



GUIDELINES FOR ICFC PROJECT AGENTS

CONTENTS:

1.0 Agency relationship	p. 1
2.0 Project Agreements	p. 1
3.0 Payments	p. 1
4.0 Flexibility in Work Plan	p. 1
5.0 Progress and Final Reports	p. 1
5.1 Deadlines and email submission	p. 1
5.2 Format and content	p. 1
5.3 Photos	p. 2
5.4 Updates between Reporting Deadlines	p. 2
6.0 Project Budgets with multiple funders	p. 2
7.0 Expense Reports	p. 2
8.0 Email communications	p. 3
9.0 Acknowledgment	p. 3
Appendix A: Template for Progress and Final Reports	p. 3
Appendix B: Expense Cover Page	p. 4
Appendix C: Expense Categories for Expense Reports	p. 5

Note: this guide is found online at <http://www.icfcanda.org/guide.shtml>

GUIDELINES FOR ICFC PROJECT AGENTS

1.0 Agency relationship

ICFC partners with other NGOs and individuals in carrying out its international conservation work.

This relationship is not one of a donor or granting organization and recipient group. ICFC is involved in planning, managing and overseeing each project in proportion to our financial contribution to the project relative to that of other funders.

2.0 Project Agreements

Project agreements (“Agency Agreements”) between ICFC and our local project partners (“Agents”; also called “field partners”) are legally binding contracts setting out the details of conservation projects to be carried out by project partners on behalf of ICFC.

Project agreements are created in consultation with project partners and are specific to each project. Agreements include the following components:

- Goal and objectives
- Time frame
- Schedule of reporting (progress reports; final report)
- Schedule of payments (to correspond with reporting schedule)
- Background
- Information on project personnel
- Work Plan (which may include time frame for various components)
- Budget

The schedule of reports and payments will be semi-annual or quarterly, unless otherwise agreed.

Currency is generally that preferred by the Agent, as agreed by ICFC.

3.0 Payments

We will notify you when we are about to send a wire payment to you. Afterward we will email you documentation of the wire transfer for your files.

Recipients in Brazil: you must be able to submit the necessary paperwork to your local bank branch within two days of our

initiating a wire transfer of funds from Canada. We will therefore confer with you about the timing of wire transfers.

4.0 Flexibility in Work Plan

During the course of a project, priorities can shift or the situation can change in regard to carrying out planned activities. ICFC's policy is to remain flexible and adjust work plans as needed to best achieve the project goal. Such changes must be discussed between the project partner and ICFC.

Please inform ICFC promptly of any developments that make it necessary or desirable to significantly alter the work plan — Do not wait until the next reporting deadline to inform us of changes.

Please also advise ICFC of pending significant changes to personnel or budgeted expenses.

5.0 Progress and Final Reports

5.1 Deadlines and email submission:

Progress and final reports are due by the dates specified in the agency agreement. Reports can be sent a week or two earlier, especially if prompt payment is desired on the scheduled cash transfer dates.

Reports should be emailed to the respective ICFC staff person/people (we will tell you who they are) and copied to Lambert@ICFCanada.org and Welch@ICFCanada.org,

Please let us know if a report will be late, and at minimum provide a brief email update by the deadline.

5.2 Format and content:

Please use the template provided in Appendix A as guidance for reports. Progress reports and final reports do not need to be long or take a lot of time to prepare. Reports should begin with a point-form a synopsis that includes:

- what progress has been made toward project objectives;
- which aspects of the work plan are completed or in progress and which have not been undertaken (and why)

- what significant unexpected good things happened, if any, during the reporting period.
- what significant unexpected bad things happened, if any, during the reporting period.

In *year-end and project-end reports*, we would also like to see a clear statement of what the conservation outcomes have been.

Following the report synopsis, the balance of the report can give a more detailed narrative.

5.3 Photos:

We are always interested in receiving new photos related to the project — sometimes ‘a picture is worth a thousand words’. Photos are very helpful in raising additional support for a project. They also help us get a better sense of the project.

We will assume that any photos shared with ICFC may be used in promotional materials such as the ICFC website and annual report. Please let us know if for any reason specific photos should not be shared with the public. We will name the project partner in photo credits wherever used; if you’d like to provide the name of photographer, we can credit them as well.

Images in reports tend to be low resolution and these are fine for website images. We may request high resolution images of certain photos to use in printed publications.

5.4 Updates between Reporting Deadlines:

If any unexpected situation arises (good or bad) that significantly impacts the work plan or the project more broadly, ***please keep us updated as soon as possible rather than waiting until the next reporting deadline.***

We also welcome any communication from project partners between reports with news related to the project or to conservation generally – you are our experts in the field and we value any ideas and input you have to share.

ICFC staff can always be available by email or to meet via Skype if there are issues to discuss between reporting periods.

6. Project budgets with multiple funders

When there are multiple funders, our policy is to specify on our website and in our publications the percentage of the total project support contributed by ICFC and to name the other funders. Therefore, project budgets should be organized in

columns for different funders so that we can see where our share is going in relation to the total project funding.

7. Expense reports

Expense reports should be emailed to Laurie at Havinga@ICFCCanada.org and copied to Tom at Welch@ICFCCanada.org.

