



## EXPLANATORY BOOKLET 2017

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## BACKGROUND

The Island of Jersey is the largest of the Channel Islands, which lie close to the French coast. It is part of the British Isles but not of the United Kingdom, and in almost all respects Jersey is a self-governing community. It has its own history and traditions, its own government (the States of Jersey) and its own laws. In 2015 the estimated population was 102,700.

Jersey Overseas Aid (JOA) was established by the Jersey Overseas Aid Commission (Jersey) Law 2005 (P.14/2005). It is governed by a Commission, which consists of three States members and three non-States members, all of whom are appointed by the States of Jersey. Their objectives are to manage and administer the monies voted annually by the States of Jersey for overseas aid. They are assisted in doing so by two professional staff. JOA is an independent body within the responsibilities of Jersey's Chief Minister.

JOA firmly believes that:

- It is our moral duty to care about other people and to help them help themselves;
- It is our duty to our children and grandchildren to address issues of poverty and health which may in the long term threaten global security; and
- It is the States' duty to meet existing international obligations. Jersey is a signatory to Agenda 21, which commits signatories to give 0.7% of their Gross National Product (GNP) to international aid. Jersey currently allocates about 0.25% of its GNP.

Despite the strides made in improving global wellbeing in recent years, it is still the case in 2016 that:

- 836 million people still live in extreme poverty.
- Globally, one in nine people in the world today (795 million) are undernourished. Every day, 8,500 children under 5 die from poor nutrition.
- 1.4 billion people have no access to electricity worldwide – most of whom live in rural areas of the developing world.
- 103 million young people (aged 15-24) worldwide lack basic reading and writing skills. More than 60% of these are women.
- 2.4 billion people lack access to basic sanitation services, such as toilets or latrines.
- 663 million people remain without access to an improved source of drinking water.

## **POLICIES**

JOA's strategy is driven by a clear mission.

- i) It is committed to joining with others in reducing poverty in the poorest countries by making a sustained contribution.
- ii) In particular it will continue to contribute to:
  - basic health care;
  - education;
  - safe drinking water and sanitation;
  - livelihoods, self-sufficiency and food security;
  - environmental sustainability;
  - gender equality;
  - emergency and humanitarian needs.

JOA provides funding in the following areas: -

- grant aid for development projects implemented through UK-registered charities and other recognised specialist aid agencies;
- emergency and disaster relief through internationally-recognised relief agencies;
- community work projects, where teams of Jersey volunteers undertake specific development projects overseas;
- supporting Jersey Charities in their work overseas, generally on a matched funding basis
- providing sponsorship and bursaries to Jersey professionals offering charitable services overseas.

JOA will only issue grants to its approved agencies, a list of which can be found on JOA's website. Agencies wishing to apply for inclusion on the list should also refer to the website for further information.

## **FUNDING**

### **GRANT AID**

Most of JOA's budget (around 70%) is allocated to grants for development projects implemented by recognised international charities.

JOA usually funds one-year projects up to a value of £100,000 and all or part of multi-year programmes (2-4 years) up to a value of £300,000, although these limits are being reviewed. Agencies may submit proposals which meet a demonstrated development need in one or more of JOA's target countries, and which comply with the conditions below. Additionally, JOA will make grants of up to £1m in response to specific calls for proposals, issued on JOA's website or shared with selected partners.

For the period 2017-2020, JOA will focus its development efforts on a target group of countries, which were chosen on the basis of needs (as represented by Human Development Index Scores), likely ability of development efforts to effect lasting change (using Transparency International's Corruption Perception score as proxy) and on JOA's previous experience. These are:

1. **Africa:** Ethiopia, Ghana, Lesotho, Liberia, Malawi, Mozambique, Rwanda, Sierra Leone, Tanzania and Zambia
2. **Asia:** Bhutan, Nepal, Myanmar
3. **South America:** Bolivia, Colombia, Guatemala

JOA will evaluate proposals according to the criteria below. Where JOA requires additional clarification about projects, it may invite representatives of the proposing organisation to a short meeting in London or Jersey. Precise weightings and cut-off points may vary, and JOA will not enter into correspondence about scoring decisions.

