A. M. Qattan Foundation
مؤسسة عبد المحسن القطان

[RESOURCE DEVELOPMENT POLICY AND PROCEDURES]

Disclaimer

Table of Contents

Foundation Profile

The A.M. Qattan Foundation is a British registered charity (No. 1029450) and a charitable company limited by guarantee registered in England and Wales (No. 2171893). The Foundation was legally registered on 9 May 1998 with the Palestinian Ministry of Interior as a branch of a foreign charity and a not-for-profit organization (No. 5056), and re-registered in 2004 (No. QR-0035-F) in accordance with the law for social institutions for the year 2000.

Vision

A just, free, enlightened and tolerant society with a global presence; one that embraces dialogue and is a producer of knowledge, art and literature.

Mission Statement

The Foundation is an independent, not-for-profit developmental institution working in the culture and education sectors targeting a variety of social groups, particularly children, teachers and young artists, which:

1. Aims to empower free-thinking, enlightened individuals to overcome the challenges of war and injustice and to create a flourishing and dynamic society in Palestine and the Arab World;

2. Adopts a long-term, participatory developmental ethos through programmes that foster critical thinking, research, creativity and the production of knowledge, while also providing an inspiring model of transparency and excellence; and,

3. Advocates cultural and educational development as an essential tool of resistance for a society faced by conditions of acute political instability and humanitarian catastrophe.

Programmes

The Foundation focuses its work in two sectors, culture and education, and is currently implementing three programs through:

1. The Qattan Centre for Educational Research & Development (QCERD);
2. The Qattan Centre for the Child (QCC); and
3. The Culture and Arts Programme (CAP).

Board of Trustees
- Abdel Mohsin Al-Qattan – Chairman
- Laila Al-Qattan
- Najwa Al-Qattan
- Leenah Al-Qattan
- Omar Al-Qattan – Secretary

Management Committee
- Executive Director

- Programme directors:
  - Director of QCERD,
  - Director of QCC,
  - Director of CAP,
- Director of Finance,
- Director of Communications and Resource Development (DCRD).

Contact Information

United Kingdom

Tower House
226 Cromwell Road
London SW5 0SW
Tel + 44 207 370 9990
Fax + 44 207 370 1606

Palestine

P.O. Box 2276
22 Al-jihad St.
Ramallah - Palestine
Tel + 972 2 296 0544
Fax + 972 2 298 4886
Email: info@qattanfoundation.org

Introduction

This document shall be referred to as the Resource Development Policy and Procedures (RDP) which contains guidelines on resource development activities undertaken by the A.M. Qattan Foundation. These policies and procedures shall guide all employees involved with resource development activities with no exceptions, unless otherwise noted in writing by the Foundation's Executive Director and approved by the Board of Trustees (BoT).

The authority for the Foundation's RDP policies and procedures described in this document is derived from the approval of the Board of Trustees.

Only the Executive Director of the Foundation may recommend alterations or modifications on any of the policies stated in this RDF document subsequent to review and discussions within the Management Committee. Any suggested alterations or modifications of the policies must be submitted to the BoT in writing, and take effect after the BoT's written approval.

Should any provision in this RDP be found to be unenforceable and invalid, it does not invalidate the entire document, but only that particular provision.

Receipt and Acknowledgment of the RDP

All employees involved in resource development activities must read the following statements, sign below and return to the Executive Director or Director of Communication and Resource Development (DCRD) as applicable. The signed statements shall be kept in the personal file of the signatory through the Foundation's Administrative Officer.

Understanding and Acknowledging Receipt of the Foundation RDP

I have received and read a copy of the Foundation's resource development policy and procedures. I understand and accept all articles within it.

Confidential Information

I am aware that during the course of my employment, confidential information will be made available to me. I understand that this information is the sole property of the A.M. Qattan Foundation and therefore must not be given out, shared or used outside the Foundation's premises. In the event of termination of employment, whether voluntary or involuntary, I hereby agree not to utilise, exploit or discuss this information with any other individual or entity.

_____   _____

Employee Name (printed)   Position

_____   _____

Employee Signature   Date

Resource Development

Preface

The Foundation's main funding source is the Al-Qattan family. The intention of the family is to assure the Foundation's independence and address its needs by covering its administrative budget and funding its core activities in culture and education, which are manifested through:

1.   The Qattan Centre for Educational Research & Development (QCERD);
2.   The Qattan Centre for the Child (QCC); and,
3.   The Culture and Arts Programme (CAP).

