



Program Design, Funding & Management Policy

Policy & Procedure Owner	CEO Office	
Approved by	ERFA Board of Directors	
Date Approved	Date of Last Revision	Next Review
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Abbreviations

ACFID	Australian Council for International Development
DFAT	Australian Department of Foreign Affairs and Trade
ERFA	Edmund Rice Foundation Australia
ERFA representatives	Staff members, contractors and volunteers of ERFA
Member	A not-for-profit organisation that has obtained accreditation with ACFID
Partner	Any organisation which has an MOU / Contract with / or receives funding from ERFA

Contact information

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Related policies and/or legislation

- Anti-Corruption & Anti-Fraud Policy
- Child Protection Policy
- Counter-Terrorism Policy
- Diversity & Inclusiveness Policy
- ERFA Risk Management Framework
- Safety & Security Policy
- Gender Equality & Female Empowerment Policy
- Non-Developmental Activity Policy
- Prevention of Sexual Exploitation, Abuse & Harassment Policy
- Privacy Policy
- Sustainable Development Policy
- Whistleblowing Policy

Related forms

The following forms are related to the policy and are available online at:

<https://erf.org.au/policies>

- ERFA form for collection of stories/images
- Image Use Consent Form

Compliance

Failure by ERFA funded partners to fully comply with any aspect of this policy could result in immediate termination of funding.

Legal definitions

Edmund Rice Foundation (Australia) is a company limited by guarantee. The objects of the company are set out in clause 3 of ERFA's constitution. Clause 3 (f) reads as follows:

To develop partnerships with overseas aid agencies or formal arrangements with other delivery agents related to the Company but resident in Developing Countries for the implementation of the objects in paragraph (a).

One of ERFA's roles is to act as trustee of the Edmund Rice Overseas Aid Fund.

Throughout its policies and official documentation ERFA uses the term **Partners** for those organisations with which it has formed alliances in developing countries for the receipt of overseas aid funding for the in-country delivery of education programs. Whilst ERFA has an active, engaged and qualitative role with these programs, working to build capacity and maximise the impact of best practice development outcomes, these are not partnerships in the legal sense. Rather they are alliances that ERFA has formed with in-country organisations with whom ERFA has communicated its vision, mission, values, policies and expectations with respect to sustainable development and whose own vision, mission, values, policies and development goals are congruent with those of ERFA. The in-country organisations implement the programs and ERFA supports them.

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1.0 Policy overview

The purpose of this policy is to outline Edmund Rice Foundation Australia's (ERFA) approach to the design, funding, monitoring and evaluation of the programs it supports. The policy also outlines reporting and accountability requirements with a view to ensuring the highest possible reporting and governance standards.

The Policy covers program design, funding eligibility criteria and ERFA's funding application and approval processes. It also outlines reporting and accountability requirements with a view to ensuring the highest possible reporting and governance standards. The Policy also covers ERFA's commitment to learning and continual improvement. ERFA considers it critical that all of its processes and procedures are transparent and accountable to all donors, funders and other stakeholders in order to assure them that all funding is being applied for maximum impact in line with best practice development principles.

ERFA recognises that:

- well-designed, effective and well-managed programs are critical to ERFA in achieving its objectives and mission and in seeing its vision realised
- clear guidelines on funding criteria, appraisal and process are essential in ensuring transparency for all stakeholders and facilitating maximum impact in line with best practice development principles
- well-designed, effective and well-managed programs are indicators of ERFA's own effectiveness, professionalism and commitment
- monitoring and evaluation are essential performance management practices for assessing and improving program effectiveness and impact

2.0 Edmund Rice Foundation (Australia)

2.1 Identity

ERFA is an international development organisation with a global footprint. ERFA's commitment is to supporting the education of the most vulnerable. Programs delivered through ERFA's support have a clear and deliberate focus on the education of people and their communities, to develop the life skills to change their own world and be a force for positive change around them. In partnership with others across the globe ERFA is seeking to support the UN Sustainable Development Goal Number 4: *Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.*

2.2 Vision

ERFA's vision is for access to quality education and lifelong learning opportunities for all, supporting empowered communities that determine their own futures.

