



**A Practical  
Guide to  
Successful  
Municipal  
Cooperation**

**Un guide  
pratique pour  
une coopération  
municipale  
réussie**



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**FCM MUNICIPAL PARTNERSHIPS**  
**- A Practical Guide to Successful Municipal Cooperation**

Third Edition

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# About FCM and its International Programs

The Federation of Canadian Municipalities (FCM) is the national association of municipal governments in Canada. Since 1901, it has represented the interests of all Canadian municipal governments on policy and program matters within federal jurisdiction. FCM has over 1,000 members that include Canada's largest cities, small urban and rural communities and the major provincial and territorial municipal associations. Its mission is to improve the quality of life in all communities by promoting strong, effective and accountable municipal government.

In 1987, Canadian municipalities gave FCM, through its International Centre for Municipal Development (ICMD), the mandate to be their representative internationally. Since then, FCM has been the only legitimate representative of Canadian municipalities internationally and the main source of Canadian municipal practitioners and resources for international work. FCM's ability to deliver successful international programming is demonstrated by its portfolio of partnerships, projects, and initiatives focusing on management capacity building, service delivery strengthening, and decentralization policy development.

FCM's main international programming is carried out through its Partnership Program, funded since 1987 by the Canadian International Development Agency (CIDA). The goal of the Partnership Program is to reduce poverty and improve the quality of life and sustainability of local communities by developing and empowering local government in selected developing countries. Its objectives are to (1) increase the capacity of local governments to address local issues around social development, environmental sustainability, and economic well-being, (2) improve the policy and regulatory environment in which municipalities and cities operate, and (3) strengthen the regional and multilateral networks that support municipalities and cities.

The core of FCM's Partnership Program is municipal partnerships and technical exchanges between Canadian municipalities and overseas counterparts, including municipalities, cities, national associations of municipal governments and central government agencies dealing with local government issues. The Program is active in several countries in three regions of the world – Asia, Africa and Latin America.

FCM also implements large, focused capacity-building bilateral projects in specific countries, which are funded by various CIDA country and regional programs and by other donor agencies. These projects can range from providing support to decentralization processes, to collaborating on an integrated approach to municipal management. FCM is currently managing such bilateral projects in Africa, Asia, Latin America and the Middle East and has developed partnerships with private sector firms and NGOs to deliver bilateral projects in several other countries.

FCM's strength is the ability to draw upon its municipal members, corporate members from the private sector, and a civil society network for the technical and professional expertise required in international programming. As a result of FCM's international activities, Canada has gained a reputation for municipal excellence and is well known in overseas municipalities, the donor community, the international network of municipal associations, and here at home in our own communities.

# Preface

Cities and municipalities are central to development. As the order of government closest to the community, municipal governments are the first to respond to citizens and deliver the services they need. The role of cities and municipalities is increasingly important in today's context of globalization, rapid urbanization, decentralization and democratization. In developing countries, municipal governments are particularly affected by these challenges that clearly impede their ability to reduce poverty and improve the quality of life of their communities. Over the past decade, international cooperation efforts have increasingly focused on the municipal sector in order to meet development objectives.

Canadian municipal governments have a long and successful history of managing sustainable development. They have established cost-effective methods to deliver a wide range of services, negotiated significant decentralization of powers from the national and provincial governments, and are accountable to their citizens through the election process and other participatory activities. They have also developed the experience to work with their peers in developing countries to share their expertise and provide assistance in finding solutions to common municipal development problems.

Since 1987, with the backing of the Canadian International Development Agency (CIDA), FCM has supported initiatives to strengthen local governments in many countries in Africa, Asia, Latin America, the Caribbean, the Middle East and Central and Eastern Europe. Through FCM, over 150 Canadian municipalities have worked with local governments on a peer-to-peer basis in more than 20 countries. These "Municipal Partnerships" have become the cornerstone of FCM's international work and have led to concrete improvements in the quality of life in many communities.

We are proud to present the third edition of our Guide for the use of municipal partners in implementing their activities. FCM Municipal Partnerships: A Practical Guide to Successful Municipal Cooperation incorporates the many lessons learned since 1987, and contains the input of countless municipalities. It sets out the way to proceed in a partnership, based on a procedure that has been developed, tested and refined over the years. The Guide provides references and tools that should lead you to a successful municipal cooperation experience.

Municipal partnerships are a powerful way to deliver quality development work. The many successes that have been achieved through municipal partnerships are due to the dedicated efforts and contributions of participating municipalities. We know that municipal partners will continue to think of new ways of improving the quality of life of their communities. As your municipal partnership develops, you will undoubtedly discover new and uncharted terrain as you explore different facets of municipal cooperation. We hope this Guide will provide a reference point from which you can venture forth to experiment with new practices and processes to bring about sustainable development.

Thanks to all of you!



Brock Carlton  
Director, International Centre for Municipal Development  
FCM

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# 1 Introduction

Welcome to the world of municipal international cooperation! Now that your Municipal Partnership has been established, you and your municipal partner are about to start an enriching and exciting municipal international cooperation experience, working together on a peer-to-peer basis to strengthen democratic local government across culture and political boundaries. With your municipal partner, you will develop and implement a project in a priority area for municipal development. This Guide will help you as you work through the process.

The Guide is intended for the use of the Local Coordinators for the Municipal Partnership, in both the Canadian municipality and the overseas partner municipality. As the Local Coordinators, you will be a consistent presence throughout the partnership, overseeing your Partnership Project from beginning to end. You will be the key to ensuring sustained support for the project, coordinating its administrative

and operational details, and responding to the needs of both partner municipalities. For more information on your role, see **Tool 1** of the Tool Kit at the end of this Guide. It provides a template of the terms of reference for Local Coordinators.

Please take a moment to read the overview on the following pages. It will give you a general picture of what you might expect in the course of your partnership as you work on a project. The overview will also help answer the following questions:

- What is a Municipal Partnership?
- What is a Partnership Project?
- What will you find in this Guide?

## 1.1 What is a Municipal Partnership?

A Municipal Partnership is a form of municipal international cooperation initiated by the Federation of Canadian Municipalities (FCM) in 1987. It is a formal, long-term relationship between two local governments that allows municipal partners with similar mandates and goals to share their experience and work together to find solutions to practical problems and challenges. Its methodology requires a peer-to-peer transfer of expertise in the framework of an agreed project of cooperation on specific areas of municipal responsibility. Unlike twinnings or sister city agreements, which are cultural relationships, Municipal Partnerships focus on technical assistance in specific areas. A Municipal Partnership is formed for the purpose of implementing a series of Partnership Projects.

The Municipal Partnership model has proved to be successful for establishing strong peer-to-peer international relationships that not only build municipal capacity in specific areas of need, but also create opportunities for sharing and expanding knowledge in municipal processes. Municipal partners not only have the satisfaction of seeing concrete results achieved through their projects, but also enjoy additional benefits from participating in a Municipal Partnership (see sidebar).



### Definition

#### Municipal International Cooperation

Within its unique experience and approach to international municipal development, FCM has been instrumental in defining, together with the International Union of Local Authorities (IULA), the widely accepted concept of Municipal International Cooperation (MIC).

MIC includes all international activities that involve local government organizations and practitioners working together to strengthen democratic local government – on a peer group or partnership basis.

MIC also includes the development and strengthening of national associations (or federations) of local governments and their support networks at world and regional levels.

The principles of MIC now govern a significant number of municipal development programs designed by various organizations and donors in many countries.

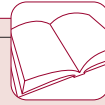




## Illustration

### Benefits of Municipal Partnerships:

- Overseas partners in municipal partnerships increase their capacity to deal with municipal management issues;
- Greater cooperation and interaction among local community organizations, schools, clubs and businesses;
- Opportunities for staff members to apply their knowledge in a new context, to improve leadership and language skills, and to put expertise and creativity to work in solving municipal problems. This results in increased self-confidence and job satisfaction;
- Greater awareness and appreciation of different cultural values and minority groups;
- Greater understanding of development issues;
- Community pride;
- Recognition by other cities and other orders of government for the community's expertise;
- Solid relationships forged as a framework for future economic ventures;
- Increased stature of overseas partners has attracted additional support from other countries;
- Greater awareness of the role and participation of women in municipal life.



## Definition

### Municipal Capacity Building

Municipal capacity building is the process of developing the individual and institutional capabilities that enable a municipality to carry out its roles and responsibilities effectively.

These capabilities include individual skills, knowledge and competencies, as well as institutional tools, processes, systems and resources.

Capacity building improves a municipality's potential to achieve its objectives in relation to its mandate and environment.

Municipal Partnerships may implement just one Partnership Project during a period of two years. However, if both partners agree, they may work together to develop, design and implement several consecutive Partnership Projects. A partnership may therefore implement more than one two-year Partnership Project over the course of its existence. Each project will have its own specific objectives and implementation plan.

A Partnership Project goes through three phases over a two-year period: Project Inception, Project Implementation, and Project Evaluation and Dissemination. Each phase consists of a series of activities designed to achieve a certain purpose. Figure 1.1 is a snapshot of the phases of a Partnership Project.