The Foundation's Board of Trustees (BoT) took an important strategic decision in 2009 to double the Foundation's budget over the next five years, with the aim of increasing external co-funding to reach 40% of the annual budget. Thus, having a long term focused resource development policy is important to achieve this BoT stated objective. This Framework has been developed to achieve the Foundation's resource development strategic goals, through strengthening existing co-funding partnerships and attracting new ones.

The implementation of this framework will be the responsibility of the Director of Communications and Resource Development, Programme Directors, the Director of Finance and the Executive Director.

Resource Development

Policy

All resource development activities will be performed in accordance with the Foundation's policies and procedures. BoT approval of the idea or planned activity and the co-funding partner is a prerequisite to seeking long term partnerships or collaboration with local, regional and/or international organizations.

It is the policy of the Foundation to:

- Seek external co-funding to expand existing activities or to introduce new projects within the framework of the Foundation's programmes in culture and education which are currently implemented through the Qattan Centre for Educational Research and Development (QCERD), the Qattan Centre for the Child, and the Culture and Arts Programme, provided that the Foundation takes full or leading control of the project design and implementation. The Foundation's administrative expenses and the majority of its programme costs are covered by the Al-Qattan family to ensure the Foundation's independence and the highest level of services.

- Only accept donations which have no pre-conditions attached with regard to programme beneficiaries, awards recipients, implementing partners, publicity, and/or any other conditions outside the scope of the Foundation's vision, mission, values and objectives, or those that may contradict its policies and procedures.

- Reach a 40% share in external partner co-funding from the total annual budget, and maintain the new increase, focusing on long-term strategic partnerships.

- Apply for funding sources only through solicited proposals; these are proposals written in response to a request for proposal (RFP) or based on discussions and concurrence with a potential funding partner. The Foundation will not send any proposals to funding sources without preliminary contact that promotes, at least, a basic understanding between the Foundation and the source.

- Conduct resource development activities with the aim of strengthening existing partnerships and to develop new ones. The Foundation seeks to build long-term partnerships with local, regional and/or international organizations to diversify its pool of co-funding partners.

- Accept commercial sponsorships from the private sector for activities and/ or interventions that fall under its core programmes. However, it is the Foundation's policy not to accept any commercial sponsorship that aims to promote the sponsoring company and/or the endorsement of its commercial products or services. However, the sponsor may be acknowledged as a contributor.

- Comply with the funding partner's requirements as per the terms and conditions of signed agreements. To ensure compliance, all signed agreements shall be summarized as specified by the Agreement Summary Sheet clearly stating conditions and requirements.

- Not engage in any activity that is, or appears to be, in conflict with local and/or international laws.

Resource Development

Scope

The policy and procedures included in this document are applicable to all employees involved with resource development activities with no exceptions, unless otherwise noted in writing by the Foundation's Executive Director and approved by the Board of Trustees (BoT). General description of the roles and responsibilities of those involved in the resource development process is listed below. Detailed descriptions and a step by step process flowchart are available in Appendix I part (1) and (2).

Approval

As the Governing body of the Foundation, the BoT must approve all relations with funding partners including:

- Any partnerships or potential partnerships, prior to any overtures or negotiations being conducted with potential partners;

- New partnerships or offers to the Foundation by external parties prior to taking active steps in negotiating or forming the alliance;

- The BoT must approve any resource development event or activity.

Tasks and Responsibilities

- ✓ *Executive Director Responsibilities*

  - Keep the Board of Trustees informed of all new partnerships or potential partnerships whether initiated by the Foundation or by external parties and requests approvals;
  - Ensure that all newly formed partnerships are in line with the Foundation's three core programmes;
  - Request the DCRD to prepare the proposal;
  - Request the Programme Director to prepare the budget in coordination with the Director of Finance;
  - Carry out proposal final review;
  - Supervise proposal amendments based on requests from potential funding partner(s);
  - Advise on contacting potential funding partners;
  - Sign official letters and contractual agreements with funding partners;

- ✓ *Director of Finance Responsibilities*

  - Ensure that all resource development transactions, accounting and reporting are recorded timely and accurately;

  - Review all newly formed partnerships project's budget and ensure compliance with the Foundation's financial policies and procedures;

  - Ensure that the Foundation is in compliance with the financial terms and conditions as per terms of signed contracts.