2.3 Purpose

ERFA's purpose is to support the education of the most vulnerable. For ERFA, the best education represents lifelong learning where skills are imparted and applied, lessons learned and life skills mastered. ERFA's focus on education is not only in life changing education for children, but in skills such as financial literacy, farming, trades, health and human rights for adults. The link between education and empowered, self-sustaining and healthy individuals and communities is clear. The right education transforms and liberates lives, every day.

2.4 Core Functions of ERFA

The core functions of ERFA are to:

- Support local communities in developing countries on programs with a focus on lifelong learning, which are inclusive and empowering and which aim to result in local management and autonomy.
- Support programs in Australia for marginalised and disadvantaged groups and support the advancement of education for Australian youth.

- Partner with Australian supporters for impact and offer innovative opportunities for deep engagement between donors and the programs they support.
- Grow and diversify funding including seeking funding from the Australian government and corporate Australia.
- Build an efficient, effective and sustainable organisation committed to financial transparency and investing in the skills and expertise of staff and programs.

2.5 Status

ERFA is a company limited by guarantee under the Corporations Act 2001 (Commonwealth). The company registration number is ABN: 28 153 110 055 and it produces annual audited accounts and financial statements. The company is registered with the Australian Charities and Not-for-profits Commission (ACNC) and has charity tax concessions. The objects of the company are set out in Item 3 of ERFA's constitution (available online at <https://erf.org.au/wp-content/uploads/2010/08/ERFA-Constitution.pdf>).

ERFA acts as trustee for the following funds:

1. Edmund Rice Overseas Aid Fund – which provides funding for overseas development projects - ABN 85 413 988 107. This fund is registered with the Australian Charities and Not-for-profits Commission (ACNC). ERFA has “approved organisation” status from the Department of Foreign Affairs and Trade (DFAT) and consequently, under the Overseas Aid Gift Deduction Scheme (OAGDS), issues tax deductible receipts for donations made to this Fund to support approved overseas aid activities.
2. The Trustee for Edmund Rice Foundation Trust – which provides funding for other organisations with DGR status which are for the relief of poverty and disadvantage within Australia - ABN 37 665 490 818. This fund is registered with Australian Charities and Not-for-profits Commission (ACNC) and has charity tax concessions. It is endorsed as a Deductible Gift Recipient (DGR).

In addition, ERFA as a company in its own right (ABN: 28 153 110 055) provides funding for projects both overseas and within Australia and receives non-tax deductible donations and other income (such as event ticket sales, auctions and sponsorship) for that purpose.

Tax deductibility and OAGDS requirements

As Australian income tax deductibility is critical for successfully raising funds from Australian donors. ERFA regards compliance with OAGDS requirements as of the utmost importance. Accordingly:

1. ERFA operates on a not-for profit basis and money must not be distributed to members of the board or trustees of ERFA except as:
 - a. re-imburement for out-of pocket expenses incurred on behalf of ERFA, or
 - b. as proper remuneration for any administrative services provided.
2. Gifts and deductible contributions made to ERFA are kept separate from any other funds in separate bank accounts with clear accounting procedures are in place.
3. ERFA has an active deeper, engaged and qualitative role with the programs it supports beyond the provision of financial support (e.g. oversight and quality assurance).

3.0 Funding cycle

ERFA funds programs on an annual basis. Approved ERFA funding is for one (1) calendar year only, unless otherwise specified in the signed funding contract, and there is no guarantee of future funding.

ERFA's funding application period is open for two months in July and August of the year prior to funding.

4.0 Funding focus

ERFA gives priority to funding discrete education projects with a specific start and end date.

ERFA seeks and provides funding for education programs in the developing world and in Australia. ERFA's focus on education is not only in life changing education for children, but in every day skills such as financial literacy, farming, trades, health and human rights for adults.

ERFA program funding is for education programs in four (4) core areas:

- 1) Formal Education – programs delivering education in pre-schools, primary schools, secondary schools and vocational education/training.
- 2) Community Education - community education must be delivered to ensure effective community development (e.g. community health, sanitation, nutrition, livelihood training, language, etc).
- 3) Development Education – enables people to understand and participate in tackling the root causes of injustice and inequality. Key components are human rights, social justice, environmental education, gender education and inclusive education.
- 4) Education for Sustainable Development - promotes the development of the knowledge, skills, understanding, values and actions required to create a sustainable world, which ensures environmental protection and conservation, promotes social equity and encourages economic sustainability.

