226-KFT>  
Accessed July 4, 2011

## Geographic Focus<sup>2</sup>

As part of its Aid Effectiveness Agenda, the Government of Canada announced in 2009 that it will be focusing 80 percent of bilateral resources in 20 countries of focus. These 20 countries were chosen based on their real needs, their capacity to benefit from aid, and their alignment with Canadian foreign policy priorities. The goal is to make Canada's international assistance more focused, more effective and more accountable. While the Partnership with Canadians Branch of CIDA will provide 50% of its funding to projects of merit within this group of 20 focus countries 50% will also be available to projects of merit outside of this group of 20 focus countries

## Thematic Focus<sup>3</sup>

CIDA has also chosen priority themes on which to concentrate its efforts. These are areas where Canada has proven its leadership, namely:

- Increasing food security
  - *Food aid and nutrition*
  - *Sustainable agricultural development, particularly for small-scale farmers and women*
  - *Research and development*
- Securing the future of children and youth
  - *Child survival, including maternal health*
  - *Access to quality education*
  - *Safe and secure futures for children and youth*
- Stimulating sustainable economic growth
  - *Building economic foundations*
  - *Growing businesses*
  - *Investing in people*

## How CRCID Retains the CIDA Partnership

- Ensure Rotary programs are sustainable with measurable results;
- Comply with application guidelines using language familiar to CIDA reviewers;
- Ensure CRCID has the required expertise at all levels of the organization to support its work<sup>4</sup>;
- Educate and support Rotary volunteer Coordinators with the planning; implementation; and, reporting on the developing country programs;
- Increase knowledge and understanding of Results Based Management (RBM) and the logic frame matrix within the Secretariat to ensure standardization of information and compliance with CIDA requirements;
- Work closely with the CIDA Project Officers to ensure ongoing two-way communication;
- Educate CIDA personnel and parliamentarians about Rotary and its global volunteer service culture; and
- Ensure that at least some of the programs it financially supports are located in the Government of Canada's countries of focus.

## Discussion:

To ensure ongoing financial support for the sustainable Canadian Rotary developing country programs and projects, CRCID continues to manage and adapt its relationship with CIDA and with Canadian Rotary clubs ensuring this support meet the beneficiary needs and the needs meet the funding priorities. CRCID has made significant improvements in its development capacity over the past few years and this process is continuing. One of CRCID's strengths is its ability to adapt to changing policies and procedures introduced by both the Canadian government and the Rotary Foundation. Rotary's strength is its global network of community-minded business and professional volunteers, which are highly valued by CIDA. CIDA funding is highly valued by the programs because it often represents the single greatest funding source and can be used to fund elements of the program not permissible by the Rotary Foundation, such as salaries and construction.

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<sup>2</sup> See Fact Sheets #3 for the CIDA countries of focus and Fact Sheet #4 for the Official Development Assistance countries

<sup>3</sup> See Fact Sheet #2 for the CIDA Priority Themes

<sup>4</sup> Final Report: CRCID Mid-Term Program Evaluation of CRCID. Universalis, December 2008: page 50.



# CRCID

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## FACT SHEET #2

### CIDA Priority Theme: Securing the Future of Children and Youth<sup>1</sup>

#### CIDA's Aid Effectiveness Agenda:

The Government of Canada has committed to making Canada's international assistance more efficient, focused, and accountable. In view of this approach, CIDA has undertaken steps to make its work more effective, in line with international agreements and recognized best practices.

CIDA's aim is to help people living in poverty in developing countries. It does so by supporting initiatives that are sustainable, have impact, and bring results to those intended. CIDA is now increasing its efforts to achieve greater efficiency, accountability, and focus to maximize the benefits brought through the public funds of Canadians.

To achieve effectiveness in delivering its international aid, Canada is focusing its efforts geographically and thematically. CIDA has selected 3 priority themes to focus its efforts:

- Increasing food security;
- Securing the future of children and youth; and
- Stimulating sustainable economic growth.