✓ *Programme Director Responsibilities*

- Develop new ideas to expand current activities;
- Keep the Director of Communication and Resource Development and the Executive Director fully informed on all partnership attempts;
- Engage along with the Executive Director and the DCRD in partnership development from the early stages;
- Prepare the project concept paper; (see appendix II part 2, writing a concept paper).
- Provide the DCRD with timely and accurate information needed for the development of project proposals;
- Prepare the project proposals budgets in coordination with the Director of Finance
- Design proposals and engage in their development;
- Participate in identifying potential funding partners;
- Prepare project progress reports;
- Assure compliance to signed agreements as per the Agreement Summary Sheet.

✓ *Director of Communication and Resource Development (DCRD) Responsibilities*

- Lead the process of proposal development in coordination with Programme Director and assigned programme staff;

- Conduct an identification study and develop a database of potential funding partners, and an annual calendar of key prospects, calls for proposals and applications information. Review and develop the database on an annual basis. Participate in approaching potential partners;

- Develop and manage the implementation of the Foundation's resource development strategy in coordination with the Executive Director, Programme Directors, and the Director of Finance;

- Prepare and implement the Foundation's annual resource development work plan from local, regional and international sources;

- Prepare Agreement Summary Sheet.

✓ *Programme Staff Responsibilities*

Program staff refers to the Foundation's employees under the three programs, regardless of their location on the salary scale.

- Participate in developing ideas for new projects;
- Participate in preparing concept papers;
- Participate in project design;
- Participate in preparing project budget;
- Successful and timely implementation of project activities;
- Participate in preparing funding partner reports;
- Participate in proposal design and development.

Sources of Funds

The Foundation seeks to cement existing co-funding partnerships and expand its pool of external co-funding partners through identifying new sources. The Foundation will approach Palestinian, Arab and international funding parties and individuals either through direct applications or through the Foundation's donation appeals on its website or via other means.

Al-Qattan Family
Al Qattan family supports the Foundation's administrative functions and the majority of its programme operations.

Internal Sources
Sources of internal revenues: these are revenues from sales and services including book sales, rentals of spaces and equipments, accumulative interest rates, and training services fees.

External Sources
Following are the main sources of external funding for the Foundation:

1. **Governmental and Non-Governmental Aid Agencies**

   Based on mutual agreement on a solicited proposal, the Foundation may enter into a contractual co-funding relationship with a governmental or non-governmental aid agency and/or their representatives. These contracts may comprise:
   a. Long or short-term partnerships; and
   b. In-kind donations.

2. **Corporations**

   The concept of social responsibility motivates corporations to donate cash or services to charitable and developmental organizations. The Foundation may approach Palestinian, Arab, and international companies (with social responsibility programmes which relate to its own) to establish a contractual relationship company that involves:
   a. Long or short-term partnerships;
   b. In-kind donations ; and,
   c. Commercial sponsorships.

3. **Individuals**
   The Foundation welcomes unconditional monetary and in-kind donations from Palestinian, Arab and international individuals who share its vision, mission, values and objectives.

Resource Development module

1. **Partnership development**
   The Foundation seeks to create new partnerships and develop existing partnership with the Foundation's current and/or potential funding partners through:

a. Extension and/ or expansion of current projects;
b. Proposing new projects.

See appendix II part (1): proposal writing guidelines

2. **Internal revenues**

Sources of internal revenues: these are revenues from sales and services including selling books, rentals of spaces and equipments, cumulative interest rates, and training services fees.

3. **Holding resource development events and campaigns**

The foundation sets a financial goal as well as a tangible element for each campaign/event. Such activities may include fundraising receptions, special events, and selling of merchandise.

See appendix II part (3): guidelines, roles and responsibilities

4. **Internet-based resource development**

What is special about this type of resource development is that appeals can be created and directed almost instantly, and it enables the Foundation to reach a more diverse pool of funding partners including individuals and institutions. This can be done in two ways:

a. Through the Foundation's website or social media outlets.
b. Promotional ads on other websites (partners, networks, magazines, etc).

See appendix II part (4): guidelines, roles and responsibilities

Appendices

Appendix I: Guidelines for RD Process

Part (1): Detailed description of the roles and responsibilities of those involved in the resource development process.