5.0 Eligibility for funding

For a funding application to be considered by ERFA it must:

- fall under one of the four (4) core funding areas listed in item 2 above
- align with ERFA's vision and purpose as detailed on page 1 of this Policy
- fully comply with all aspects of this Policy.

6.0 Eligible education programs

Eligible programs include those which provide:

- Education of staff to build capacity of delivery to program beneficiaries, for example training of medical staff, community health workers, teachers, etc
- Advocacy that raises awareness and educates on issues such as child rights and protection, peace building, environmental issues
- Capital projects that build sustainability in education facilities such as additional classrooms, trade centres, arts centres and ancillary infrastructure
- Educational resources and learning aids
- Equipment and machinery which supports delivery of education initiatives
- Feeding programs only where there is a direct ERFA-funded associated education component.

7.0 Ineligible programming

Programs which do not meet ERFA's funding eligibility criteria include those which are for the purpose of:

- Individual scholarships or tuition fees
- Wages of program owners
- Placement or tuition fees to third party institutions and/or providers
- Political activity or evangelism
- Welfare payments such as medical or emergency assistance for staff, volunteers or beneficiaries unless part of an approved emergency appeal
- More than 60% of a program's (organisation) indirect costs, including overheads, administrative costs, operational costs and indirect wages
- Feeding programs not grounded in an ERFA funded education project
- Programs or activities which are not education based such as medical services or medication

8.0 Project design processes and procedures

For ERFA, project design involves the identification of communal problems and their causes and consequences and the planning of education interventions to address these issues. The design process integrates two main components:

- Identifying and understanding a community's needs
- Designing and documenting community based education solutions to meet these needs

Generally, the process of project design is undertaken by ERFA's in-country partners. To be eligible for ERFA funding, project proposals must be forwarded to ERFA for appraisal. The processes of project design and appraisal are to be carried out according to a set of agreed principles.

ERFA expects the following principles to guide project design.

- Projects are to be designed in partnership with their target community
- Eligible projects are to be designed as an education response to identified and documented community needs
- Identification and assessment of community needs involves research and analysis to accurately identify and understand the needs and their causes and consequences
- Project designs should evolve from wide community engagement and participation, which facilitates joint identification and assessment of community needs, especially for those groups in the community most in need
- The community engagement process should enable communities to gain insight into any differences between their perceived and real needs and to reach a common understanding
- Projects must be designed to strengthen local community capacity through their implementation stage, which is essential to ensure project sustainability
- In addition to target communities, research and analysis should include engagement with other relevant stakeholders such as civic authorities, civic organisations, community leaders and other relevant NGOs

9.0 Project flexibility

ERFA recognizes the importance of flexibility when, for a variety of reasons, an implemented project may not be working according to plan. ERFA acknowledges the importance of advising relevant donors of any necessary adjustments to a project's design and the reasons for these.

10.0 Applying for funding

ERFA accepts funding applications from eligible development projects throughout the world during its annual funding application period.

Priority is given to education programs which are community focussed, time-bound interventions resulting in local management and autonomy.

10.1 First time applications

First time applicants should submit a Concept Note to ERFA utilising the template in the Program Toolkit at www.erf.org.au. ERFA will provide feedback on the Concept Note advising whether the program should proceed to submitting a full funding application within the funding application period.

10.2 Funding application templates

All requests for funding must be submitted on a current ERFA application form. Forms can be downloaded from ERFA's website www.erf.org under the "Program Toolkit" menu. There are three (3) distinct Application Forms:

- a) Program Proposal & Funding Application Form for program delivery (Australian programs);

- b) Program Proposal & Funding Application Form for program delivery (Overseas programs); and
- c) Capital Application Form (for capital works such as buildings).