#### Securing the future of children and youth

Today's generation of children and youth is the largest ever in history, with nearly half of the world's 6.9 billion people under the age of 25 and, of these more than 90 percent live in the developing world.

In many developing countries, children are 12 times more likely to die before they reach the age of five. Their deaths are often the result of poor water quality and inadequate sanitation, malnutrition or diseases that could otherwise be prevented. In many areas, a basic education is not even an option, with 67 million children—53 percent of them girls—having no access to school or other learning opportunities that can give them hope for a better future.

CIDA is focusing on increasing:

- Child survival, including maternal health;
- Access to quality education; and
- Safe and secure futures for children and youth.

#### Child survival, including maternal health—Strategy highlights

- Working to improve access to maternal healthcare in an effort to reduce maternal and newborn deaths
- Investing more in child-specific, integrated health interventions, which include immunization, nutritional supplements, and clean water
- Investing more in the prevention of diseases such as HIV/AIDS, malaria and tuberculosis and in water, and sanitation, all of which directly affect mothers and children
- Strengthening sustainable health systems that can provide quality health care to mothers and children

<sup>1</sup> See CIDA Website: <http://www.acdi-cida.gc.ca/acdi-cida/acdi-cida.nsf/eng/FRA-1015151610-QLN>

- Helping train health care workers to address the needs of mothers and children under the age of five

### **Access to a quality education—Strategy highlights**

- Improving access to basic education, particularly for girls
- Improving the quality of education and promoting learning achievement with a particular focus on teachers and teacher training, relevant curriculum, and teaching/learning materials
- Increasing access to learning opportunities for youth in and out of school

### **Safe and secure futures for children and youth—Strategy highlights**

- Strengthening and implementing frameworks to better protect the human rights of children and youth, particularly girls, who are at increased risk of violence, exploitation and abuse
- Ensuring that schools are safe and free from violence and abuse and are child-friendly learning environments
- Helping youth-at-risk find alternatives to violence and crime and engage as positive and productive members of their societies

### **Relevance to CRCID Sectoral Priorities:**

CIDA’s priority theme of “Securing the Future for Children and Youth” matches well with CRCID’s sectoral priorities. Each of the 3 priorities listed above include elements that match very closely with CRCID’s two (sectoral) priority foci:

1. Health Concerns (including water & sanitation management); and,
2. Literacy and Education.

All programs and related projects requesting funds from CRCID must qualify under one or both of these sectoral priorities. In addition to the CIDA examples provided on the previous page, other **Examples** of possible program/project in each sectoral priority potentially eligible for CRCID funding are provided below:

#### **Health Concerns**

- Polio eradication;
- Health education;
- Primary health care;
- Regional Health clinics and Health Fairs;
- Preventive health measures (e.g. vaccination programs);
- Prenatal and maternity care
- Infant health;
- HIV/AIDS, Malaria, Tuberculosis;
- Children at Risk (orphanage modelling);
- Technical training of health trainers;
- Specialist exchanges;
- Long distance (teleconferencing) health training; and
- Tele-medicine.

#### *Water & Sanitation Management*

- Water supply and sanitation – large systems;
- Water supply and sanitation – small systems
- Education and training in water supply; sanitation; and hygiene
- Examples of interventions:
  - Wells and pumps;
  - Toilets and septic tanks;
  - Sewage systems;
  - Rainwater harvesting;
  - Point of use water projects (e.g. solar disinfection – soldis)

#### **Literacy and Education**

- Education programs (e.g. Light House; Concentrated Language Encounter, etc.)
- Basic education (grade 1 - 12 or equivalent);
- Early childhood education;
- Adult literacy;
- Teacher training;
- School equipment & furniture



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### FACT SHEET #3

## Canadian International Development Agency (CIDA) Countries of Focus<sup>1</sup>

As part of its Aid Effectiveness Agenda, the Government of Canada announced in 2009 that it will be focusing 80 percent of bilateral resources in 20 countries of focus. These 20 countries were chosen based on their real needs, their capacity to benefit from aid, and their alignment with Canadian foreign policy priorities. The goal is to make Canada's international assistance more focused, more effective and more accountable.