Laurie, ICFC’s office manager, will send you an expense (Excel) cover page (Appendix B) about a week in advance of when reports are due. This summarizes what funds were carried forward, sent and received, and the total expenses included in this report. Some of this is filled out by us, and some by you.

Expense reports must also provide itemized expense information showing how much was spent on what. Please clearly indicate the time period covered at the top of all expense reports. ***Please give expenses for the period following your last expense report*** (rather than for the whole year, for example, when you submitted a report six months earlier).

Receipts should be available for us to view at our request. (Please make reasonable efforts to obtain receipts, but we understand that for some minor expenditures it may not be possible.) With the purchase of any equipment, vehicle, boat, building structure, etc. costing over US\$500, please send a photographic image of the item with the expense report (or after purchase).

It is very helpful, but not required, if you use ICFC's expense categories (Appendix C), plus any additional "other" categories that you like.

8. Email communications

It is very helpful for email "Subject" headers to indicate clearly what the message is about. Examples: "comments on 2nd progress report"; "question on budget item". Please update the Subject header when a back-and-forth conversation changes topic.

9. Acknowledgment

ICFC and our Agent should each acknowledge the other in any publications or promotional materials concerning the project. This includes reports, magazine and newspaper articles, peer-reviewed journal publications, web pages, and press releases. Please ask us for our logo for use where appropriate (signage, website, reports, etc.).



APPENDIX A: Template for Progress and Final Reports

1. Summary:

Please briefly (within one page) answer the following questions in point form:

- *What progress has been made toward project objectives?*
- *Which work plan items have been completed or are in progress and which have not been undertaken (and why)?*
- *What significant unexpected things (good or bad) happened during the reporting period?*

For year-end reports, please also briefly describe what the conservation outcomes have been by answering whichever of the following two questions applies:

(1) What has been the outcome of the project in terms of the conservation status of the land/species/ecosystem(s) (whichever applies) compared with what it would have been if the project had not taken place.

— or —

(2) What ground work has been accomplished that is expected to lead to conservation outcomes as described in #1.

2. Itemized Project Workplan Checklist:

	DESCRIPTION IN WORK PLAN OUTLINE	STATUS	COMMENTS
Component 1	Copy each component as stated in the agency agreement	Example: Complete; In Progress; Modified; Delayed, etc.	Brief remarks, if any
Component 2			
Component 3			
Component 4			
Component 5			

3. Report narrative:

The balance of the report can give a more detailed narrative, describing key project activities and any observations. If the report is in a language other than English and includes images or tables, it is very helpful to have the tables and images on separate pages from the text of the report.

APPENDIX B: This expense cover page will be sent to you as an Excel file a week in advance of the due date. The table will be partially filled out by us and has formulae that will make automatic calculations.

Expense Cover Page (example)

Project: Passenger Pigeon Conservation Program
Partner: Wallace Conservation Society
Dates Covered: 1 Jan. to 30 June 2014

Date		Description	Currency	Amt Sent by ICFC	Amount
Dec 31, 2013	(1)	Balance Forward			244
		<i>Advance Sent</i>		<i>15,000.00</i>	
	(2)	Advance Received		<i>Office Use</i>	15,000.00
		<i>Difference: Sent vs Received</i>		<i>0.00</i>	10.00
				<i>Office Use</i>	
	(3)	Amount Available = (1)+(2)			15,244.00
	(4)	Field Expenses Submitted with this report			14,842.00
	(5)	Balance Forward to Next Period = (3)-(4)			402.00

Notes:

Date submitted: 6 July 2014

Submitted by: Mortimer Sneed

APPENDIX C: Expense Categories for Expense Reports

(this is available as an Excel file on our website at <http://www.icfcanada.org/guide.shtml#expense>)

New code	Expense category
6-1100	Accounting Fees
6-1120	Advertising & Message Promotion
6-1140	Bank - Fees
6-1160	Bank - credit card & PayPal Fees
6-1200	Cleaning & Cleaning Supplies
6-1220	Client Development & Hospitality
6-1240	Capital Items - Vehicles, etc.
6-1260	Committees & Local Meetings
6-1280	Communications Equipment
6-1300	Computer Expenses
6-1320	Conferences & Training
6-1340	Consultants & Subcontractors
6-1360	Courier & Postage
6-1400	Dues / Fees / Licenses
6-1420	Field Construction
6-1440	General Supplies (miscellaneous)
6-1460	Insurance
6-1500	Internships & Educational Programs
6-1520	Land Purchase Expense
6-1540	Legal
6-1560	Office Supplies
6-2010	Salaries & Wages
6-2060	Employee Benefits
6-4000	Rent
6-4010	Repair & Maintenance - Office & Field Station
6-4030	Repair & Maintenance - Property & Equipment
6-4040	Security & Boundary Enforcement
6-4050	Special Village Projects
6-4060	Tools & Equipment
6-5010	Travel: Airfare
6-5020	Travel: Boat
6-5030	Travel: Fuel - Vehicles & Boats
6-5040	Travel: Local Field Transportation
6-5050	Travel; : Meals & Lodging
6-5060	Travel: Vehicles / Horses / Other
6-6010	Utilities: Oil & Gas
6-6020	Utilities: Power
6-6030	Utilities: Telephone & Internet
6-6040	Utilities: Water