ERFA Program Proposal & Funding Applications must be submitted on the relevant current year's funding application template available online at www.erf.org.au. The application requires details information in order for ERFA to appraise in two key areas:

- i. Project design
- ii. Capacity to deliver

10.3 Program/Project Budget

A completed current version of the budget template must accompany funding applications and is available on ERFA's website (www.erf.org.au) under the "Program Toolkit" menu. Budget details for the project or program should include:

- how much funding is being sought from ERFA
- specifics on the intended use of ERFA funding (this should align with detail in the funding application)
- details of other sources of co-funding for the project/program - agencies, government, private donors, in-kind donations etc, and

10.4 Funding Application Process

The following points should be noted in regard to ERFA's funding application process:

- ERFA currently has no minimum or maximum individual funding application amount.
- Only applications which fulfil all criteria for eligibility will be accepted (see item 3). Those not eligible will be returned to the applicant with a statement of how they do not meet the eligibility criteria.
- All completed and governing body approved funding applications should be submitted to ERFA by close of business on 31 August.
- ERFA's Funding Assessment Group reviews applications to ensure they meet eligibility criteria.
- ERFA works with the Program Managers to ensure (insofar as possible) that all applications submitted to institutional/agency, third party or co-funding organisations or donors are completed to the highest standards possible as demanded by those funders and donors.
- ERFA may respond to applicants with particular queries prior to the Board's final decision on funding.
- Upon satisfactory completion of the application and any associated queries, ERFA's management make recommendations to the ERFA Board on all applications.
- Applications will be considered on their merit with a view to ensuring a fair allocation of available funding.

11.0 Funding assessment criteria

Applications for program funding will be assessed under the following essential criteria:

- Relevance and alignment with ERFA's vision
- Internal logic of the project design (i.e. evaluation of how proposed project activities will enable achievement of project goal)
- Feasibility of partner capacity to deliver (evaluation of existing partner resources and skills) within the scope of the project
- Consistency of project proposal with identified target community's needs
- Assessment of project sustainability strategies
- Consideration of related cross cutting issues
- Assessment of proposed monitoring and evaluation arrangements
- Evaluation of ERFA's capacity to attract funding for the project

- Application standard and adherence to best practice development principles
- Accountability of previous reports and audits (for previously funded programs)

12.0 Funding timelines

- The funding application period is open in July each year and closes on 31 August. Applications made to ERFA outside of these times will only be considered if permission is granted by the ERFA Board.
- All funding applications are reviewed by ERFA management and referred to the ERFA board in September/October.
- Should there be a request for further information and/or clarification, governing authorities and program leaders will be contacted following the September/October board meeting. Governing authorities and program leaders have until 1 November to respond to any such requests.
- Final funding decisions are made at the ERFA November board meeting and applicants are notified as soon as possible thereafter.

13.0 Transfer of funds

Providing fully compliant reports and/or acquittals have been received, transfer of funds takes place in the **third week** of February, May, August and November.

When funds transfers are due, the ERFA Finance Office will receive instruction in electronic communication from ERFA management requesting the transfer. The instruction outlines the purpose of funding and confirms the account to which funds will be transferred.

ERFA will advise the relevant Program Leader of the transfer and the Program Leader is required to email acknowledgement of the amount of funding received.

14.0 Funding variations

Should there be a requirement to redirect funds to a different activity/program, a request must lodged with ERFA. A verification process will be conducted by ERFA and a decision will be made at the discretion of ERFA's Board and/or CEO in accordance with ERFA's delegations of authority. A program must have received written approval for variation from ERFA prior to funds being expended.

Where funding has been approved for a particular activity/program and, for whatever reason, there is a delay in fully implementing the approved activity/program or there is a material underspend (>10%) on the activity/project, ERFA should be notified by emailing ERFAReports@erf.org.au in order that following fund transfers can be adjusted accordingly. If a program wishes to hold over the funds to enable the activity/program to be completed in a later period written approval from ERFA must be sought.

15.0 Funding complaints

Appeals or complaints relating to funding decisions or transfers may be made to the Chair of the ERFA Board of Directors and can be lodged via ERFA's website at www.erf.org.au. All appeals or complaints lodged will be acknowledged within five (5) working days. A response to the appeal will be provided within four (4) working weeks. Where the matter has to be referred to the full Board for consideration, the applicant will be advised of the date of the next board meeting and a final response will be issued within five (5) days of that scheduled meeting.

16.0 Emergency funding/special appeals

ERFA's funding commitment is to annual funding of community based education programs. Whilst not encouraged, ERFA recognises that from time to time funded programs may wish to seek emergency funding or launch special funding appeals. If programs wish to facilitate this activity through ERFA, a

formal written request must be submitted detailing the purpose of the request, why it is necessary, the amount being sought and the required timeframes. These requests will be submitted to the ERFA Board within 2 business days for consideration. A decision on the request will be provided as soon as practicable recognising that funding of this type is not within objects of ERFA's Constitution.