The countries of focus are:

#### **Americas**

Bolivia - Caribbean Regional Program\* - Colombia - Haiti - Honduras - Peru

#### **Asia**

Afghanistan - Bangladesh - Indonesia - Pakistan - Vietnam

#### **Eastern Europe**

Ukraine

#### **North Africa and Middle East**

West Bank and Gaza\*\*

#### **Sub-Saharan Africa**

Ethiopia - Ghana - Mali - Mozambique - Senegal- Sudan - Tanzania

\*The Caribbean Regional Program includes fourteen countries:

- 11 island states (Antigua and Barbuda, Bahamas, Barbados, Dominica, Grenada, Jamaica, Montserrat, Saint Kitts & Nevis, Saint Lucia, Saint Vincent & the Grenadines, Trinidad & Tobago); and,
- 3 continental states (Belize, Guyana, and Suriname).

\*\* Also known as Palestinian Administered Areas

### CIDA Geographic Funding Policy:

#### 1. Bilateral Branch

*The Bi-Lateral branch (i.e. government to government) is allocating 80% of its funding budget to programs within this group of 20 focus countries, with the remaining 20% allocated to programs of merit in countries outside of this group that are eligible for Official Development Assistance.*

#### 2. Partnerships with Canadians Branch Funding Criteria:

*The Partnership with Canadians Branch of CIDA allocates 50% of its funding to projects of merit within this group of 20 focus countries allowing the remaining 50% to be allocated to projects of merit outside of this group that are eligible for Official Development Assistance.<sup>2</sup>*

<sup>1</sup>CIDA Countries of Focus: <http://www.acdi-cida.gc.ca/acdi-cida/ACDI-CIDA.nsf/eng/JUD-51895926-JEP>

## Partnership with Canadians Branch

CRCID partners with CIDA's Partnerships with Canadians Branch (PWCB). PWCB recognizes and supports the work of Canadian organizations dedicated to improving the lives of those living in poverty in developing countries. Under its Partners for Development Program, PWCB approves projects and programs that are effective, efficient, accountable, and will make a meaningful difference on the ground. Working in partnership means that efforts to reduce poverty will have positive outcomes and reflect Canadian values of compassion and caring.

### Partners for Development Program

*CIDA co-invests with partners, such as CRCID, with a minimum of three years of significant international development experience in more than one country, in projects that can make a significant contribution to poverty reduction, in accordance with aid effectiveness principles. Large project proponents will have a long-term plan that reflects a programmatic approach. The plan will include a clearly articulated exit and sustainability strategy for activities that take place during the time of the funding agreement. Under this category, CIDA will contribute \$2 million or more to projects for a duration of up to five years.*

## CRCID's Geographic Focus Policy

(Revised: 21/11/07BOD)

CRCID is subject to the Government of Canada requirement that the geographic focus for any program requesting Government of Canada funding must be identified in the organization's program funding proposal. Once the funding is approved, these countries cannot be changed without prior consultation and approval from the Government of Canada.

CRCID will accept program proposals for the next funding cycle from Canadian Rotary clubs, Districts or other entities recognized by Rotary International by **June 30, 2012**. The program seeking funding support from CRCID must be located in a country identified as being eligible for "Official Development Assistance" by the Canadian Government and CRCID Board of Directors.

CRCID will review the proposals and select those programs that best match CRCID's funding criteria for inclusion in the program funding proposal submitted to the Canadian Government by **October 1, 2012**. The number of countries receiving CRCID funding support under a Government of Canada funding agreement is limited to a maximum of 10.

