Project Design, Funding & Management Policy

Policy & Procedure Owner	CEO Office	
Approved by	ERFA Board of Directors	
Date Approved	Date of Last Revision	Next Review
21 October 2015	June 2021	June 2023

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

Programs Director	Emily Faller – ejfaller@edmundrice.org
ERFA	www.erf.org.au or +61 7 3621 9649

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 EFRA'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 Program Design, Funding & Management (PDFM) Policy is to outline Edmund Rice Foundation Australia's (ERFA) approach to the design, funding, monitoring, evaluation, accountability and learning (MEAL) 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 partnership and funding application and approval processes. The Policy also covers ERFA's commitment to learning and continual improvement. ERFA considers it critical that all of its processes are transparent and accountable to its 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, evaluation, accountability and learning are essential performance management practices for assessing and improving program effectiveness and impact

2.0 ACFID context

The ACFID Code of Conduct requires that members comply with the following Quality Principles in relation to the design and quality assessment of development work:
- **4.3.1** Members assess the quality of their strategies, designs and plans;
- **4.3.2** Members monitor, evaluate and learn from their work.

This Program Design, Funding & Management Policy completely complies with these requirements.

These Quality Principles demand that the following processes be adhered to:
- members have a documented appraisal process for assessing the grants applications of potential partners;
- members have documented planning, monitoring, evaluation and learning frameworks;
- members have a documented policy statement committing them to monitoring, evaluation and learning across the whole organisation;
- members have scheduled reporting processes each quarter with form templates;
- during monitoring and evaluation, ERFA Staff regularly liaise and follow up with Programs to request more information, suggest changes and to articulate expected outputs and outcomes.

3.0 Edmund Rice Foundation (Australia)

3.1 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.

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

3.3 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.

3.4 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.

3.5 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.

3.6 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-imbursement 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).

4.0 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. ERFA's partnership support and funding for a Project 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.

5.0 Funding focus

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

ERFA seeks partnerships 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 three (3) core areas:
1) **Formal Education:** programs delivering education in pre-schools, primary schools, secondary schools and vocational education/training.
2) **Community Education:** including community health, sanitation, nutrition, livelihood training, language, agriculture, life-skills training.
3) **Development Education:** grassroots advocacy including human rights, social justice, environmental sustainability, gender equality and inclusivity.

6.0 Eligibility for funding

For a funding application to be considered by ERFA it must:
- fall under one of the three (3) 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.

7.0 Eligible education programs

Eligible programs include those which provide:
- education for program staff and volunteers to enable delivery of services to communities, for example training of medical staff, community health volunteers, teachers, etc.;
- formal education, such as primary school operations and vocational training centres, as part of a "local area program";
- training initiatives to build capacity of primary stakeholders in communities such as micro-finance/business skills, agriculture skills, literacy or computing skills;

- advocacy and human rights training that raises awareness and empowers communities to advocate for themselves 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 as part of a wider education initiative;
- equipment and machinery which supports delivery of education initiatives;
- nutrition/feeding programs that are integral to an ERFA-funded education project and without which, the development project would falter.

8.0 Ineligible programming

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

- individual scholarships or tuition fees;
- 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;
- an allocation of more than 10% of the total project budget in overheads, administrative costs, operational costs and indirect wages;
- feeding projects not justified as an essential component of an ERFA-partnered development project;
- non-education based projects or activities such as medical services or medication.

9.0 Project design, processes and procedures

ERFA regards effective project design as the identification of social issues in a community, their causes and their consequences, and the planning of education initiatives, informed from this identification, that seeks to address root causes of problems.

ERFA's development approach encompasses both:

- a community development approach where the community has full involvement and leadership in planning, developing, delivering and evaluating community initiatives;
- community-based projects where partner organisations deliver skill-building initiatives in specific areas such as literacy, vocational training, microfinance, human rights and advocacy training.

For ERFA, project design involves working with communities to define development activities that are:

- asset-based community development (ABCD) approaches, which encourage people and communities to harness existing assets, capacities and strengths in order to create community-owned, sustainable solutions;
- processes that seek to address the root causes of poverty;
- processes that seek to empower rights-holders to claim their rights and ensure that duty-bearers exercise their duties;
- supporting systems and structures which enable people to move out of poverty.

Generally, the process of project design is undertaken by ERFA's in-country partners and their communities. 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.