17.0 ERFA policy compliance

It is a requirement that ERFA funded programs comply with ERFA policies which may be updated from time to time. It is the Program Leader's responsibility to ensure that program/project policies align with ERFA policies and that staff are trained accordingly. Program Leaders must familiarise themselves and ensure compliance with all ERFA policies prior to submitting a funding application. Program Leaders must report on compliance and training relating to policies throughout the program/project cycle.

17.1 Child Protection

All projects, programs and activities supported by ERFA must have approved Child Protection Policies in place if they are dealing with children. ERFA applications must be supported by confirmation that approved Child Protection Policies are in place for any program working with children or any vulnerable persons. A copy of the program/project up-to-date, site-specific Child Protection Policy must be submitted with all applications. Failure to provide this Policy will result in an application being declined.

17.2 Safety and Security Policy

ERFA believes that in-country personnel are a precious resource for the communities that ERFA supports.

Therefore, it is a condition of receipt of ERFA funding that programs are managed by partners in accordance with ERFA Safety and Security Policy for program staff. It is also a requirement that partners acknowledge and accept, with respect to program staff safety and security, ERFA's responsibilities and obligations under relevant Australian law and any governance or funding body requirements (e.g. DFAT/ANCP and ACFID).

17.3 Counter Terrorism Policy

ERFA is committed to avoiding involvement in terrorist activities, avoiding supporting terrorism and avoiding supporting individuals and organisations that support terrorism. All of ERFA's program partners are required to be aware of ERFA's obligations under Australian law and are required to adopt similar measures in respect of funds from ERFA. Funding recipients are required to provide detailed accounting reports, at least annually, showing how funds have been disbursed. The identity, credentials and good standing of all key program/project personnel and office bearers, and the organisations ERFA supports, will be checked to ensure people or organisations are not on the Australian government sanctions or proscribed terrorist organisation lists.

17.4 Anti-Corruption and Anti-Fraud Policy

ERFA is committed to maintaining a culture of honesty and zero-tolerance of all forms of corruption and fraud. All projects, programs and activities supported by ERFA must comply with ERFA's Anti-Corruption and Anti Fraud Policy.

17.5 Non-development Activity Policy

ERFA is committed to ensuring that funds and other resources designated for the purpose of aid and development will be used only for those purposes. This policy outlines the requirement for a clear separation between aid and development and non-aid and development objectives and activities. ERFA funds may not be used to promote a particular religious adherence or to support a political party, or to promote a candidate or organisation affiliated to a political party.

17.6 Cross-Cutting Issues

Cross-cutting issues include: child protection, gender equality and female empowerment, disability and inclusiveness, protection of human rights and environmental sustainability. ERFA is committed to mainstreaming cross-cutting issues. ERFA recognises that these issues are integral to development and have strong impacts on development. ERFA recognises that development effectiveness will be compromised if relevant cross-cutting issues are not integrated into project design and planning. ERFA expects funded programs to have policies in place that address cross-cutting issues relevant to the nature of their work.

18.0 Program monitoring, evaluation and reporting

18.1 Assessing Project Performance – Monitoring & Evaluation

ERFA recognizes two main objectives in assessing project performance:

- Accountability: monitoring and evaluation build greater transparency and accountability in the use of project resources
- Learning: future project planning and development are improved when guided by lessons learned from project experience

18.2 Monitoring and Evaluation – Understanding the Difference

While the terms monitoring and evaluation are often interchanged or grouped together, they are fundamentally quite distinct management tools, though closely related and mutually supportive. A key difference is that they are carried out at different stages of the project cycle.