Programs approved for CRCID funding will be eligible to receive funds after authorized representatives of CRCID and CIDA have signed the Program Funding Contribution Agreement.

The current regions eligible for funding are as follows:

- Central America & Caribbean
- Eastern & Southern Africa

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<sup>2</sup> See Fact Sheet #4: List of Official Development Assistance Countries



# CRCID

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### FACT SHEET #4

## Defining Countries Eligible for Official Development Assistance (ODA)<sup>1</sup>

### Preamble:

To be eligible for CIDA funding, all Canadian international development organizations, including CRCID, may only implement projects and programs in Official Development Assistance (ODA) countries.

### What is ODA?

Developed countries, such as Canada, implement various types of cooperation in developing countries. These include providing funds, transferring technologies for social and economic growth, assistance for disaster relief, and so forth. Such cooperation, mainly undertaken by the Government sector, is called ODA (Official Development Assistance).

### How are Countries Declared Eligible for ODA?

The Organization for Economic Co-operation and Development's *Development Assistance Committee* (DAC) is a forum for selected OECD member states to discuss issues surrounding aid, development and poverty reduction in developing countries. It describes itself as being the "venue and voice" of the world's major donor countries. Since its inception, one of the DAC's main functions has been to collect and publish statistics on aid flow. In 1969 the DAC's members adopted a criterion for calculating their aid contributions. They called the resulting measure of aid contributions Official Development Assistance (ODA). It has become widely used by other organizations, and scholars, as a general measure of aid.

### What is the OECD?

The *Organization for Economic Co-operation and Development (OECD)*, is an international economic organization of 34 countries founded in 1961 to stimulate economic progress and world trade. It is a forum of countries committed to democracy and the market economy, providing a platform to compare policy experiences, seek answers to common problems, identify good practices, and co-ordinate domestic and international policies of its members.

### What is the ODA List?

The Development Assistance Committee (DAC) List of ODA Recipients shows all countries and territories eligible to receive official development assistance (ODA). These consist of all low and middle income countries, except G8 members, EU members, and countries with a firm date for entry into the EU.

### Significance for CRCID:

Any Rotary program seeking funding support from CRCID must be located in a country identified as being eligible for "Official Development Assistance" by the Canadian Government and CRCID Board of Directors. The list of ODA eligible countries can be found on the next page of this fact sheet. Also, to be eligible for CRCID funding, programs may only be implemented in those countries with Rotary clubs.

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<sup>1</sup> All DAC & OECD information taken from Wikipedia such as:  
[http://en.wikipedia.org/wiki/Development\\_Assistance\\_Committee](http://en.wikipedia.org/wiki/Development_Assistance_Committee)