Part (2): A step by step process flowchart of the resource development process.

Appendix II: Guidelines for RD Modules

Part (1): Proposal Writing Guidelines
Part (2): Writing a Concept Paper
Part (3): RD Event Guidelines, Roles and Responsibilities
Part (4): Internet-Based RD: Guidelines, Roles and Responsibilities

Appendix I: Guidelines for RD Process

Part (1): Detailed description of the roles and responsibilities of those involved in the resource
development process.

➤ **Development of proposals**

1. The idea:
   Ideas for new projects or programmes are developed at the Foundation's operational
   level, i.e. the three main programmes CAP, QCC, and QCERD, and it is the
   responsibility of the programme directors and the programme staff to come up with
   new project ideas. However, the Executive Director, DCRD, and the BoT may
   suggest ideas for new projects.
   Proposals may also be developed based on an existing project. In this case, the new
   proposal is developed based on the existing project proposal with changes where
   applicable.

2. synthesize the idea:
   The project idea is then synthesized between the Programme Director(s), programme
   staff, the Executive Director and the Director of Communications and Resource
   Development.

3. Present the idea to the Management Committee:
   Once the project idea is clear and mature, it is the responsibility of the Executive
   Director, the Program Director and the DCRD to present the idea to the Management
   Committee for discussion and feedback.
   Project extensions and/ or proposals developed based on ideas from existing or
   former projects do not need to be presented to the Management Committee.

4. Concept note:
   Once the project idea is clear and mature, it is the responsibility of the Program
   Director and the program staff to write a concept note. This note is to be reviewed
   and agreed upon between the ED, DoF, PD, and DCRD before the ED submits it to
   the BoT for approval.

5. Locating funding source(s):
   Once the concept note is approved by the BoT, it is the responsibility of the DCRD
   and the ED to identify potential funding sources. However, the PD and BoT may help
   identify or suggest potential funding partners. It is the responsibility of the Executive
   Director to get BoT approval on any potential funding partner(s) before the proposal
   development process starts.

6. Present the idea to potential funding partner(s):
   The Executive Director, Director of Communications and Resource Development and
   Programme Director(s) are responsible for presenting new project ideas to potential
   funding partners.

7. Preparation of proposal and budget:
   The Executive Director delegates the proposal writing task to the DCRD who will
   work together with the PD and PS to design the project and build its components.
   The DCRD writes the proposal taking into account deadlines and other funding

partner requirements. The DCRD consults regularly with the PD while writing the proposal.

The PS and PD then work closely with the DoF to prepare the project's detailed budget in accordance with the proposal and the Foundation Chart of Accounts.

8. Final review of proposal and budget:
   The ED reviews the final draft of the proposal before submitting to donors.

9. Writing and signing of cover letter: the letter is written and signed by the ED.

10. Submittal of the proposal:
    The ED and DCRD are responsible for successful and timely submittal of proposals. The ED submits proposals (narrative + budget + cover letter) and copies the DCRD, PD(s) and DoF.

➢ **Signing of agreement(s) with funding partner(s)**

Approval of a proposal is followed by signing of a contractual agreement between the Foundation and the funding partner(s). Agreements are signed by the Executive Director.

➢ **Preparation of an Agreement Summary Sheet**

The DCRD is responsible for the preparation of a checklist for compliance of all funding partner agreements and contracts with reference to the signed agreements between the Foundation and the funding partner(s). The ED reviews and approves the checklist and returns it to the DCRD to present and discuss with the PD and the DoF. This checklist will be utilized by the PD, PS, DoF, and DCRD to assure compliance of all financial and operational acts and procedures, reports, deadlines, and any other requirements.

➢ **Project implementation**

The quality and timely implementation of projects is the responsibility of the PDs. They are also responsible for the preparation of funding partner reports and their presentation to the DCRD who will polish them and ensure their compliance with signed agreements (as described above).

➢ **Project progress reports**
The programme staff and programme director are responsible for the preparation of progress reports. They submit these to the DCRD for editing and compliance checks, and work with the Director of Finance to prepare the project's financial report. The Executive Director reviews and approves all funding partner narrative and financial reports before submitting to funding partners, copying the DCRD and the PD(s).

➢ **Evaluation**
This is the responsibility of the PD and PS. The ED may be involved in the evaluation process if the need arises.