<b>Criteria</b>	<b>Details</b>
<b>Country of focus</b>	Proposed project completely or substantially operates in one or more of JOA's published focus countries
<b>Organisational Background</b>	<ul style="list-style-type: none"> <li>- Organisation is registered with Jersey Government, UK Charities Commission or EU Government as an NGO or non-profit organisation, or is a recognised International NGO or UN Agency</li> <li>- Organisation is well governed, with appropriate controls and oversight mechanisms in place</li> <li>- Policies and procedures are in place to ensure it manages projects efficiently</li> <li>- Organisation publishes audited accounts and financial reports</li> </ul>
<b>Capacity to implement</b>	<p>The proposing organisation should demonstrate that it has the experience, capacity, and commitment to successfully implement the proposed project. This information must be contained in the proposal – JOA is not expected to conduct background research.</p> <p>Evaluators to consider:</p> <ul style="list-style-type: none"> <li>- Previous experience relevant to the proposed project topic</li> <li>- Previous experience relevant to the proposed project location</li> <li>- Previous experience with JOA-funded projects has not been negative</li> <li>- Demonstrable experience of conducting projects with similar or larger budgets to the sum being requested</li> </ul>
<b>Needs and Objectives</b>	<p>Problem statement explains the issue or challenge the project sets out to address and convincingly shows the rationale behind intervening at this proposed stage.</p> <p>Needs assessed realistically and scientifically.</p> <p>Project impacts / objectives are quantified and appear reasonable (including estimates of numbers of direct and indirect beneficiaries).</p>
<b>Plausibility of change</b>	Proposal demonstrates convincingly why this intervention is appropriate to achieve the stated objectives, and how each activity leads to each result. A logical framework is required here, along with a discussion of risks.

<b>Implementation plan</b>	Proposal should present a detailed and feasible plan describing the various stages of project implementation. It should adequately set out the composition and roles of the implementation team, the role of each partner organisation and the time frame.
<b>Coordination, ownership and alignment</b>	Proposal should show how the project relates to other multilateral and bilateral aid agency projects, and other relevant community-based, NGO, and/or private sector activities. Proposal should show how project aligns with government plans and activities, and what steps have/will been taken to ensure ongoing coordination with related activities. Proposal should explain what role the local community / target beneficiaries (will) have had in the design and implementation of the project.
<b>Sustainability</b>	Change brought about by the project is significant and long-lasting. There is a discussion of potential/planned replicability/continuity of the project (or its effects) after funding ceases, including credible mechanisms to ensure ongoing operation and maintenance of any project inputs.
<b>Monitoring and Evaluation Plan</b>	<p>The proposal should contain an explanation of the plan for monitoring and evaluating the project, both during its implementation and at completion (review and analysis). Qualitative and quantitative indicators are identified and (for the most part) objectively measurable.</p> <p>Key issues to be addressed are:</p> <ul style="list-style-type: none"> <li>- How performance will be tracked in terms of the activities and milestones in the Implementation Plan;</li> <li>- How the impact of the project will be assessed;</li> <li>- How the project will respond to mid-course feedback and correct itself as required;</li> <li>- How the participation of community members in M&amp;E processes will be achieved.</li> <li>- How the recipient and others will be able to learn from the project</li> </ul>
<b>Budget</b>	Project expenditures are planned realistically, based on reasonable prices, and clearly linked to the implementation of planned activities. The proposed costs are commensurate to the likely benefits. Where the JOA project is part of a larger project, the proposal should include and describe the entire budget as well.
<b>Financial management</b>	The proposal should specify what steps the recipient will undertake to audit project finances and verify expenses are real and reasonable; how procurement will be undertaken fairly and to provide best value; how any project partners / sub-grantees will be vetted and audited.