## DAC List of ODA Recipients<sup>2</sup>

Least Developed Countries	Other Low Income Countries GNI < \$935 in 2007)	Lower Middle Income Countries and Territories (per capita GNI \$936-\$3,705)	Upper Middle Income Countries and Territories (per capita GNI \$3,706-\$11,455 in 2007)
<u><b>Afghanistan</b></u> Angola <u><b>Bangladesh</b></u> Benin Bhutan Burkina Faso Burundi Cambodia Central African Rep. Chad Comoros Congo, Dem. Rep. Djibouti Equatorial Guinea Eritrea <u><b>Ethiopia</b></u>  Gambia Guinea Guinea-Bissau <u><b>Haiti</b></u> Kiribati Laos Lesotho Liberia Madagascar Malawi Maldives <u><b>Mali</b></u> Mauritania <u><b>Mozambique</b></u> Myanmar Nepal Niger Rwanda Samoa São Tomé and Príncipe <u><b>Senegal</b></u> Sierra Leone Solomon Islands Somalia <u><b>Sudan</b></u> <u><b>Tanzania</b></u> Timor-Leste Togo Tuvalu Uganda Vanuatu Yemen Zambia	Côte d'Ivoire <u><b>Ghana</b></u> Kenya Korea, Dem. Rep. Kyrgyz Rep. Nigeria <u><b>Pakistan</b></u> Papua New Guinea Tajikistan Uzbekistan <u><b>Viet Nam</b></u> Zimbabwe	Albania Algeria Armenia Azerbaijan <u><b>Bolivia</b></u> Bosnia and Herzegovina Cameroon Cape Verde China <u><b>Colombia</b></u> Congo, Rep. Dominican Republic Ecuador Egypt El Salvador Former Yugoslav Republic of Macedonia Georgia Guatemala <u><b>Guyana</b></u> <u><b>Honduras</b></u> India <u><b>Indonesia</b></u> Iran Iraq Jordan Kosovo3 Marshall Islands Micronesia, Federated States Moldova Mongolia Morocco Namibia Nicaragua Niue <u><b>Palestinian Administered Areas</b></u> Paraguay <u><b>Peru</b></u> Philippines Sri Lanka Swaziland Syria Thailand *Tokelau Tonga Tunisia Turkmenistan <u><b>Ukraine</b></u> *Wallis and Futuna	*Anguilla <u><b>Antigua and Barbuda1</b></u> Argentina <u><b>Barbados2</b></u> Belarus <u><b>Belize</b></u> Botswana Brazil Chile Cook Islands Costa Rica Croatia Cuba <u><b>Dominica</b></u> Fiji Gabon  <u><b>Grenada</b></u> <u><b>Jamaica</b></u> Kazakhstan Lebanon Libya Malaysia Mauritius *Mayotte Mexico Montenegro <u><b>*Montserrat</b></u> Nauru Oman1 Palau Panama Serbia Seychelles South Africa *St. Helena <u><b>St. Kitts-Nevis</b></u> <u><b>St. Lucia</b></u> <u><b>St. Vincent and Grenadines</b></u> <u><b>Suriname</b></u> <u><b>Trinidad and Tobago2</b></u> Turkey Uruguay Venezuela

\*Territory.

(1) Antigua & Barbuda and Oman exceeded the high income country threshold in 2007. In accordance with the DAC rules for revision of this List, both will graduate from the List in 2011 if they remain high income countries until 2010.

(2) Barbados and Trinidad & Tobago exceeded the high income country threshold in 2006 and 2007. In accordance with the DAC rules for revision of this List, both will graduate from the List in 2011 if they remain high income countries until 2010.

(3) This does not imply any legal position of the OECD regarding Kosovo's status.

<sup>2</sup> DAC List of ODA Countries: <http://www.oecd.org/dataoecd/32/40/43540882.pdf>

**Note:** CIDA Countries of Focus are highlighted and underlined.



# CRCID

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### FACT SHEET #5

## CIDA Call for Proposals System

Approved January 19, 2012

#### **Preamble:**

In November 2010 the Partnership with Canadian's Branch (PWCB) of CIDA introduced a new procedure for funding Canadian not for profit international development organizations programs in ODA countries (see fact sheet #4 for the definition of ODA). The PWCB will only accept proposals in response to issued "calls for proposals" that will fall into one or more of the following 3 categories:

1. Projects over \$2 million;
2. Project under \$2 million;
3. Specialized calls (thematic or country).

While it is anticipated that there will be a call in the Spring and another in the Fall, the actual schedule has not yet been determined. Also, between posting the call and the submission deadline there will only be two to possibly three months for an organization to prepare and submit an appropriate response.

#### **Organizational Qualifications:**

Organizations submitting proposals must be incorporated in Canada and have at least two years experience managing and delivering international development projects in developing countries. All organizations must be financially sound and have strong governance structures, including clear mission, fiscal oversight, management capacity, and transparent decision making.

#### **Proposal Assessment:**

CIDA's PWCB will assess all completed proposals on a comparative basis against the following five partnership principles.