## 1.2 What is a Partnership Project?

A Partnership Project is a joint initiative developed and implemented by partners in a Municipal Partnership to improve municipal management capacity in specific areas for the purpose of dealing with selected governance, administration or service-delivery problems.

Each Partnership Project has specific objectives and a set of planned activities that address capacity-building issues in one or two priority areas of municipal responsibilities, ultimately to improve the quality of life of the population. Partnership Projects usually last about two years, and activities consist of short-term Technical Exchange Missions of municipal practitioners, both men and women, in Canada and overseas. These missions provide the opportunity for training, technical assistance and coaching. Canadian experience is used strategically to complement local expertise.

### Project Inception

During the Project Inception phase, an Assessment Mission and a Project Definition Mission take place. During these missions, both partners assess the issues faced by the overseas municipality in a selected priority area of municipal management, identify relevant Canadian experience, and define a Project Proposal that will target some of these issues. In this critical stage the partners establish a relationship and decide whether to commit to or withdraw from the partnership.

Figure 1: Phases &amp; Results



### Project Implementation

During the Project Implementation phase, the main activities of the Project Proposal are carried out. Technical Exchange Missions and Partnership Support Activities take place, according to the proposal put forward by both partners during the Project Inception phase. Technical Exchange Missions are missions to Canada (for overseas participants) and missions overseas (for Canadian participants), during which two or three participants may be involved in training, mentoring, technical assistance and coaching. Partnership Support Activities complement these missions and may be organized by the overseas municipality (e.g., workshops, training, technical work or public consultations) or by other organizations, usually a national municipal association (e.g., workshops held by a municipal association for a group of municipalities in the region to exchange knowledge on similar issues, research undertaken by an institute, strategic technical assistance provided by a private company, etc.).

While each Technical Exchange Mission and Partnership Support Activity has its own specific objectives, together, they form a coherent set of activities designed to achieve the goal of the Partnership Project.

### Project Evaluation and Dissemination

During this phase, partners undertake a joint Evaluation Mission overseas, to evaluate the results of the project, analyze the factors that contributed to or hindered its success, and draw lessons learned. Through Dissemination Activities such as workshops and publications, project results are shared with other municipalities. Both partners may agree to apply to FCM to extend their Municipal Partnership and to develop a new Partnership Project to address further capacity-building issues.

Throughout the project, a project management team carries out continuous performance monitoring and evaluation. This team comprises the Local Coordinator from the Canadian municipality, the Local Coordinator from the overseas partner municipality, and a staff representative from FCM. FCM provides any guidance and support the partners need.

## 1.3 What Will You Find in this Guide?

This Guide is designed to be a practical reference to provide you with the information and tools you will need throughout your partnership. The contents of the Guide are organized according to the process of designing, implementing and finalizing a Partnership Project – so that you can find the information you need as you proceed. The main sections are as follows:

- Section 2 – **Before You Begin** provides an overview of the context for Municipal Partnerships and your country and region of work;
- Section 3 – **Getting Started** describes the Inception Phase of your Partnership Project;
- Section 4 – **Implementing Your Project** describes the Implementation Phase of your project;
- Section 5 – **Wrapping It Up** describes the final phase of your project;
- Section 6 – **Useful Information** provides information on financial arrangements, health issues, as well as working effectively in a cross-cultural environment;
- Section 7 – The **Tool Kit** provides tools, examples and templates for the various documents and reports you will need to complete during your project.

Throughout the Guide, you will find figures, diagrams, and text boxes with definitions, illustrations, and tips that are designed to help you understand the municipal partnership approach from real examples of existing partnerships.

In addition to this Guide, you may also wish to browse through FCM-ICMD's interactive web site at [www.icmd-cidm.ca](http://www.icmd-cidm.ca), where you will find the electronic version of this Guide, supplementary information, as well as suggestions and tips posted by existing partnerships.

Finally, do not hesitate to contact your FCM Officer with any questions you may have in the course of your project.

Happy reading!

# 2 Before You Begin

## 2.1 Overview

Your municipal partnership and your project are part of a larger program for municipal capacity building that involves many other organizations. Your work will take place in a region where other FCM-sponsored municipal partnerships have worked together, sometimes for several years. Being aware of the wider context will help you implement your partnership and project.

### Section 2 describes:

- FCM's Partnership Program;
- FCM's approach to building municipal capacity;
- The specific context of your work and other FCM-sponsored activities in your region.

## 2.2 FCM's Partnership Program

Cities, municipalities and local governments represent the order of government closest to the people and, as such, are recognized as the key to development. They supply basic services that create healthy and livable cities for men, women and children. They provide and manage infrastructure to sustain the local community. They support economic growth that provides opportunities for even the poorest among their citizens. They also give people in communities a voice to influence the policies and programs that affect them. At the same time, cities and municipalities struggle with issues such as poverty, pollution, and lack of funding. Many factors affect the capacity of a municipal government to address the needs of its citizens: the globalization of local economies, the decentralization of powers from central government without adequate resources, population growth in urban centres, and increased demands for democratic rights.

In 1987, Canadian municipalities gave FCM the mandate to be their representative internationally to work on these issues. Since then, FCM has been a partner of the Canadian International Development Agency (CIDA) in implementing

international development programs in the municipal sector. FCM has involved hundreds of Canadian municipalities, cities and partners in international initiatives, including technical municipal partnerships that link Canadian municipalities with local governments in several countries.

While FCM is involved in a range of international activities, the core of its programming is the establishment of municipal partnerships between cities and municipalities in Canada and developing countries that increase their capacity to deliver services to their communities. FCM's Partnership Program, established in 1987, is the program that funds your Municipal Partnership. The Partnership Program aims to help develop and empower municipal governments in developing countries, in order to reduce poverty and improve the quality of life and sustainability of local communities. Its objectives are to increase the capacity of local governments to address local issues around social development (including gender equality, environmental sustainability, and economic well being), to improve the policy and regulatory environment in which municipalities and cities operate, and to strengthen the regional and multilateral networks that support municipalities and cities. The program fosters good governance practices worldwide through Municipal Partnerships and supports the creation and dissemination of knowledge about municipal capacity issues. Efforts are concentrated in Asia, Africa and Latin America.

FCM's Partnership Program receives financial support from CIDA. Participating municipalities and cities, both in Canada and overseas, also contribute substantial resources to the program by making in-kind contributions, mostly by allowing time for leaders and staff to take part in program activities, but sometimes by donating local goods and services. Participating municipalities and cities sometimes organize fundraising campaigns to support partnership activities.

## 2.3 Building Municipal Capacity – The FCM Approach

FCM, together with its Canadian and overseas partners, have used their experience of implementing numerous international projects to develop an integrated approach to building municipal capacity. This systematic and incremental approach, which is summarized below, can serve as the basis for your relationship as municipal partners. You will find detailed information on this approach in **Tool 2** of the Tool Kit at the end of this Guide.

### FCM's Municipal Capacity Development Framework

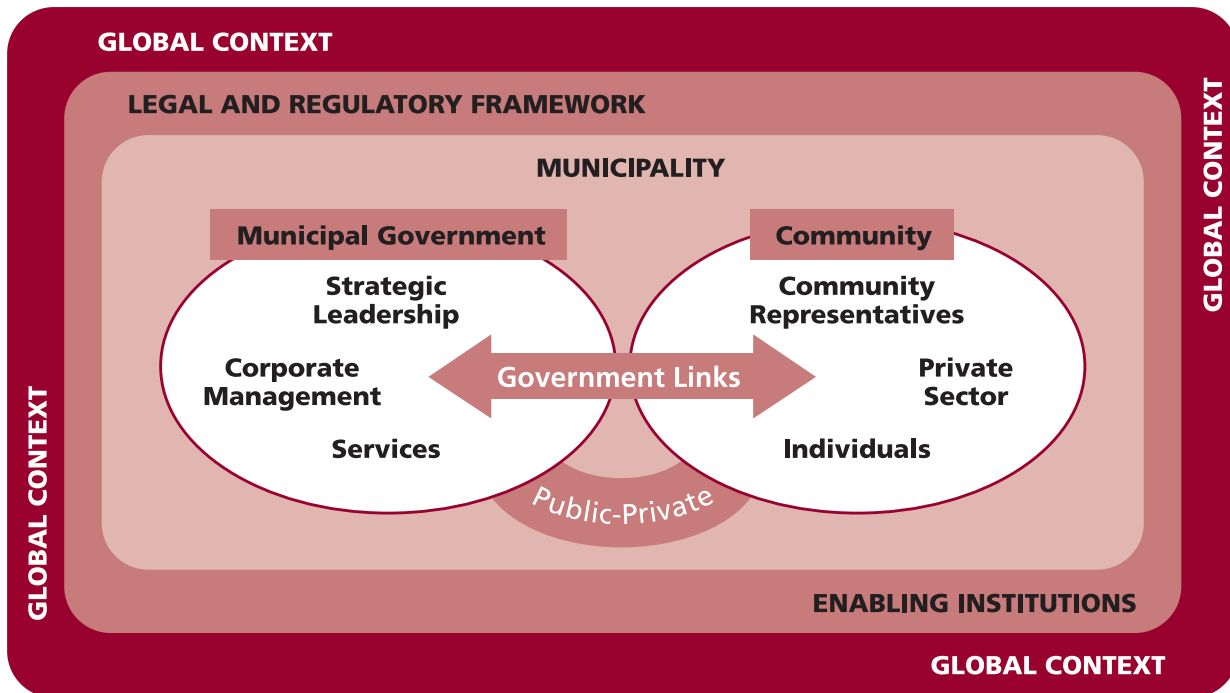
FCM has developed a view of the relationships between the various components that make up the municipal world. The Municipal Capacity Development Framework, depicted below, was designed to illustrate these relationships. This framework can be used to analyze the context in which municipal partnerships and projects will operate, to identify the strengths and weaknesses of municipalities, to define areas that need support, and to target where interventions should best be placed within a municipality or a city and within the national, regional and global municipal contexts.