> **External auditing**

The BoT appoints the external auditing firm and informs the ED who communicates with the funding partner to get their concurrence on the auditing firm. Once the concurrence is received, it is the responsibility of the ED to send an appointment letter to the external auditor with copy to the DoF and the PD, who are responsible to prepare the auditing requirements as specified by the external auditor.

Part (2): A step by step process flowchart of the resource development process

		Roles and Responsibilities	
	Board of Trustees (BoT)	Program Staff (PS)	
	Program Director (PD)	Management Committees (MC)	
	Executive Director (ED)	Director of Communications and Resource Development (DCRD)	
	Director of Finance (DoF)	Editor, Publications & Media Coordinator (EPMC)	

	TASK	RESPONSIBILITY	APPROVAL
(1)	**Project idea (new project or building on former or existing project)**	**PD + PS** (main responsibility) **ED + DCRD + BoT** (may suggest ideas)	
(2)	**Synthesize the idea internally**	**PD + PS + ED + DCRD** *	
(3)	**Present the idea to MC**	**ED + DCRD + PD** *	
(4)	**Concept paper**	**PD + PS:** writing of the concept paper **DoF + ED + DCRD: review &** concurrence	**BoT**
(5)	**Locating funding source(s)**	**ED + DCRD** (main responsibility) **PD + BoT** (may help but it is not their responsibility)	**BoT**
(6)	**Present idea to potential donor(s)**	**ED + DCRD + PD**	
(7)	**Proposal & budget**	**PD + PS + DCRD:** project design **DCRD:** proposal writing **EPMC:** editing of Arabic proposals **PD + PS:** budget in coordination with the DoF	
(8)	**Proposal final review**	**ED**	
(9)	**Cover letter**	**ED:** writing of cover letter	
(10)	**Submit to potential donor(s)** (proposal +budget + cover letter)	**ED** with CC to **DCRD + DoF + PD**	
(11)	**Signing of agreement(s)**	**ED**	
(12)	**Agreement Summery Sheet**	**DCRD:** preparation **DoF + PD:** concurrence	**ED**
(13)	**Project implementation**	**PD + PS:** successful & timely implementation **PD + PS:** adherence to budget **DoF:** monitor adherence to budget	
(14)	**Progress reports**	**PD + PS:** preparation **DoF:** financial reporting **DCRD:** polishing & compliance	**ED**
Evaluation		**PD + PS:** (main responsibility) **ED** (may participate if the need arises)	

External Auditing[1]	**BoT:** appointment of external auditor **ED:** funding partner's concurrence **ED:** auditor's letter of appointment **with CC to PD + DoF** **PD + DoF:** preparation of audit requirements	

[1] The Foundation may also carry out internal auditing

* In the case of solicited proposals (usually close deadlines), it may be difficult to go through steps 2 and 3 in this chart. Provided that the project to be proposed in a solicited proposal falls perfectly into the AMQF's core programs, step (2) may be skipped meaning that the project idea is developed in step (1) by the program(s). Due to the same time restrictions, instead of presenting the idea to the MC committee for discussion, MC committee is only informed.

However, whenever the Foundation is planning to make critical decisions to expand its intervention in new directions within one of its programs or among more than one program, enough time must be given to discuss and develop ideas. In this case, all the subsequent steps (1-14) in this chart must be followed.

Appendix II: Guidelines on RD Modules

Part (1): Proposal Writing Guidelines

- **Cover Letter**

It is critical for proposals to have a well written cover letter. The cover letter introduces the Foundation and specifically states what is being requested. It should not be a regurgitation of what is in the proposal itself. The cover letter should be signed by the Executive Director and should:

- Address the assigned officer at the funding partner agency;
- Include the title and gist of proposed work;
- Include the grant amount requested ; and,
- Include the proposed start and end dates.

- **Executive Summary**

The Executive Summary must be comprehensive yet concise. It must immediately attract the funding partner's attention, while providing an overview of the activity/project and of what the Foundation is asking for, and why.

- **Introduction**

Presents and summarizes the problem you intend to solve and prepares for presenting the solution in the next section (project rationale/ problem statement).

- **Project Rationale/ problem Statement**

Also called the problem statement. It must clearly articulate the need the proposal is addressing, and must do it in a reader-friendly manner. The statement of need explains why the issue is important, and why the Foundation is the right organization to provide a solution (capability statement). Include background research, such as historical data, as well as stories that illustrate the need the proposal addresses.