1. Sound governance
2. Support of Canadians
3. Relevance to CIDA mandate and coherence with Government of Canada policy
4. Results
5. Development effectiveness

#### **Review Process:**

The CIDA steps in the review process that all organizations must pass are as follows:

1. Ensure the submission is complete and all required documentation is attached to the applicant's profile. Incomplete applications will not be assessed;
2. Check the organization's eligibility against the principles of Sound Governance and Support of Canadians. Organizations must pass steps 1 & 2 in order for the proposal to proceed to step 3;
3. Assess the proposal's merit against the principles:
  - a. Relevance to CIDA's mandate and coherence with Government of Canada policy; and,
  - b. Project Results and Development effectiveness;
4. Once a proposal has passed Step 3, CIDA will assess the fiduciary risks associated with the partnership, which includes a detailed assessment of the organization's management and financial capacity;
5. The risk assessment will be used to determine the administration requirements for each funding agreement.

CIDA will support the most meritorious of proposals while ensuring the best fit with the priorities announced in the call. Availability of resources may result in less funding than requested. To ensure transparency and

fairness to all applicants, CIDA will not discuss applications until all organizations have been notified of decisions regarding their proposals.

**Impact on CRCID:**

This new Call for Proposal system has significant implications for CRCID. In the past, CRCID has submitted a program funding proposal approximately 6 months in advance of the end of the current agreement. Upon submission there was often discussion and negotiation between CRCID and its Project Officer before the application was approved. Under this new system, once the application is submitted there will be no further discussion until it is either approved or rejected.

Since each call could potentially be unique, CRCID will need to review each call very carefully and only submit those developing country programs that fit the funding criteria parameters of the call. Due to the limited time frame available for a response to a call, CRCID will not be able to send out its own request for proposals after CRCID learns of the CIDA call. Clubs simply wouldn't have enough time to respond with a proposal that has the potential for first CRCID and then CIDA approval.

**CRCID Proposal Submission Procedures:**

1. Canadian Rotary clubs, districts and RAGS submit program proposals no later than June 30, 2012.
2. CRCID creates a "bank" of approved programs ready to be submitted to CIDA once the "Call for Proposals" has been announced.
3. CRCID announces the list of programs included in the "bank" by August 31, 2012..
4. Within two working days of CRCID becoming aware of CIDA's Call for Proposals announcement, CRCID informs the coordinators of the approved programs (in the "bank"). This provides the Coordinators with the opportunity to make any necessary adjustments to their proposals to comply with CIDA's specific requirements reflected in the call. CRCID encourages the coordinators to work closely with the CRCID Secretariat to ensure their proposals meet most if not all CIDA requirements.
5. CRCID submits approved proposals to CIDA.

**Note**

For those programs engaging a non-Rotary implementing organization the eligible Rotary entity needs to ensure the program retains a level of ownership and responsibility in implementing and managing the programs that is in compliance with Rotary policies and procedures.

## Appendix 6



CRCID

**Canadian Rotary Collaboration for  
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## Description of RBM Terminology

Keeping it Simple

### Results Based Management

RBM is about managing for results. It implies that a program or organization plan can implement in such a way as to achieve some kind of outcome, rather than just focusing on getting the money out the door, services provided, or infrastructure built. RMB asks “so what?” So what that activities have taken place? So what that outputs have been generated? So what that the outputs from these activities have been counted? RMB involves a focus on what came out of these activities and outputs; what changed because of them. The point of RBM is also to deliberately learn from past performance and adjust accordingly.

#### Input:

Resources or Staff that are used to produce Outputs.

*Example*

*Roberts McElroy Marketing Firm*

#### Activity:

All activities that will take place in order to accomplish the outputs, outcomes, and the impact.

*Example*

*CRCID will inform CIDA in writing of any public engagement efforts, at least one week prior to their taking place.*

#### Outputs:

Products and services that are expected to be produced by the project.