In this framework, the municipal world is seen as a system in which:

- Municipal government works together with many actors (such as elected officials, municipal employees, community groups, government officials and the private sector) and forces to deliver services to the community;
- Governance links (elections, open council meetings, task forces, committees) enable municipal government and its citizens to communicate about the needs and problems of the community;
- Municipal government is influenced by the legal and regulatory framework (national policies, laws, and regulations) in which it operates and interacts, as well as with enabling institutions (government agencies, national associations of municipal governments, research centres, universities, training institutes and professional associations) that help or enable it to deliver services to the community;
- Finally, the municipality is affected by the global or international context.

Your project fits into this view of the municipal world. Typical Partnership Projects implemented by municipal partnerships deal primarily with municipal government, but may also involve the community, private business and industry, national institutions and global networks. Most Partnership Projects

Figure 2.1: FCM's Municipal Capacity Development Framework



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focus on ways to improve the management processes within municipal government, by enhancing strategic leadership, strengthening corporate management or improving the delivery of services to the community. Projects also assist municipal governments to involve the community more in its decision-making and planning processes, and to find ways to cooperate with community organizations and private businesses in developing alternative service delivery mechanisms.

Through Partnership Support Activities, Partnership Projects can also be linked with enabling institutions to develop policies and programs for municipal development at the national and international level. For example, many projects include special activities with municipal associations to help define policy orientations for the entire municipal sector or to organize activities that disseminate results after the project has been completed.

### FCM's Institutional Capacity Development Framework

Whereas the Municipal Capacity Development Framework will help you identify where you will make your interventions, the Institutional Capacity Development Framework can assist you in identifying how you will do it. FCM has identified four stages of institutional capacity development through which partners typically move to deliver results. These four stages are shown in the figure below. Although municipal development is rarely a linear process, given its inherent complexity, many of our partners have found this conceptual tool useful in designing their project proposals. During the course of implementing a project, this same framework can be used to monitor how well results are being achieved, and at the end of a project to evaluate its successes and failures.

#### Stage 1 - Diagnosis and Consensus

The first stage marks the beginning of the process of building institutional capacity. This is the stage at which stakeholders identify the need to build capacity in a certain focus area and agree on a plan of action. In your Partnership Project,

this stage corresponds to the Project Definition. Both partner municipalities agree on the issues to be addressed in the project and together carry out a needs analysis to assess the current capacity in the overseas municipality. Both partner municipalities then define a project that will build municipal capacity in the area of cooperation. The most important issue during this stage is to establish a relationship between the two partners, and that there be broad-based agreement on the identified problem and its solutions.

#### Stage 2 - Knowledge and Skills Building

In this stage, project partners build the knowledge and skills needed to develop their capacity to address the goal and purpose of the project. In your Partnership Project, this corresponds to the beginning of the Project Implementation phase. Based on the diagnosis reached in Stage 1, both partners will build on the relationship established, working together on training programs, technical exchanges, workshops and other activities aimed at improving municipal participants' awareness and understanding of potential solutions to their identified problem. At the end of this stage, municipal staff should be trained and highly motivated to apply new knowledge and skills to their work, which will take place in Stage 3.

#### Stage 3 - Systems Development

This stage focuses on developing the systems, tools and procedures (such as new waste management plans, new council operation procedures, new community programs, etc.) that the municipal staff will need to maximize the knowledge and skills attained during Stage 2. In your Partnership Project, this corresponds to the second part of the Project Implementation phase. These tools and systems should be designed so that the solutions identified will be sustainable and will continue long after the project is completed.

#### Stage 4 – Institutionalization

Changing the ways things are done is an important stage in the development of municipal capacity, and perhaps the

Figure 2.2: FCM's Institutional Capacity Development Framework





## Illustration

### Applying the FCM Approach to Municipal Development in Waste Management

In the City of San Paolo in the Philippines, issues around solid waste management and proper solid waste disposal procedures at the landfill were creating serious environmental problems.

In **Stage 1**, San Paolo and its Canadian partner assessed current solid waste collection systems and identified where improvements should be made. They decided to improve the management of the disposal site, develop a financial plan, and work in cooperation with the Municipal Association of the Philippines to identify compliance measures with the country's new Solid Waste Management Act. They would also implement a recycling program within the community. At the end of this stage the partners reached an agreement on a plan of action to build knowledge and develop systems to engineer improvements in the identified areas.

In **Stage 2**, training courses were organized for municipal staff. These focused on landfill operations and management processes, health and safety issues associated with landfill operations, and specific training for operators of heavy equipment. A technical exchange mission was organized to examine a model recycling program and waste collection system in Canada.

In **Stage 3**, San Paolo and its partner developed a new Landfill Design and Operations Manual that now guides the daily operations of the disposal site. They also designed a public information and educational campaign to ensure a successful recycling operation.

Finally, in **Stage 4**, the partners worked to define and adopt a new waste management policy to sustain the results that had been achieved and to make sure that new practices were institutionalized. In this last stage, the partners also presented, together with the municipal association, a series of national workshops to disseminate the results achieved by their project.

most difficult stage of the process. Although Stages 1 to 3 may take considerable effort, they can be relatively straightforward – identify a problem, make a plan, acquire skills and develop systems. But actually applying new learning, systems and approaches in a manner that leads to sustained change within a municipality can be a major challenge. In Stage 4 of your Partnership Project, you will be engaged in changing the way things are done by testing and applying the new knowledge, procedures, tools and systems that you developed during Stages 1 to 3. This often requires in-depth training to ensure beneficiaries can effectively apply what has been developed during earlier stages. Organizational change is never static – you will also need to monitor and evaluate the implementation of the new solution and refine it to meet evolving circumstances. The sign that sustainable change has been achieved lies in the effective implementation of plans, procedures and systems that will endure and continue to evolve even after your project ends.

As you work through the four stages of Institutional Capacity Development, you will address capacity problems to improve operations or deliver basic services to the community. Over the long term, it is anticipated that these improvements in municipal capacity will have a meaningful impact in the community and result in an improved quality of life for its citizens.

### Gender Considerations

It should not be forgotten that the involvement and promotion of women in both the decision-making process and project implementation is essential to all FCM programs and that the benefits of development projects should be distributed evenly. Special efforts need to be made to assess and analyze how proposed activities will have different impacts on men and women, and what steps need to be taken to ensure that all people can benefit in the same way from the project. The concepts of a healthier and more sustainable physical environment, and the promotion of economic growth in municipalities to directly benefit the poor and marginalized populations of the community are important to FCM programs.

## 2.4 Country Strategies for Municipal Cooperation

In overseas countries in which FCM supports municipal partnerships, a Strategy for Municipal Cooperation is usually developed. This provides a shared understanding and an effective implementation framework for structuring Canadian municipal development cooperation with overseas partners. The strategy includes a list of top priorities for municipal capacity building or improvements identified as national priorities and for which support is needed. The strategy is anchored on a solid analysis of the host country's context, including such elements as poverty reduction, economic and social indicators, as well as a description of the system of local government and the issues it faces. This reflection also takes into account existing national plans such as National Development Plans and Strategies, Municipal Sector Strategies, Poverty Reduction Strategy Papers, and donors' country programs.

The strategies respond to two usual main objectives:

- To identify a focused set of municipal capacity development priorities directed towards the achievement of the country's overall development objectives and the overarching goal of reducing poverty;
- To define the distinctive role of FCM and its partners to help address these priorities.

The strategies are prepared with the active participation of Canadian and local municipal partners, the host country national association(s) of local government, relevant central government agencies, relevant national institutions, FCM staff, and through consultations with other stakeholders, such as civil society, NGOs, the private sector, and aid agencies.

Municipal partnerships are usually established as a means of implementing the strategies for municipal cooperation developed in each country in which FCM operates. Partners are invited to consider the priority areas for municipal cooperation as identified in the strategy of their country of work.

## 2.5 Specific Context of Your Project

To design and implement your project, it is important that both the Canadian and Overseas Coordinators be aware of the specific context in which your work will take place.

Your Municipal Partnership is established to help implement a Strategy for Municipal Cooperation. It is therefore important that you know the content of this strategy and what other partnerships sponsored by FCM are doing to support its implementation.