One-year project grants will normally be paid in two **instalments**: 80% on agreement, and 20% on receipt of satisfactory final narrative and financial reports. Multi-year grants will normally be disbursed on an annual basis, again subject to the receipt of satisfactory narrative and financial reports. Where deviations from this schedule are necessary they should be explained in the funding proposal.

**JOA is committed to enabling partners to recover the full cost of delivering projects.** Any legitimate (including salaries and admin support) costs are in theory eligible, but they must be instrumental in bringing about the proposed project outcomes, rather than in supporting core activities of the recipient organisation or its partners. Large capital expenditures such as land or vehicles are discouraged except where specifically a goal of the project, and their use after the duration of the project must be explained.

JOA will consider **co-funding** projects with another donor or donors. The application must clearly set out where JOA's funding fits in to the wider programme, and include the detailed budget and logical framework for the larger project as well as for the activities JOA will fund. The payment of funding in such cases will be deferred until the partner agency confirms that the co-funding has been secured.

JOA is committed to encouraging **learning and improvement** in itself and its partners, to maximising the impact of the assistance it provides, and to providing excellent value for the Jersey taxpayer. For this reason, all projects must demonstrate how progress will be monitored and results appraised, and are encouraged allocate at least 5% of the overall grant to monitoring, evaluation and learning. Additionally, JOA reserves the right to commission independent mid-term or final evaluations of any project it funds, and expects the full cooperation of grantees with this.

Organisations must procure inputs with propriety and fairness, seeking best value for money at all times. Applicants must demonstrate that all goods and services required for the project will be purchased in accordance with an ethical and transparent **procurement policy**. Typically, any purchases of over £10,000 must be tendered using competitive bidding.

Final **financial and narrative reports** must be submitted within three months of the end of the project, and evidence of all expenditures must be kept by the partner and made available to JOA on request. Narrative reports must include a publishable summary which will be made public on JOA's website.

These and other provisions are covered by the **Grant Agreement** which governs all JOA-funded development projects.

## **DISASTER & EMERGENCY RELIEF**

JOA allocates a proportion of its budget to respond to both natural disasters and human conflict. Funding is only made available to internationally-recognised agencies with clear experience in disaster relief.

JOA usually limits grants to £100,000 per agency per emergency, normally setting a maximum of £300,000 for any one disaster. Agencies should see the website or call our office for information about whether this limit has been reached. Additionally, JOA sometimes makes larger emergency grants in response to extraordinary needs. These exceptional donations are developed in conjunction with trusted agencies at JOA's invitation.

Applications to be funded must be for the immediate relief of human suffering. JOA recognises immediate relief to include the provision of temporary shelter and schooling,

clothing, heating, cooking items, food and health care. Longer-term proposals for infrastructure and disaster preparedness will fall within the remit of grant aid.

Whereas grant aid applications must be for specific identifiable projects, emergency and disaster relief funding is available for general use in dealing with a specified emergency or disaster or an identified part of an agency's wider emergency response. JOA recognises the need for flexibility in this area where priorities and conditions in the field can change rapidly, but whenever possible, the agency should identify what the funding will purchase. Emergency funding is only made available once a needs assessment has been carried out.

JOA appreciates the importance of immediate funding when such emergencies and disasters occur, and responses to requests are usually given within a week of their receipt.

## **COMMUNITY WORK PROJECTS**

Since 1972 Jersey has facilitated parties of volunteers to work with communities in developing countries for up to four weeks. Each community work project is formed of eight to twelve volunteers and is led by an experienced team leader.

Each participant contributes towards their own travel expenses and JOA funds the additional costs of the trip. JOA also funds all the materials and supplies necessary in order to complete the projects. The volunteers engage in fundraising activities to finance additional community support in the host country. Applications from potential volunteers with a minimum of five years' residency are given preference.