*Example*

*The Public Engagement Campaign will target Secondary Schools across Canada.*

#### Output Indicators:

An indicator is how success is measured. Good Indicators are valid, reliable, simple, affordable, neutral and usable. This is done mostly through numbers and percentages.

For Example: An Output Indicator could be the Number or Percent of school desks that the program will or has supplied.

*Example*

*(success of the public engagement campaign is measured through) The number of Canadian schools and Rotary Clubs contacted by CRCID.*

**Outcomes:**

The Outcome is simply a reaction or a result from the Outputs. This is change that you help bring, and can also be influenced by external factors.

*Example*

*(As a reaction from Canadian Schools being contacted) The Canadian public will have an understanding of the Canadian Rotary Centennial Afghanistan Challenge project.*

**Outcome Indicators:**

An Indicator is how success is measured. Good Indicators are valid, reliable, simple, affordable, neutral and usable. This is done mostly through numbers and percentages. *Because we are at the beginning of the project, we do not yet know the numbers or percentages that will be available. However, we do want to know how it is that we will find them.*

*Example from page 7*

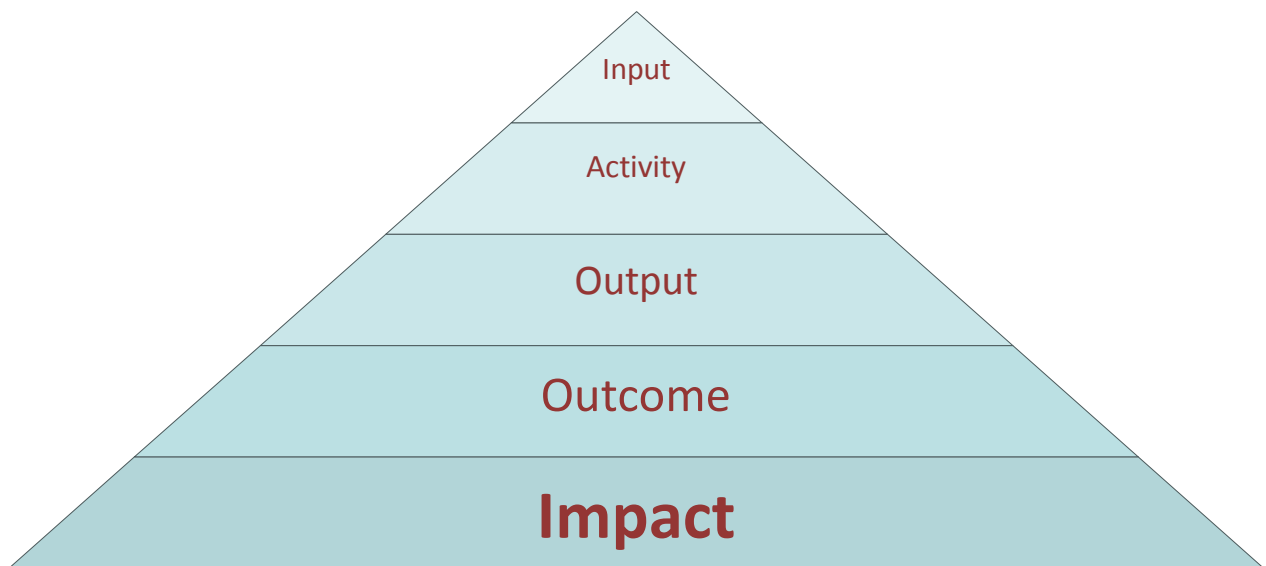
*(Success of the public having an understanding of the project is measured through) The amount of donations made towards the project.*

**Impact**

The Impact is really asking for a long term reaction that is derived from the project. This is what will happen long after the project is finalized.