Although there are many similarities in municipalities across Canada, each Canadian province has its own system of municipal government. There are also differences in the types of services that municipal governments deliver from one province to another. It is particularly important that the overseas participants in the partnership understand the Canadian context for municipal service delivery.

Your FCM officer will provide information on the involvement of FCM and other cities and municipalities in your country or province. This will also include information on the existing country strategy for the overseas partner's country, as well as the system of municipal government in the province of origin of the Canadian partner.

Please read these documents carefully and do not hesitate to discuss any questions with FCM.



# 3 Getting Started

## 3.1 Overview

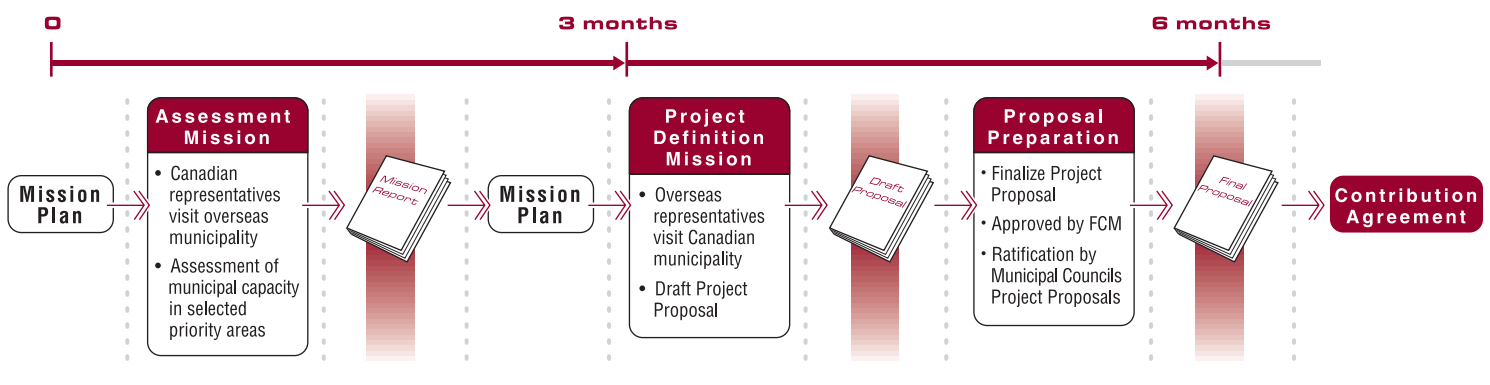
This section of the Guide will help you get your project started. It describes the Project Inception Phase, during which both partners assess the issues faced by the overseas municipality in a selected priority area for municipal management improvement, identify relevant Canadian experience, and define a project that will target some of these issues. This phase usually lasts between four and six months. The figure below shows the various activities, preparation and reports needed in this phase. The Project Inception Phase is the critical stage for establishing the personal relationship between the two partners that will be essential for its success.

## 3.2 The Assessment Mission

### What is the Assessment Mission?

This is the first activity that helps define your Partnership Project. The Assessment Mission is a working visit by representatives from the Canadian partner to the overseas partner municipality. Its purpose is to assess the organizational strengths and weaknesses in the municipality with regard to the area of cooperation for the project. The mission is an opportunity for both partners to get to know each other and to scope out the issues to be addressed in the course of the project.

Figure 3.1: Project Inception



### Section 3 includes information on the:

- Assessment Mission – the initial visit overseas in which an assessment is made of the municipal capacity in the areas addressed by your project;
- Project Definition Mission – the mission to Canada in which the project is defined;
- Project Proposal – the document that will guide your Partnership Project.

### What will the Assessment Mission accomplish?

By the end of the mission, both partners should have a shared understanding of:

- FCM's Partnership approach, and the current municipal development strategy and priorities in the overseas partner's country;
- The overseas partner's organizational strengths and weaknesses in the area of cooperation;
- The key capacity-building needs of the overseas partner that can be addressed by the project.

The Canadian municipality should also have a better understanding of the roles and responsibilities of municipal government in the partner's country.

### Who goes on the Assessment Mission and for how long?

Four or five people usually take part in the Assessment Mission. This will include three delegates from the Canadian partner municipality, one staff member from FCM and sometimes one staff member from the municipal association of the overseas country, who will join the group to provide support. The three delegates from the Canadian municipality include one political representative (the Mayor or a member of council), the Canadian Local Coordinator, and one other staff member (the Chief Administrative Officer or City Manager, or a staff member working in the area to be addressed by the project). This mix of people allows for relationships to be established at all levels for the Partnership. An interpreter may also be included on the mission team.

The mission usually lasts for 15 days, including travel time.



#### Reminder

#### Gender Tip

Make an effort to include women staff members as mission participants. Doing so will promote their participation in municipal partnerships and give more visibility to women's roles in local government.

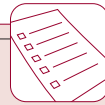
### What needs to be done before the Assessment Mission?

In preparation for the Assessment Mission, you will need to: prepare a Mission Plan, make travel arrangements, organize pre-departure briefings, distribute the Participant Kits, and have participants read up on health issues and the challenges of cross-cultural work.

#### Prepare a Mission Plan

The Mission Plan is an essential tool. It will help you plan for all aspects of your mission and help ensure that your mission goes well and your Partnership Project gets off to a good start. The plan does not have to be long but it should define

the objectives of the mission, the program of visits, and the budget for expenses. For this first mission, your FCM Officer will coordinate the process of preparing a Mission Plan with the Canadian and Overseas Coordinators. **Tool 3** of the Tool Kit at the end of this Guide provides a template for a Mission Plan, while **Tool 4** provides examples of mission plans developed for assessment missions. The Mission Plan should be finalized well in advance so that the overseas partner can prepare the detailed program of activities.



#### Checklist

#### Assessment Mission Checklist

- Prepare a Mission Plan in cooperation with FCM
- Make travel arrangements in cooperation with FCM
- Attend pre-departure briefings
- Distribute Participant Kits
- Read up on health issues and the challenges of cross-cultural work

#### Make travel arrangements

The Canadian Local Coordinator, with assistance from FCM, will arrange the international travel for the Canadian participants. Usually, the Overseas Coordinator will arrange for local transportation and hotel accommodation during the mission.

#### Have the mission participants attend pre-departure briefings

Pre-departure briefings on cross-cultural exchanges and working overseas are provided for participants to enable them to work more effectively on the mission. FCM and the Canadian Local Coordinator will arrange these briefings for Canadian participants in cooperation with the Canadian Centre for Intercultural Learning of the Department of Foreign Affairs and International Trade of Canada. It is also suggested that the Overseas Coordinator arrange a brief session in his/her municipality with the individuals who are likely to meet the Canadian visitors. The Overseas Coordinator can brief them on the rationale behind the municipal partnership and provide some information on Canada. FCM can provide documents to this effect.



## Illustration

### Objectives of the Assessment Mission for a Partnership Project in Sustainable Tourism Development

- To learn about the development context in El Salvador and important municipal issues;
- To learn about the structure and services of the overseas partner's municipal administration;
- To exchange knowledge specific to the development of tourism and environmental issues in both Canada and El Salvador, as well as specific issues related to the situation in the overseas partner municipality;
- To conduct a baseline data study through discussions with experts from the overseas partner;
- To discuss the potential content of a Partnership Project between the Canadian and overseas partners;
- To prepare the Project Definition mission in Canada.

### Distribute Participant Kits

Participant Kits are given to each participant on a mission and contain important information and the required reporting forms. FCM will provide the Canadian Coordinator with the Participant Kits. Mission participants should read all of the material in the kit, complete the required forms and return them to FCM. The travel insurance request form is compulsory and must be completed and sent to FCM. No participant can leave Canada without this insurance.

### Invite participants to read up on health issues and the challenges of cross-cultural work

Well-prepared participants will be more effective on a mission. Participants should seek information about health issues and the challenges involved in cross-cultural work that are specific to Municipal Partnerships. Participants should read **Section 6 – Useful Information**. This contains detailed information on health and travel issues, as well as many helpful tips about working on a cross-cultural team. It is also very important to learn as much as possible about the host country, particularly if this is the participant's first trip to that country.

### What happens during the Assessment Mission?

Many activities take place during the two weeks of an Assessment Mission. Typically, the mission is divided into three distinct parts: Initial Meetings, Assessment Activities, and a Wrap-up Workshop.

#### Initial Meetings

Upon arrival overseas, initial meetings are held to set the context for the mission. These will include meetings with the Mayor, municipal council representatives, and the Chief Administrator or Manager of the overseas municipality. The meetings allow the chief representatives of both municipalities to affirm their commitment to working together, to discuss the program of visits and make adjustments if necessary.

#### Assessment Activities

The assessment activities form the core of the mission and are designed to help Canadian participants gain an understanding of the institutional strengths and weaknesses of the overseas partner. FCM has prepared a Capacity Assessment Guide (see **Tool 5**) to help you carry out this assessment. During these activities don't forget to collect gender information, as this is an important aspect of international work.