- **Brief Description of Project**

Project name
State the full name of the project as well as acronym (if any).

Goals and Objectives

State what the Foundation is hoping to achieve, including:
a. General objective: states the overall development or aid aim towards which your more specific project purpose should contribute. Important things to remember about the general objective or goal are:

- You cannot achieve the general objective or goal on your own as a project or organisation. Your project will make a contribution towards achieving it.

- The general objective or goal provides a benchmark against which the success of your project and that of others with a similar purpose can be measured.

- The general objective or goal must be compatible with your organisation's mission statement and with the mission of the donor to whom you are applying for funds.

- It will usually take longer to achieve the general objective or goal than to achieve the specific project objective(s).

- The general objective should be SMART i.e. Specific, Measurable, Achievable, Realistic, and Timed.

b. Project purpose or specific objective: is usually something that your project should be able to achieve through its work. It is a result that should be possible in the time specified, and it is the strategy the organisation and the project believe will address a particular problem in a particular area, making a contribution to achieving the general objective or goal. A project may have more than one specific purpose/objective but it is best to focus, in your proposal, on the most important one. Some important things to remember about the project purpose or specific objective:

- The more specific the project purpose is, the easier it will be to design a process for achieving it.

- The achievement of the project purpose is the result by which the project will be judged so it must be possible to achieve.

- All objectives should be SMART i.e. Specific, Measurable, Achievable, Realistic, and Timed.

- **Results/ outputs**
  What are the concrete outputs envisaged to achieve the specific objectives? What are the envisaged effects and benefits of the project? What improvements and changes will be produced by the project?

- **Activities**
  What are the key activities to be carried out and in what sequence in order to produce the expected results?

- **Target Group(s)**
  Define groups targeted (1) directly and (2) indirectly in the project. List numbers, geographic locations, age groups, gender information, etc.

- **Beneficiaries**
  Define groups that will benefit (1) directly and (2) indirectly from the project. List numbers, geographic locations, age groups, gender information, etc.

- **Partners**
  Provide a list of partner organizations or entities in the specific project and define their roles.

- **Location**
  In which geographic locations will the project be implemented?

- **Project Duration**
  When will the various activities and outputs happen? Provide exact dates.

- **Methodology**

The methodology section of the proposal informs the funding partners of how the Foundation will accomplish the project's stated objectives. Therefore, it must be clear, concise, feasible and logical.

- **Management and Human Resources**
This section informs the funding partner about the roles and qualifications of staff entitled to implement the project. This includes full-time and part-time employees in addition to consultants and volunteers. It is necessary to provide an institutional structure of all human resources involved in the project.

- **Implementation Plan/ Plan of Action**
The implementation plan is presented by means of a calendar that shows when the project activities will take place see the table below. It should be sufficiently detailed in order to give an accurate idea about the preparation and implementation phases for each activity. In terms of projects for more than one year, the calendar must be presented in details for the first year at

least. If activity details for the coming years are hard to determine at the proposal writing time, the Foundation could provide details for the main expected activities. A more detailed plan of action could be presented at the time of reporting on the previous phase.

- **Evaluation**

Action Item	Year1				Year2				Year3			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Activity one	██	██										
Activity two	██	██	██	██	██	██	██	██	██	██	██	██
Activity three		██		██		██		██		██	██	

The evaluation section is where the Foundation explicitly states how it will measure the project's results. The funding partners must know how the project accomplishments will be objectively measured, and that there will be hard evidence that their funds were effectively used. Therefore, clearly state what records the Foundation will keep and/or what data will be collected. Data may be quantitative, qualitative, or a combination.

- **Project Sustainability**

In the sustainability section (if applicable), the Foundation must state future plans for the project, after the donations requested have been used up. In other words, the Foundation must inform the funding partners how it will ensure the continuation of the project or some of its components in the future, and/or how the project will sustain itself after the project period ends.

- **Foundation Information**

The Foundation information section is where detailed information is provided about the Foundation. This section must include:

- The Foundation history and background;
- Values and Mission statements;
- Description of its programmes;
- Beneficiaries;
- Up to date track record; and,
- The Foundation's role in the development of the community.