JOA offers and supports **leadership programmes** for project leaders and potential leaders. Courses are usually offered after a volunteer has participated previously in a JOA project.

Community work projects serve to raise awareness in Jersey of global development issues. They also play an important part in Islanders' own personal development. Many have led to lasting links with communities all over the world, and several local charities were born from volunteers' experiences abroad. To date over 1,000 volunteers have completed over 100 projects in some of the world's poorest communities.

## **GRANTS TO LOCAL CHARITIES WORKING OVERSEAS**

JOA supports local, Jersey-based charities working overseas. This is usually on the basis of matching funding on a pound-for-pound basis, with a usual maximum of £5,000 per project. JOA will give consideration to larger grants for Jersey charities which are able to demonstrate long-term relationships with beneficiary communities and the capacity to manage and account for such spending. JOA will only grant funds if the charity demonstrates that it is personally involved in undertaking the activities to be funded. A local charity cannot act as only a funding channel.

Jersey charities may apply for more than one grant per year. A local charity may not apply for emergency and disaster relief funding.

To be eligible the Jersey charity must demonstrate that it is a registered charity and has adequate governance and financial oversight policies in place. A copy of the constitution of the charity is to be provided, together with details of the persons controlling the charity and recent accounts.

As with JOA's larger grants for international NGOs, local charities must demonstrate in their funding applications that their proposed activities are sustainable, necessary, and have the approval of local authorities in the target country.

## **PHILANTHROPIC AND CORPORATE GIVING**

JOA will consider partnering with companies, trusts, foundations and private individuals in their philanthropic endeavours.

## **BURSARY AWARD**

The purpose of the JOA bursary award is to support individuals or groups who have specialised skills which can be used for the benefit of communities in developing countries. The bursary award will cover reasonable travel expenses from Jersey, and reasonable living expenses during the course of the placement. JOA may also agree to cover other expenses at its discretion. JOA reserves the right to apply for repayment of the bursary award if the applicant fails to complete the project or does not submit reports when requested.

The project to be undertaken by the applicant must meet the objectives of JOA. Research must be undertaken and a paper provided setting out the key objectives of the project and how those will be met. The applicant will also have researched potential barriers to successful delivery of the project and the steps which can be taken to mitigate failure. The applicant will have a detailed budget of expenses, with information of any co-funders.

The Applicant will have been resident in Jersey for 5 years or more and must meet at least one of the following criteria to be eligible for a bursary award:

- The Applicant will have some experience of overseas aid work;
- The Applicant will have a relevant degree or specialisation.

The maximum time for a project will usually be one year. The recipient of the award will be required to report on the development of the project on a timescale set out by JOA. Applications to support student gap-year projects will not normally be entertained.

Interested persons are encouraged to contact JOA at any time.

## **APPLICATION PROCESS**

JOA is pleased to support its approved agencies, a list of which can be found on JOA's website. This list is revised periodically at the discretion of the JOA Commissioners. JOA regrets that it does not accept unsolicited proposals.

All requests for funding are processed through the Office and Operations Manager, who will distribute any relevant application forms. Copies will not be passed to third parties. A presentation to JOA may sometimes be required.

All participants undertaking Community Work Projects or in receipt of bursaries will be police checked. JOA also undertakes due diligence on all grantee organisations, and expects them to implement the same high standards in the prevention of terrorism, corruption, money-laundering and any other form of criminal activity.

Decisions are final, and JOA is not obliged to enter into any correspondence about them.

## **VISIBILITY**

All programmes funded or part-funded by JOA will be acknowledged by the recipient of the funding in any interview, literature or media releases where the project is mentioned. Acknowledgement should be given to Jersey Overseas Aid and the people of Jersey.

Lasting project-funded inputs (such as clinics, wells, training materials etc), communications (including publications and websites) and display materials (posters, project signboards, banners etc.) should display JOA's logo, the words 'Jersey Overseas Aid', and the legend 'Supported by the People of the Island of Jersey'