*Example from page 7*

*(As a Reaction from the entire project) Students from across Canada will be knowledgeable about the challenges that Afghan children face.*





## Appendix 7

## DAC List of ODA Recipients<sup>2</sup>

Least Developed Countries	Other Low Income Countries GNI < \$935 in 2007)	Lower Middle Income Countries and Territories (per capita GNI \$936-\$3,705)	Upper Middle Income Countries and Territories (per capita GNI \$3,706-\$11,455 in 2007)
<u><b>Afghanistan</b></u> Angola <u><b>Bangladesh</b></u> Benin Bhutan Burkina Faso Burundi Cambodia Central African Rep. Chad Comoros Congo, Dem. Rep. Djibouti Equatorial Guinea Eritrea <u><b>Ethiopia</b></u>  Gambia Guinea Guinea-Bissau <u><b>Haiti</b></u> Kiribati Laos Lesotho Liberia Madagascar Malawi Maldives <u><b>Mali</b></u> Mauritania <u><b>Mozambique</b></u> Myanmar Nepal Niger Rwanda Samoa São Tomé and Príncipe <u><b>Senegal</b></u> Sierra Leone Solomon Islands Somalia <u><b>Sudan</b></u> <u><b>Tanzania</b></u> Timor-Leste Togo Tuvalu Uganda Vanuatu Yemen Zambia	Côte d'Ivoire <u><b>Ghana</b></u> Kenya Korea, Dem. Rep. Kyrgyz Rep. Nigeria <u><b>Pakistan</b></u> Papua New Guinea Tajikistan Uzbekistan <u><b>Viet Nam</b></u> Zimbabwe	Albania Algeria Armenia Azerbaijan <u><b>Bolivia</b></u> Bosnia and Herzegovina Cameroon Cape Verde China <u><b>Colombia</b></u> Congo, Rep. Dominican Republic Ecuador Egypt El Salvador Former Yugoslav Republic of Macedonia Georgia Guatemala <u><b>Guyana</b></u> <u><b>Honduras</b></u> India <u><b>Indonesia</b></u> Iran Iraq Jordan Kosovo3 Marshall Islands Micronesia, Federated States Moldova Mongolia Morocco Namibia Nicaragua Niue <u><b>Palestinian Administered Areas</b></u> Paraguay <u><b>Peru</b></u> Philippines Sri Lanka Swaziland Syria Thailand *Tokelau Tonga Tunisia Turkmenistan <u><b>Ukraine</b></u> *Wallis and Futuna	*Anguilla <u><b>Antigua and Barbuda1</b></u> Argentina <u><b>Barbados2</b></u> Belarus <u><b>Belize</b></u> Botswana Brazil Chile Cook Islands Costa Rica Croatia Cuba <u><b>Dominica</b></u> Fiji Gabon  <u><b>Grenada</b></u> <u><b>Jamaica</b></u> Kazakhstan Lebanon Libya Malaysia Mauritius *Mayotte Mexico Montenegro <u><b>*Montserrat</b></u> Nauru Oman1 Palau Panama Serbia Seychelles South Africa *St. Helena <u><b>St. Kitts-Nevis</b></u> <u><b>St. Lucia</b></u> <u><b>St. Vincent and Grenadines</b></u> <u><b>Suriname</b></u> <u><b>Trinidad and Tobago2</b></u> Turkey Uruguay Venezuela

\*Territory.

(1) Antigua & Barbuda and Oman exceeded the high income country threshold in 2007. In accordance with the DAC rules for revision of this List, both will graduate from the List in 2011 if they remain high income countries until 2010.

(2) Barbados and Trinidad & Tobago exceeded the high income country threshold in 2006 and 2007. In accordance with the DAC rules for revision of this List, both will graduate from the List in 2011 if they remain high income countries until 2010.

(3) This does not imply any legal position of the OECD regarding Kosovo's status.

<sup>2</sup> DAC List of ODA Countries: <http://www.oecd.org/dataoecd/32/40/43540882.pdf>

**Note:** CIDA Countries of Focus are highlighted and underlined.