- **Budget**

In the budget section, the Foundation informs funding partners how much the project will cost, and provide an explanation of each expense. The budget must include:

- Human resource expenses;
- Activities expenses;
- Administrative expenses;
- Any expected income—either earned or contributed; and,
- Auditing and evaluation costs.

- **Logical Framework**

The Logical Framework (LF or Logframe) is a highly effective planning tool for defining inputs, outputs, timetables, success assumptions and performance indicators. It provides a structure for specifying the components of an activity and for relating them to one another logically. It also helps to identify the place of a project within an overall programme or a national system. Its usefulness stems from its ability to incorporate the full range of views of all stakeholders of a project.

This analysis does not take place only once during the project start-up but throughout the course of monitoring and evaluation, keeping in mind that the logframe is both adjustable and applicable to long-term project management. The framework or structure behind the LogFRAME is a 4x4 matrix. That is, four rows and four columns. See logframe matrix on page 22 and reading logframes on page 23.

Note: It is useful to distinguish between the two terms: the Logical Framework Approach (LFA) and Logical Framework (LF or Logframe). They are sometimes confused. The LogFrame is a document. The Logical Framework Approach is a management tool mainly used in the design, monitoring and evaluation of developmental projects. It is also widely known as Goal Oriented Project Planning (GOPP) or Objectives Oriented Project Planning (OOPP).

Logical Framework Matrix (Logframe Matrix)

	Logic of intervention (narrative summery)	Objectively verifiable indicators	Sources and means of verification	Important assumptions
Overall objective	What is the overall broader objective to which the project will contribute?	What are the key indicators related to the overall objective?	What are the sources of information for these indicators?	
Specific objective(s)	What are the specific objectives which the project shall achieve?	What are the quantitative or qualitative indicators showing whether and to what extent the project's specific objectives are achieved?	What are the sources of information that exist or can be collected? What are the methods required to get this information?	What are the factors and conditions not under the direct control of the project which are necessary to achieve these objectives? What risks have to be considered?
Expected results	What are the concrete outputs envisaged to achieve the specific objectives? What are the envisaged effects and benefits of the project? What improvements and changes will be produced by the project?	What are the indicators to measure whether and to what extent the project achieves the envisaged results and effects?	What are the sources of information for these indicators?	What external factors and conditions must be realised to obtain the expected outputs and results on schedule?
Activities	What are the key activities to be carried out and in what sequence in order to produce the expected results?	Means: What are the means required to implement these activities, eg personnel, equipment, training, studies, supplies, operational facilities, etc	What are the sources of information about project progress?	What preconditions are required before the project starts? What conditions outside of the project's direct control have to be present for the implementation of the planned activities?

Reading a Logframe

A logframe is read from bottom to top to analyze the coherence of its arguments. For example, the linkages between the components of the matrix would be read as follows:

1. If activities are implemented, and the relevant assumptions are valid, then the project will achieve the results/outputs.
2. If results/outputs are achieved and the related assumption remains valid, the project will achieve its objective(s). If the objective(s) is achieved and the related assumption holds then the overall objective is achieved.

	Narrative summary			Important assumptions
Overall objective		**then**		
Specific objective(s)	**if**	**then**		**and**
Results/Outputs	**if**	**then**		**and**
Activities	**if**			**and**

Part (2): Writing a Concept Paper

It is the responsibility of the Program Director to prepare a concept paper that captures the essence of the project proposal. The main difference between a concept paper and a proposal is that concept papers are much shorter and do not contain detailed budgets or implementation plans. Concept papers should, however, include a staffing plan (if needed) and an estimate of the funding required, and a general timeframe for completion of those tasks and the project as a whole.

The following format is recommended for concept papers:

2. **Abstract**
   A comprehensive yet concise summary of project that provides an overview of the project and of what the Foundation is asking for, and why.

3. **Project narrative**
   a. Problem statement: also called the statement of need. It explains why the issue is important and includes background research, data, as well as stories that illustrate the need.

   b. General objective: states the overall development or aid aim towards which your more specific project purpose should contribute. Important things to remember about the general objective or goal are:

   - You cannot achieve the general objective or goal on your own as a project or organisation. Your project will make a contribution towards achieving it.

   - The general objective or goal provides a benchmark against which the success of your project and that of others with a similar purpose can be measured.