Activities include:

- Meetings with senior officers in key departments to learn about the general municipal structure and services in the overseas municipality, (including gender equality issues on the municipal agenda, and the role of women in local government);
- Meetings and exchanges with municipal department staff and local experts in the area of cooperation; and
- Field visits to assess issues relating to the area of cooperation.

#### Wrap-up Workshop

Towards the end of the mission, at least one full day is devoted to a Wrap-up Workshop attended by key staff from the overseas municipality and the Canadian participants. This important workshop allows the mission participants to validate the information gathered during their meetings, exchanges and field visits. In addition, the mission members and the staff from the overseas municipality will reach agreement on a diagnosis of capacity-building needs in the overseas municipality. They may also begin to define the content of the Partnership Project.



## Reminder

### Assessment Mission Tips for Canadian Participants

- Make notes and collect information throughout the visits. At the end of each day, get together to debrief on impressions to date and compare notes. Your notes will be essential for the wrap-up session towards the end of the mission and for preparing the Assessment Mission Report.
  - Take part in all activities. Some activities may seem unrelated to the priority area of the project, but are included to help build context for the partnership.
  - Promote the discussion of gender equality issues, as these will not be automatically included on the agenda.
  - Take the time to interact personally and learn about each other's culture: cross-cultural communication skills and knowledge can contribute a great deal to the effectiveness of a Partnership Project.
- Enjoy the experience!

The mission usually ends with a final meeting with the mayor, council representatives and chief administrators from the overseas partner municipality. This serves to summarize learning and provides a forum to discuss the next steps, particularly the preparation of the Assessment Mission Report and the organization of the next mission to Canada.

### What reports need to be filed after the Assessment Mission?

Within 30 days of the assessment mission, the Canadian Coordinator, with input from the Overseas Coordinator, must file an Assessment Mission Report and an Expense Claim with FCM.

FCM reports semi-annually to CIDA and quarterly to its Board of Directors on the progress of the overall Partnership Program. Your Mission Report and Expense Claim will contribute to these FCM reports. FCM provides templates for mission reports. However, the narrative reports on your activities should also help you summarize information, track progress and report to your own council. Discuss these with your FCM Officer to make sure reports meet your own needs as well as FCM's. FCM also provides templates and forms that should be used for reporting financially on your activities.

### Assessment Mission Report

The Assessment Mission Report does not have to be long but will serve as an important reference for preparing the next mission and designing the Project Proposal. **Tool 6** provides general guidelines on how to prepare a Mission Report. Responses to the questions found in the Capacity Assessment Guide (**Tool 5**) are the main source of information for the Results Section of your Mission Report.

### Expense Claim

The Expense Claim should include supporting original receipts. See **Section 6 – Useful Information** for allowable expenses and details. An Expense Claim template and complete instructions are provided in **Tool 7**.

### What happens after the Assessment Mission?

By now, both partners will have a better understanding of how the municipal structure and operations will shape the Partnership Project. Both partners will also have an idea of how the peer-to-peer relationship will develop. Based on this understanding and the Assessment Mission Report, preparations are made in consultation with FCM for the next activity in the partnership: the Project Definition Mission.

## 3.3 The Project Definition Mission

### What is the Project Definition Mission?

The Project Definition Mission is the second activity that will help you define your Partnership Project. Three to four months after the Assessment Mission, the overseas partner municipality will send a delegation to the Canadian municipality for the Project Definition Mission. The mission allows the overseas partner to familiarize itself with the municipal government context in Canada and to observe Canadian practice in the area of cooperation. It also allows both partners to further develop their relationship and to define the content of the Partnership Project.

### What will the Project Definition Mission accomplish?

By the end of the mission, the overseas partner should have:

- A better understanding of municipal government in Canada;
- A better understanding of Canadian practice and methods in the area of cooperation.



## Illustration

### Objectives of the Project Definition Mission for a Partnership Project on AIDS and Social Issues

- To learn about the general municipal structure and services of the Canadian city's administration;
- To gain knowledge of the roles and responsibilities of key players at the local level such as community based organizations and NGOs and the way in which these bodies work with the City to address social, economic and health issues (including HIV/AIDS);
- To learn about the role of the Canadian provincial and federal governments in local issues and the way in which these two orders of government interface with the City and its programs;
- To exchange knowledge on HIV/AIDS and other social, economic and health-related challenges in the Canadian partner city as well as the current strategies aimed at addressing these challenges;
- To develop a draft Project Proposal for a two-year program of cooperation between the two partners; and
- To discuss the first technical exchange mission overseas.

Both partners should have:

- Shared agreement on the specific orientations for the Partnership Project they will implement together;
- Shared awareness of the potential risks and obstacles in implementing the project, and of measures to address them.

### Who goes on the Project Definition Mission and for how long?

The delegation for the Project Definition Mission usually comprises four or five participants: three delegates from the overseas municipality, one staff member from FCM and sometimes one staff member from the municipal association of the overseas country to provide support. The delegates from the overseas municipality include one political representative (the Mayor or a member of council) and two staff members (the Chief Administrative Officer or City Manager, and one staff member working in the area of cooperation).

As in the Assessment Mission, this mix of people allows for the relationships established during the Assessment Mission to be strengthened at all levels. An interpreter may be included on the team.

The mission usually lasts for 15 days, including travel time.

### What needs to be done before the Project Definition Mission?

In preparation for the Project Definition Mission, you will need to prepare a Mission Plan, make travel arrangements, prepare a letter of reference, organize pre-departure briefings, distribute the Participant Kits, and have participants read up on health issues and the challenges of cross-cultural work.

#### Prepare a Mission Plan

The Mission Plan will allow you to plan for all aspects of your mission. It will help ensure that your mission goes well and that you can begin to draft and work out the details of your project. The plan will define mission objectives, the program of visits and the budget for expenses. For this second activity in your partnership, your FCM Officer will again coordinate the process of preparing a Mission Plan with the Canadian and Overseas Coordinators (see **Tool 3** for a Mission Plan template and **Tool 8** for examples of Mission Plans for Project Definition Missions in the Tool Kit at the end of this Guide). Careful preparation is a key ingredient for the success of your mission. The Mission Plan should ideally be ready four weeks before the mission.

#### Make travel arrangements

The Canadian Coordinator, with assistance from FCM, will make international travel arrangements for the overseas participants and will also arrange for local transportation and hotel accommodation during the mission.

#### Prepare a letter of reference to obtain visas

A letter of reference will assist overseas participants in obtaining visas from Canadian Embassies, Consulates, or High Commissions overseas. The Canadian Coordinator should prepare a letter of reference (see **Tool 9** for an example) and send it to the overseas Local Coordinator, who will present it to the appropriate Canadian authorities when applying for visas.

#### Have the overseas participants attend pre-departure briefings

Pre-departure briefings on cross-cultural exchanges and working overseas may be provided for overseas participants to enable them to work more effectively on the mission. FCM will set these up in cooperation with other municipal partners in the overseas country or through other means.

## Distribute Participant Kits

Participant Kits are given to each participant on a mission and contain important information and required reporting forms. FCM will provide the Overseas Coordinator with the Participant Kits, which are then given to participants. Mission participants should read all of the material in the kit, complete the required forms and return them to FCM. The travel insurance form is compulsory and must be completed and sent to FCM. Overseas participants cannot leave their country without health insurance.

## Invite participants to read up on health issues and the challenges of cross-cultural work

Well-prepared participants will be more effective on a mission. Participants should seek information about health issues and the challenges involved in cross-cultural work that are specific to Municipal Partnerships. Participants should read **Section 6 – Useful Information**, which contains detailed information on health and travel issues, as well as many helpful tips about working on a cross-cultural team. It is also very important to learn as much as possible about Canada, particularly if this is the participant's first trip.



### Checklist

#### Project Definition Mission Preparation Checklist

- Prepare a Mission Plan in cooperation with FCM
- Make travel arrangements with assistance from FCM
- Prepare a letter of reference to obtain visas
- Attend pre-departure briefings
- Distribute Participant Kits
- Read up on health issues and the challenges of cross-cultural work

## What happens during the Project Definition Mission?

The Project Definition Mission is divided into three parts: Initial Meetings, Identifying Canadian Practices, and a Project Definition Workshop.

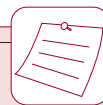
### Initial meetings

Upon arrival in Canada, initial meetings allow the representatives of both municipalities to reaffirm their commitment to working together, set the context for the mission, discuss the program of visits, and make adjustments if necessary. These meetings

are usually held with the Mayor, representatives from municipal council, and the Chief Administrator of the Canadian municipality. If there is a commission on women and /or gender within the municipality, a meeting is usually organized with its representative to ensure that consideration will be given to gender equality in the Partnership Project.

## Identifying relevant Canadian practices

These activities are intended to give overseas participants exposure to Canadian practices, so that appropriate areas for sharing expertise may be identified. There should be briefings on Canadian municipal government and Canadian policy and practice in the areas of cooperation. These briefings will be delivered by city officials, community organizations or other experts. There may be field visits to see Canadian practice in action, or workshops on management and training. Some cultural activities may be organized to complement the technical focus of the mission.