ERFA acknowledges that the following principles should guide all monitoring and evaluation (M&E):

- M&E should be planned at project design level
- M&E processes should be conducted in cooperation with project partners using participatory methods
- M&E enables assessments to be made as to whether projects are achieving set targets
- M&E processes should seek to strengthen partner systems and staff capacities
- M&E should provide opportunities for project partners to learn and develop good practice and improve future project design
- Information generated through M&E should provide both ERFA and project staff with a clearer basis for decision-making
- M&E should be designed to meet the information requirements of primary stakeholders including accountability to donors

18.3 Monitoring

Monitoring involves systematic tracking of project progress throughout the project cycle to ensure that the project is on track. The functions of monitoring are to:

- ensure that programs are being effectively implemented and disbursed funds are accounted for
- provide opportunities for two way exchange of learning and verification of program progress against agreed objectives
- provide opportunities to assess the organisational health and capacity of partners
- provide opportunities to assess future project needs and follow-up on known issues such as project risk, stakeholder concerns and cross-cutting policy issues

18.4 ERFA Project Monitoring Reports

All ERFA funded projects are required to submit Quarterly Monitoring Reports for the 1st, 2nd and 3rd quarters of the calendar year (unless specified otherwise in ERFA's funding contract). Reports must be submitted on the approved ERFA form, available via the Program Toolkit at www.erf.org.au. Quarterly Reports are prepared by in-country project leadership or their delegated officer and enable ERFA to

monitor the projects it funds and to ensure that they are accountable for funding received.

There is a requirement that the approved budget template be updated with actual income and expenditure and submitted with the quarterly reports.

There is an expectation that program leaders will provide ERFA with material (e.g photos, internet links, printed materials) that will assist in the dissemination of information on the programs to the wider community via various mediums including ERFA’s website, communications, social media and printed materials. Provision of these materials should comply with ERFA’s policies on Privacy and Child Protection. Images must be sent as jpg files with high resolution for printing (minimum 1mB) and should be sent to ERFAReports@erf.org.au

Reporting timelines are outlined in the table below.

Date	Reports Due
30 January	Annual Acquittal due
30 April	Quarterly Report (January – March)
30 July	Quarterly Report (April - June)
30 October	Quarterly Report (July - September)

18.5 Evaluation

Evaluation is time specific and is undertaken to establish whether a project has reached its objectives and delivered what was expected according to its original plan. Hence, evaluation is usually undertaken at the end of a project or at a specific point in time to assess a project’s achievements. The objectives of evaluation are to assess:

- Relevance: has the project engaged proactively with real problems in the local community
- Efficiency: are available resources being used wisely and is the project developing strategies for continuous improvement
- Effectiveness: are desired outputs being achieved
- Impact: is the project having a positive, long-term impact on improving the quality of the lives of the community
- Sustainability: is the project sustainable
- New Knowledge: what new knowledge has emerged about effective development practice

18.6 ERFA Project Evaluation Reports

The annual acquittal covers the year completed for programs which have received funding from ERFA. It is intended to evaluate the project’s management and performance and establish whether a program has reached its objectives and its impact has been measured. It also requires consideration of how the program delivery may be improved into the future. The template for this report can be downloaded via the project toolkit link on the ERFA website, www.erf.org.au.

The approved budget must also be submitted with income and expenditure actuals for the final (fourth) quarter completed. Annual audited financial statement for the year together with a management letter must be submitted to ERFA as soon as they become available.

18.7 Field Monitoring & Evaluation

All ERFA funded projects are subject to field monitoring and evaluation visits by ERFA staff and/or representatives. Field monitoring may focus specifically on an issue particular to the project, a set of standard compliance issues or may be an in-depth evaluation of the project.

19.0 Learning

ERFA is committed to continuous improvement across all aspects of its operations including the delivery and support of funded programs, stakeholder engagement and organisational sustainability.

Through ongoing monitoring and evaluation of funded programs, ERFA continues to refine and improve its own processes and policies relating to project cycle management.

ERFA's scheduled reporting processes and templates ensure consistency and rigour in monitoring and evaluation of funded programs/projects. This reporting, addressing expected outputs and outcomes together with measurement indicators, ensures program staff and ERFA are able to monitor and assess and improve program effectiveness. Scheduled field visits also enable ERFA to identify learnings that arise for funded programs. ERFA is committed to providing support, formalised feedback and training to the programs we fund. ERFA actively shares learnings across programs to support effectiveness and improve impact. ERFA invites and seeks feedback from program partners and other stakeholders in scheduled reporting and at any other time in order to improve organisational processes and practices.

ERFA's online "Program Toolkit" (www.erf.org.au/program-toolkit) also facilitates the sharing learning and resources.