   - The general objective or goal must be compatible with your organisation's mission statement and with the mission of the donor to whom you are applying for funds.

   - It will usually take longer to achieve the general objective or goal than to achieve the specific project objective(s).

   - The general objective should be SMART i.e. Specific, Measurable, Achievable, Realistic, and Timed.

   c. Project purpose or specific objective: is usually something that your project should be able to achieve through its work. It is a result that should be possible in the time specified, and it is the strategy the organisation and the project believe will address a particular problem in a particular area, making a contribution to achieving the general objective or goal. A project may have more than one specific purpose/objective but it is best to focus, in your proposal, on the most important one. Some important things to remember about the project purpose or specific objective:

- The more specific the project purpose is, the easier it will be to design a process for achieving it.

- The achievement of the project purpose is the result by which the project will be judged so it must be possible to achieve.

- All objectives should be SMART i.e. Specific, Measurable, Achievable, Realistic, and Timed.

d. Process:

Designing the process means planning how the Foundation is going to achieve the project purpose. The process is the step-by-step journey that will take you to the achievement of your project purpose. Designing the process means answering the following questions:

1. What will be done? (Activities)
2. Where will the Foundation do it? [Location(s)]
3. How will the Foundation do it? (Methodology)
4. Who will be involved? (Target groups, beneficiaries, and partners)
5. What outputs will there be? (Outputs or results)
6. When will the various activities and outputs happen? (Project period)
7. What resources will be needed to carry out the activities? (Financial and human recourses)

Part (3): RD Event Guidelines, Roles and Responsibilities

Coming up with ideas for resource development events is the responsibility of the DRCR and the Executive Director. However, the BoT and Programme Directors may suggest such events. To have successful resource development events, the Foundation must ensure the following key planning areas are discussed prior to commencing with event activities:

➢ Define the cause. Clearly state the fundraising event goals and determine which programme and activity (if possible) will benefit from the funds raised. This is done by the Management Committee (MC) and then presented to the BoT for approval.

➢ Decide on the type of fundraising event. In consultation with the BoT, the MC should plan the **type**, **location/venue** and **date** of the fundraising event. During the event planning phase the areas listed below need to be thoroughly discussed:

    ✓ **Type:** ensure the event activity is appealing to the target audiences;

    ✓ **Location/Venue:** ensure that the location/venue is easily accessible, secure and is suitable to the audience's social status and life style. Furthermore, reserve the venue as far in advance as possible, and ask for a non-profit organizations discount. Determine the need for travel insurance.

    ✓ **Date:** choose a date far enough in advance to give the Foundation and the audience ample time to prepare. Furthermore, be aware of conflicting local, national and/or international events, as well as holidays.

➢ Get help on administrative and logistic issues.
    o Involve the administrative officer(s) and staff to take care of administrative responsibilities such as sending invitations, online updates, and reservations.
    o Put out a call for volunteers if needed. Delegate carefully, creating committees and subcommittees if the event size calls for it. Hold periodic meetings to monitor the preparations progress.

➢ Set a budget. Draw up a budget that will keep operating costs at a minimum. Estimate attendance, venue rental, cost of accommodation (if any), food and beverages, refreshments, printing, mailing expenses, consultants and so on. Set the cost of expenses per person and then the ticket prices (if tickets are to be sold). It is necessary to involve the DoF to decide on budget.

➢ Secure a key speaker or choose honoree. Choose someone who has a relationship with the Foundation, or someone who will add an element of glamour or urgency to the event. Consider a high-profile businessperson, political, social, academic figure or a member of the BoT. Ensure that the name of the key speaker is included on the invitation.

Part (4): Internet-Based RD: Guidelines, Roles and Responsibilities

In order to develop resources online, the Foundation should:

- Subsequent to the approval of the BoT, create an online fundraising tool. This tool must be:

    - Secure and reliable;

    - Able to take credit card or bank accounts information;

    - Able to gather donors' personal data;

    - Able to issue acknowledgment letters upon the successful completion of the donation process;

    - Have a flexible reporting mechanism.

- Find a local or international (UK) company to handle the online contributions collection process;

- Obtain the BoT approval for each campaign prior to using the online fund raising method;

The DCRD and the ED are responsible for developing online resource development initiatives. The implementation is the responsibility of the DRCD and the IT Specialist in close coordination with the ED who keeps the BoT informed on latest plans and developments.