### Reminder

#### Project Definition Mission Tips for Overseas Participants

- Focus on how Canadian experience can be best utilized to assist in capacity building in your municipality. Make notes and collect information. Get together to debrief, follow up on initial impressions developed since the start of the partnership, and compare notes. Your notes will be essential for the preparation of the Project Proposal during the wrap-up session at the end of the mission.
- Ask questions! If you have concerns, are unhappy about certain issues, or are unclear about the way things are done, do not hesitate to speak to the Canadian Coordinator or to FCM.
- Participate fully in all activities. Some activities may seem unrelated to the area of cooperation, but are included to help build context for the partnership.
- Take the time to interact personally and learn about each other's culture: cross-cultural communication skills and knowledge can contribute a great deal to the effectiveness of a Partnership Project.

Enjoy the experience!

## Project Definition Workshop

The last two days of the mission are devoted to a Project Definition Workshop attended by key staff from the Canadian municipality and the overseas participants. This is the key moment of the Project Definition Mission. Until this point, all activities from the beginning of the Municipal Partnership have been laying the groundwork for what will take place in the workshop: the drafting of the Project Proposal.

The workshop usually begins with a briefing by both the overseas participants and the Canadian attendees. They discuss their impressions to date, summarize the results of the Assessment Mission for the overseas partner municipality, discuss the results of the current mission, and come to an agreement as to how Canadian expertise can be applied in the Partnership Project. Partners also discuss potential obstacles, for example, gender equality issues or concerns related to the specific area of cooperation, and how they will be overcome or addressed. They hammer out the details of the project. Then, together, they draft the outline of a Project Proposal, which will be finalized in the few months following the Project Definition Mission. In **Section 3.4 The Project Proposal**, you will find further details on the content of the Project Proposal. Your FCM Officer will usually participate in that workshop and guide both partners through this process.

During the workshop, participants may also develop a Letter of Intent (see **Tool 10** for examples). This is a short document signed by both mayors at the end of the Project Definition Mission, confirming the agreement of both municipalities to work together in partnership. The Letter of Intent formalizes the relationship between the two municipalities and makes reference to the Project Proposal that is being developed and will be completed soon.

### What reports need to be filed after the Project Definition Mission?

In lieu of a Mission Report, the Coordinators will prepare a Project Proposal based on their findings during the Project Definition Mission. Although no written Mission Report is required after the Project Definition Mission, the Canadian Coordinator must file an Expense Claim with supporting original receipts to FCM within 30 days of the mission.

See **Section 6 – Useful Information** for allowable expenses and details. An Expense Claim template and complete instructions are provided in **Tool 7** of the Tool Kit.

### What happens after the Project Definition Mission?

The initial draft of the Project Proposal, prepared at the end of the Project Definition Mission, should be finalized. Once this is approved by FCM, it should be formally endorsed by council resolutions of both municipal partners.

## 3.4 The Project Proposal

### What is the Project Proposal?

The Project Proposal is the key tool to help partners manage their Partnership Project successfully. The Proposal lays out the justification for the project, its activities and expected results. It defines the financial support required from FCM and other sources. It sets out the key issues on which partners will focus their cooperation, and around which they will plan missions and other activities. The Project Proposal lays the framework for monitoring progress achieved against initial expectations. As the key reference document used throughout the project's implementation phase, it should be prepared with due care and attention to detail.

### Who writes the Project Proposal?

The Local Coordinators from both the Canadian and overseas partner municipalities write the proposal together. Other staff in their municipalities will provide input and FCM will provide support.

As described earlier, the outline of a draft proposal is developed in the workshop at the end of the Project Definition Mission. During the workshop, FCM can help guide discussion and facilitate the formulation of the outline. In the four to six weeks following the Project Definition Mission, details are added and the proposal is refined and finalized through exchanges of emails and faxes. FCM is involved in this process to make suggestions to the partners for additions or changes.

### What needs to be in the Project Proposal?

The Project Proposal does not have to be a lengthy document. However, it is important that the rationale for the project, its expected results and the way to achieve these results be clearly defined. The various sections of the proposal are described below.

A Project Proposal template is provided in **Tool 11** of the Tool Kit at the end of the Guide. Fully developed examples of Project Proposals are provided in **Tool 12**. Other examples can be accessed on FCM-ICMD's interactive web site at [www.icmd-cidm.ca](http://www.icmd-cidm.ca).



## Illustration

### Table of Contents for a Project Proposal

1. Preamble
2. Rationale for the Project
3. Project Description
  - 3.1 Goal
  - 3.2 Objectives
  - 3.3 Expected Results
  - 3.4 Cross-cutting Considerations
  - 3.5 Risk Factors
4. Work Plan
  - 4.1 Program of Activities and Time Frame
  - 4.2 Monitoring and Evaluation
  - 4.3 Management Team
5. Budget

The Project Proposal consists of five sections:

#### Preamble

The Project Proposal begins with a brief description of how the proposal came about. This describes the context in which the municipal partnership was established and the activities carried out so far (i.e., the Assessment and Project Definition missions).

#### Rationale for the Project

Remember that a project is a joint initiative by municipal partners. Its aim is to find solutions to problems or issues faced in municipal management and service delivery in order to better serve the population. The Rationale section of the Proposal explains 'why' the project should be carried out. The section starts with a brief explanation of the importance of the area of municipal management selected for support during the project. A summary is provided of the strengths and weaknesses of the overseas partner in that area of cooperation, the issues the overseas partner faces trying to overcome these weaknesses, and the priorities for capacity building. This section should end with a clear indication of the capacity-building priorities that the project will address.

#### Project Description

This section of the Proposal is about 'what' the project expects to achieve in terms of change in the overseas municipality.

The 'goal' is the ultimate aim of the project, which, in a Partnership Project, is always to improve the living conditions of citizens. Remember that the long-term impact of your cooperation is to make a change in the community. When stating the goal of your project, answer the following question: How is the project expected to change the quality of life in the community?

The 'objectives' state precisely what the project aims to accomplish in terms of building municipal capacity to lead to an improvement in the quality of life. The objectives are the changes you would like to see happen in the way the municipality or city manages or delivers services.

The 'expected results' are measurable statements of what the project should achieve. A clear definition of these results will help you as you implement the project. To maintain focus, results can be divided into three categories:

- Short-term results will help you keep in mind what should be achieved as you undertake each project activity;
- Final project results will give you a clear picture of what you expect to achieve after all project activities have been implemented;
- The project impact (or long-term result) will help you keep the project focused on the long-term, i.e., how will the project improve the quality of life in the community in the long run?

FCM's four-stage Institutional Capacity Development Framework (see **Section 2**) can be useful in helping you develop the expected results statements for your Project Proposal. Discuss ways of adapting this framework to your project with your FCM Officer.



## Reminder

#### FCM's four-stage Institutional Capacity Development Framework

- Stage 1: Diagnosis and Consensus
- Stage 2: Knowledge and Skills Building
- Stage 3: System Development
- Stage 4: Institutionalization





## Definition

### All About Results

Expected results are the results one expects to achieve in a project or a program. There are usually three types:

Short-Term Project Results or Outputs: the project's 'quick hits', usually happening quickly after each of the project activities (e.g., tax collection staff trained in information technology, participatory process for decision-making designed and implemented);

Final Project Results or Outcomes: the final results expected at the end of your two-year project, as a result of building municipal capacity in the area of cooperation (e.g., efficient tax collection, women and minority groups included in decision-making);

Project Long-Term Results or Impact: the results achieved in the long run (over 3 years) to improve the quality of life for the community (e.g., better health, sanitation and environment due to improved solid waste management).

This terminology is used in the Results-Based Management and Accountability Framework, a framework used by CIDA and FCM's Partnership Program to design its programs and projects.

'Indicators' are ways to measure or prove that an expected result was achieved – these should be developed for each result statement. Indicators will help you monitor the way your project achieves the results that were planned. Take time to discuss the most relevant indicators of success with your partner and with your FCM Officer.

'Cross-cutting considerations' are issues such as gender equality or environmental sustainability that underlie everything that is done at the project level. The Proposal should include brief statements on how each cross-cutting consideration relates to the areas of cooperation and it should also explain how your project will address each of them. Expected results and indicators for gender equality should be included. **Tool 13** provides guidelines for integrating gender equality issues in Partnership Projects.

The 'risk factors' are the basic assumptions that are essential to the success of the project. These are usually factors such as political support from councils, the availability of financial resources for related infrastructure development, the availability of human resources for project implementation, and the timely exchange of information.

### Work Plan

In this section of the Project Proposal, the work plan describes 'how' your project will achieve what you want to achieve. FCM's four-stage Institutional Capacity Development Framework, particularly stages 2 to 4, will also help you design your program of activities. Discuss it with your FCM Officer.

The Work Plan sets out a 'program of activities' for your project and a 'time frame' for these activities. In this section, you will list all planned Technical Exchange Missions in Canada or overseas, and Partnership Support Activities that will complement the Technical Exchange Missions. These include staff training, the design of new systems, technical work, and support from municipal associations or private firms. The list of activities should include an Evaluation Mission at the end of the project, which will assess the overall success of the project. It should also include potential Dissemination Activities, such as workshops and case studies, which will widen the impact of your project by sharing the knowledge you have gained with others.