In its partnerships, ERFA expects the following principles to guide project design. Projects should:

- be designed in partnership with communities building on existing strengths and incorporating full beneficiary participation (especially that of vulnerable beneficiary segments) in all stages of the project cycle;
- be based in an education response to identified and documented community needs;
- be designed to address root causes of identified issues including consultation with communities to gain insight into any differences between perceived and real needs and reach a common understanding;
- be time-bound with a clearly defined exit strategy;
- incorporate a holistic approach to economic, social, cultural and environmental sustainability;
- empower key stakeholders to claim their rights and ensure that duty-bearers deliver on their responsibilities;
- incorporate a sustainability strategy to ensure continuation of the benefits beyond the life of the project resulting in community-owned initiatives supported with locally available resources;
- incorporate comprehensive research and analysis to accurately identify and understand the needs and their root causes and consequences;
- strengthen local community capacity through the implementation stage, which is essential to ensure project sustainability;
- include engagement and partnerships with other relevant stakeholders such as civic authorities, civic organisations, community leaders and other relevant organisations;
- incorporate performance indicators that allow for ongoing measurement of effectiveness.

10.0 Applying for partnership and funding

ERFA accepts applications from eligible development projects throughout the world during its annual application period. New partnerships should make contact with ERFA to undergo a process of due diligence prior to full application.

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 contact ERFA to undergo a due diligence process and may then be invited to submit a Concept Note to ERFA utilising the online template. Following that, ERFA would 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 Partnership/funding application templates

All requests for partnership/funding must be submitted via ERFA's online platform. This can be accessed from ERFA's website www.erf.org during ERFA's annual application period in July/August.

The application process requires programs to provide detailed information in order for ERFA to appraise organisations and projects in three (3) key areas:

1. organisational structure and operations including governance, strategy, risk, compliance and management;
2. Project design;
3. capacity to deliver.

10.3 Project Log frame and Budget

A completed current version of the Logframe & Budget template must be submitted with applications and is available via the online portal. Budget details required for the Project include:

- total Project budget amount;
- the amount of funding being sought from ERFA;

- details on the intended use of ERFA funding including identification of any non-development expenditure;
- details of all other sources of co-funding for the project.

10.4 Partnership/funding application process
The following points should be noted in regard to ERFA's application process:
- ERFA currently has no minimum or maximum amount for funding. Each organisation and project will be assessed on its merits taking into account a range of criteria and ERFA's ability to attract funding for the Project.
- Only applications which fulfil all criteria for eligibility will be accepted (see Clause 7). 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 the due date.
- ERFA's Assessment Team 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 partnership and funding.
- Upon satisfactory completion of the application, assessment 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 partnership and project funding will be assessed under the following essential criteria:
- relevance and alignment with ERFA's vision;
- evidence of need;
- project strategy;
- project design;
- strategic approach;
- gender equality;
- policy assessment;
- evidence of community support;
- budget & financial management;
- quantum of funding requested;
- diversification of funding;
- cross-cutting policies;
- risk management framework;
- sustainability;
- capacity to deliver.

12.0 Funding timelines
- The funding application period is open in July and August each year. Applications made to ERFA outside of these times are generally not accepted and 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. Instalments are made in equal quarterly instalments unless detailed otherwise in the funding contract.

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 written request must lodged with ERFA's Programs Director. 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 info@erf.org.au in order that following fund transfers can be adjusted accordingly. If a program wishes to hold over funds to enable the activity/program to be completed in a later period written approval from ERFA must be sought. Any unexpended funds at the end of the calendar year must be reported on in the annual acquittal and may only be carried forward with written approval from ERFA.

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 and 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 an approved Child Protection Policy in place if they have contact with children. This is a red line criterion for ERFA partnership. Applications to ERFA must include a copy of the Program/Project's up-to-date, site-specific and governing authority-approved Child Protection Policy. Failure to provide this Policy will result in an application being declined.

17.2 Prevention of Sexual Exploitation, Abuse and Harassment (PSEAH)
All Projects, Programs and activities supported by ERFA must have an approved PSEAH Policy in place. This is a red line criterion for ERFA partnership. Applications to ERFA must include a copy of the Program/Project's up-to-date, site-specific and governing authority-approved PSEAH Policy. Failure to provide this Policy will result in an application being declined.

17.3 Complaints Handling Policy
All Projects, Programs and activities supported by ERFA must have an approved Complaints Handling Policy in place that provides a permanent system for processing feedback from Project stakeholders and stipulates clear processes on how to lodge, register, triage, investigate and finalise complaints feedback. Further, all projects must have a designated and trained Complaints Handling Officer onsite. This is a red line criterion for ERFA partnership. Applications to ERFA must include a copy of the Program/Project's up-to-date, site-specific and governing authority-approved Complaints Handling Policy. Failure to provide this Policy will result in an application being declined.

17.4 Safety & 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).

17.5 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.

17.6 Anti-Corruption & 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.

17.7 Development & 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.

17.8 Cross-Cutting Issues

Cross-cutting issues include: child protection; prevention of sexual exploitation, abuse and harassment; gender equality and disability and inclusiveness. 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 and 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	Acquittal reports due
30 April	Quarter 1 Report due (January-March)
30 July	Quarter 2 Report due (April-June)
30 October	Quarter 3 report due (July-September)
30 January	Annual Acquittal Report due

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 and 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.