The Work Plan also indicates how 'monitoring and evaluation' will be carried out. For example, a short mission report is expected after each mission to monitor how the project is progressing with regard to expected results.

Finally, the Work Plan should identify the 'management team' that will be responsible for implementing the project for both the Canadian and overseas partners. The team includes the two Local Coordinators (for the Canadian and overseas partners) who have primary responsibility for the project, coordinate all activities and channel communications between everyone involved in the project. The team should also include other members of the project who will be participating directly in project implementation (a project on waste management, for example, will certainly involve key staff from an environment department).

### Budget

The budget indicates the financial resources expected from FCM to implement the project. It should be organized by activity and by fiscal year (April to March). It should also give an estimate of the value of the in-kind contribution from each municipal partner, i.e., the time and other resources (meals hosted, equipment loaned, etc.) provided for the project without charge by each municipal partner. Including the in-kind contribution in the budget gives an indication of the real total value of the project. A template for the preparation of the budget is included in **Tool 14**.



#### Definition

### In-kind Contributions

In-kind contributions are donations of resources such as time, services, goods or materials by the partners while implementing a Partnership Project. If not donated, these resources would have to be purchased.

Participating municipalities, both in Canada and overseas, contribute substantial resources to the FCM Program, mostly by allowing time for leaders and staff to take part in program activities, and sometimes by donating local goods and services. This essential in-kind contribution is recognized by FCM and CIDA in their agreement, and the in-kind contribution of the Canadian partner alone constitutes approximately 35 per cent of the total program budget.

The municipal councils of both partners will then review and, if acceptable, ratify the approved proposal by passing of a council resolution. Once the proposal is ratified, FCM will prepare a Contribution Agreement. This document serves as a legal basis for the transfer of funds between FCM and the Canadian partner and defines the conditions governing project funding. The Project Proposal is attached to the Contribution Agreement as the main reference document for the implementation and follow-up of the Municipal Partnership.

Once the Contribution Agreement has been signed, your project is ready to be implemented!

### What about other Partnership activities outside of the Project Proposal?

Some municipal partnerships develop activities or linkages beyond the ones laid out in the Project Proposal. These activities or linkages are often related to the Partnership Project, but may function quite independently. For example, partnerships have developed pen-pal programs between schools in the partner municipalities, put on community fundraising drives, established formal links between business associations in both municipalities, and arranged for donations of books and materials. These activities are very important to the development of a deeper relationship between partners – one that extends beyond the two municipal administrations to reach out into the communities. Contact your FCM Officer for more information on these activities.

### What happens after the Project Proposal is written?

Once the two Local Coordinators have developed the Project Proposal to their satisfaction (approximately four to six weeks after the project definition mission), FCM will review it. FCM may modify the proposal in light of certain program requirements and may suggest changes based on its experience with other partnerships. Once all required modifications have been made, FCM will approve the proposal.

# 4 Implementing Your Project

## 4.1 Overview

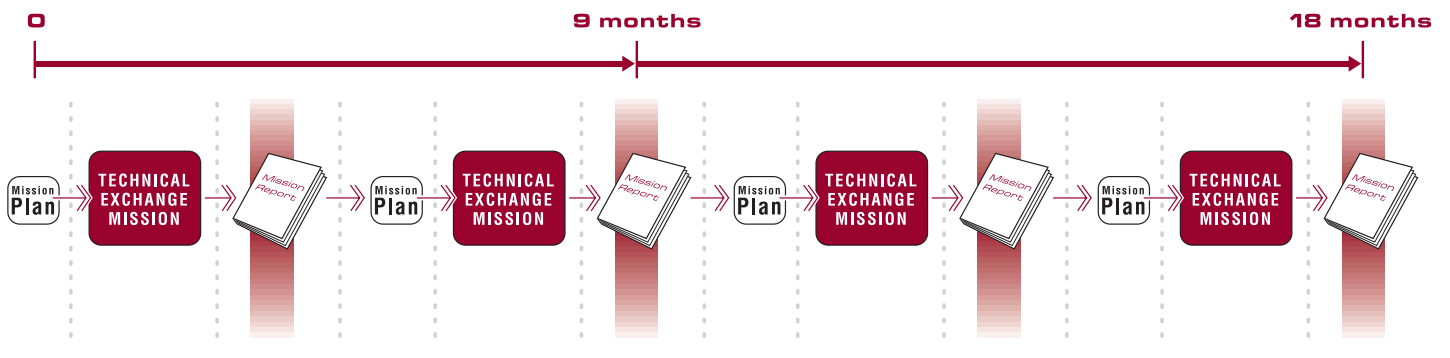
This section of the Guide will help you carry out the activities you and your partner have proposed for your joint Partnership Project. In the Project Implementation Phase, the main activities of your project are carried out according to the plan set out in the Project Proposal. This phase can last from 16 to 24 months. The figure below illustrates the steps of this phase.

## 4.2 Technical Exchange Missions

### What is a Technical Exchange Mission?

A Technical Exchange Mission is a working visit by representatives from one partner municipality to the other to allow for in-depth exchange on a specific technical matter in the project's areas of cooperation. Activities during the Technical Exchange Mission include on-the-job training, technical assistance and coaching.

Figure 4.1: Project Implementation



### Section 4 provides information on:

- Technical Exchange Missions – the main activities of your project;
- Partnership Support Activities – activities that support or complement the Technical Exchange Missions;
- Project monitoring.

Although each Technical Exchange Mission has its own specific objectives, it is not planned or conducted in isolation. Each mission should build upon the results achieved during and since the previous mission. Together, the series of Technical Exchange Missions in a project form a coordinated plan that focuses on addressing the issues you have identified.

The number of Technical Exchanges varies for each project depending on its requirements, but there are usually two or three per year, either to the overseas country or to Canada. The Work Plan section of your Project Proposal lists the number of Technical Exchanges and their specific objectives.



## Illustration

### Objectives of a Technical Exchange Mission

- To develop the Information Technology Plan using a participatory approach across departments;
- To undertake basic data collection in preparation of a Local Development Plan;
- To examine partnerships within the community and to scope partnerships with other educational institutions to support the Local Development Plan.

### What will a Technical Exchange Mission accomplish?

Unlike the two initial missions (Assessment Mission and Project Definition Mission), which concentrated on building a relationship and establishing common interests and priorities, the Technical Exchange Missions focus on the work of the project itself: building capacity. Through training, technical assistance and coaching, each Technical Exchange Mission will contribute to building municipal capacity in the area of cooperation.

Each Technical Exchange Mission will have its own specific objectives. As shown in the example above, the objectives of a mission may deal with more than one area of focus and results can therefore be achieved in several areas.

### Who goes on a Technical Exchange Mission and for how long?

Usually two participants from a partner municipality go on a Technical Exchange Mission. The selection of participants will depend on the nature of the mission, but they are always practitioners working in the specific areas that the mission will address. As the implementation phase of the project focuses on the technical exchange of ideas and experience, mayors and councillors no longer participate in missions, as they did establish political ties and commitment in the inception missions. The Local Coordinator may accompany a Technical Exchange Mission to keep track of the progress of the project. One staff member from the municipal association of the overseas country may also join the group to provide support from time to time. Depending on the project, the missions can range from two to three weeks in length.

### What needs to be done before a Technical Exchange Mission?

In preparation for a Technical Exchange Mission, you will need to prepare a Mission Plan, make travel arrangements, prepare letters of reference, organize pre-departure briefings, distribute the Participant Kits, and have participants read on health issues and challenges of cross-cultural work.

#### Prepare a Mission Plan

The Mission Plan will help ensure that the mission is focused and will achieve specific objectives for the project. Both Local Coordinators work together to prepare the Mission Plan, which will include objectives, expected results and a description of proposed activities. Usually, an update of what has happened since the last mission is also included. The proposed program of activities for the mission can be taken from the Work Plan in the Project Proposal, but should be developed in greater detail. If the activities vary from the proposal, the Mission Plan explains why and how they have changed. The Mission Plan always includes a budget, a description of what each mission participant will do, contact details, and a list of advance preparations. Once the plan is completed, the Canadian Coordinator should send it to FCM. A template for a Mission Plan is provided in **Tool 3** of the Tool Kit at the end of this Guide.

#### Make travel arrangements

The Canadian Local Coordinator will make international travel arrangements for Technical Exchange Missions. See **Section 6 – Useful Information** for details about travel and allowable travel expenses.

#### Prepare a letter of reference to obtain visas if the mission takes place in Canada

Letters of reference assist overseas participants in obtaining visas from Canadian embassies, consulates, or high commissions overseas. The Canadian Coordinator should prepare a letter of reference (see **Tool 9** for an example) and send it to the Overseas Coordinator, who will in turn present it to the appropriate Canadian authorities when applying for visas.

#### Organize pre-departure briefings

Pre-departure briefings on cross-cultural exchanges and working overseas are provided for new participants in your project to enable them to work more effectively on the mission. If need be, FCM and the Canadian Coordinator will arrange these briefings for Canadian participants in cooperation with the Canadian Centre for Intercultural Learning of the Department of Foreign Affairs and International Trade of

Canada. Pre-departure briefings may also be organized for overseas participants prior to their departure to Canada. FCM will set these up in cooperation with partners in the overseas country or through other means. Another option is for the Canadian or overseas Local Coordinator to arrange a pre-departure session himself/herself.

In addition, a few days before departure, FCM will set up pre-departure conference calls for the participants in exchange missions in order to review mission objectives and mission plans.

### Prepare and distribute Participant Kits

Participant Kits are given to each participant on a mission and contain important information and required reporting forms. FCM will provide Participant Kits for the Canadian Coordinator to give to participants in Canada or overseas. The Canadian Coordinator, with the help of the Overseas Coordinator, should customize these by adding partnership-specific material to the kits. This material can include the Project Proposal, the Mission Plan, and a list of municipal staff members involved in the Partnership. Mission participants should read all of the material in the kit, complete the required forms and return them to FCM. The insurance request form is compulsory and must be completed and sent to FCM. No participant can leave on a mission without this insurance.

### Invite participants to read up on health issues and the challenges of cross-cultural work

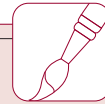
Well-prepared participants will be more effective on a mission. Participants should seek information about health issues and the challenges involved in cross-cultural work that are specific to Municipal Partnerships. Participants should read **Section 6 – Useful Information**. This contains detailed information on health and travel issues, as well as many helpful tips about working on a cross-cultural team.



#### Checklist

### Technical Exchange Mission Checklist

- Prepare a Mission Plan
- Make travel arrangements
- Organize pre-departure briefings
- Distribute Participant Kits
- Read up on health issues and the challenges of cross-cultural work



#### Illustration

### Summary of the Mission Plan for a Technical Exchange Mission

First 2 days upon arrival:

- City tour, introductions, familiarization, review of plans

Following two weeks:

- Meetings with community staff and organizations
- Review of IT Plan
- IT Technical Assistance
- Workshop on community development and environmental management

Final 2 days:

- Wrap-up synthesis, planning for what's next, report writing and preliminary presentation to senior staff

### What happens during a Technical Exchange Mission?

The activities of a Technical Exchange Mission will vary, depending on the mission's technical focus. Each mission is usually divided into three parts: Orientation, Core Activities, and Wrap-up.

#### Orientation

Upon arrival, new participants will be given a brief orientation to the host municipality. A courtesy call is organized with the Mayor or members of Council. The Mission Plan is reviewed and modifications may be made based upon face-to-face discussion with the key members of the project's management team.

#### Core Activities

Activities during the mission focus on technical support. They include meetings, technical seminars, on-the-job training, coaching, and workshops. Different participants may be occupied with different activities, according to their expertise and role in the mission.

#### Wrap-up

The last few meetings of the mission focus on consolidating the results achieved during the mission, and planning necessary follow-up activities. As with the Assessment Mission and the Project Definition Mission, a wrap-up meeting is held, during which the participants and their counterparts in the host municipality will debrief mission activities and results, and identify follow-up activities. The information discussed in this meeting forms the basis for the Mission Report, which can be drafted during the last few days.

### What reports need to be filed after a Technical Exchange Mission?

Within 30 days of the mission, the Canadian Coordinator must file a Mission Report and an Expense Claim with FCM.

#### Mission Report

The Canadian Coordinator should gather impressions and feedback from all the participants in the mission. The narrative mission report will serve as an important reference when preparing for the next mission. A Mission Report template is provided in **Tool 6**.

#### Expense Claim

An Expense Claim should be prepared with supporting original receipts. An expense claim template and complete instructions are provided in **Tool 7**.

### What happens between Technical Exchange Missions?

Some projects may plan Partnership Support Activities (described in the next section) to take place between Technical Exchange Missions. Others may not have scheduled support activities between missions.

Nevertheless, the time between Technical Exchange Missions is important and busy for any project. Each partner municipality must follow up on items identified during the mission. Follow-up may include research, additional training, development of plans or systems to be introduced in the next mission, as well as dissemination of ideas introduced in the Technical Exchange Mission. In addition, there may be some readjustment of the work plan presented in the project proposal. If this is the case, it will require discussion between the Local Coordinators and with your FCM Officer.

It is essential that both partner municipalities maintain communications during this period, even if they are working on separate follow-up activities. It is important that both partners know what is going on in the other municipality. Preparations should also start for the next Technical Exchange Mission.

## 4.3 Partnership Support Activities

Your project proposal may have included some Partnership Support Activities. These are activities that complement the Technical Exchange Missions and support your Municipal Partnership, often by creating linkages with other organizations and institutions. Some of these activities are carried out by

the partner municipalities themselves; for example, local workshops, community campaigns, and equipment purchase, while others may be carried out by institutions such as national and regional municipal associations, universities, and national ministries (the “enabling institutions” described in **Section 2**). These activities include research, workshops, study tours, policy papers, and local level pilots in other municipalities.

Partnership Support Activities are developed in consultation with your FCM Officer at the time the Project Proposal is being discussed. These activities are reported on in each Mission Report.

## 4.4 Monitoring Your Project

Monitoring is an on-going assessment of how your project is progressing in achieving expected results. In your project proposal, you will have set out certain milestones that you hoped to reach at a certain time. When you monitor, you compare what the project has achieved with what was intended for that period. Monitoring can help you identify areas that need to be adjusted or revised, and give you a good picture of your spending and cash-flow needs. Monitoring will help you keep your project on track and increase its potential for success.

Your project proposal will have included some ideas and methods for monitoring your project. This section reviews some key points on monitoring that may be helpful as you implement your project.

### How are missions monitored?

As mentioned above, Local Coordinators may join in a Technical Exchange Mission to keep track of the progress of the Partnership Project. However, even if the Local Coordinators do not accompany the mission, it is still important to monitor the mission to ensure that it is proceeding according to plan.

One way of monitoring progress during Technical Exchange Missions is to make sure that there are regular meetings between the mission participants and the Local Coordinator of the host municipality during the exchange. Such meetings serve as “checks” or opportunities for both participants and the host municipality to ensure that the interests and aims of both parties are being met, and if not, to work out ways in which they can be met.

The wrap-up meeting at the end of the exchange mission is also an important monitoring opportunity. During this meeting, mission participants and members of the host municipality can



## Reminder

### When Monitoring, Flexibility is Key...

Your Project Proposal is not carved in stone. If you find that adjustments need to be made, do not hesitate to consult with FCM.

You will also need to monitor the cross-cutting themes (such as gender equality and environmental sustainability) that you identified in your proposal.

assess the results achieved during the mission, the factors that helped or hindered the achievement of results, and what can be done next. This assessment is an important input into the Mission Report.

### How is the project monitored between missions?

In between the Technical Exchange Missions, Partnership Support Activities may be taking place. At the same time, follow-up activities for the previous Technical Exchange Mission will be initiated, and planning will begin for the next exchange.

Communication during this period is crucial to make sure that the two partner municipalities stay aligned with the same objectives in mind. Since communication is long distance (phone, fax or email), the need for regular communication is even more important. If your partner municipality phones, faxes or emails, make sure that you acknowledge the communication, even if there is no pressing or urgent situation. Otherwise, a sense of isolation may develop for the partner municipality.

**Section 6 – Useful Information** provides more information on communication strategies.

### What monitoring reports have to be filed?

Mission Reports are the primary means of reporting to FCM and provide an opportunity for making formal monitoring reports. When you are implementing your project, you will file a Mission Report for each mission undertaken. Mission participants and other people that were involved in the mission can act as monitoring agents, providing useful information and an assessment of the progress of the project. The Mission Reports themselves can identify a need for more monitoring in particular areas. It is useful for the Local Coordinators in both partner municipalities to contact each other by phone, fax or email to discuss the draft Mission Report.



## Reminder

### Monitoring Tips

- Results don't always show up immediately. It may take a series of exchanges over six months to a year for new practices to be put into effect. Watch for and document small changes that build towards results.
- Results should not be a copy of the Canadian way of doing things. The solutions to local problems should be appropriate for the local situation. Any transfer of technology or knowledge must be adapted to the local context in order to be viable and sustainable.
- Some results may not be anticipated. New concerns may arise as your project progresses, or new policies (e.g., environmental standards and regulations) may be introduced. Be sure to document these unexpected results in your reports.
- Some results may not be fully achieved. The context for municipal cooperation is a complex and changing environment. Don't get discouraged if the partnership doesn't accomplish all the results within the defined time frame. Do analyze the factors that affected the partnership's success.
- Changes in individual thinking may also lead to results. Exposure to new ways of managing municipal business can have long-term effects on members of staff of both partners. One may decide to adapt to his own situation an approach that works well in the other partner's municipality. Partners should talk how their new experience might be applied at home.
- Check to see if benefits reach the people equitably. For example, are women or poor people excluded from project benefits? Are women restricted to the domestic sphere (as neighbour, mother or wife) or are they acting as citizens with their own rights to make demands and participate in decisions that will affect their lives?

# 5 Wrapping It Up

## 5.1 Overview

This section of the Guide will help you bring your Partnership Project to a close. It describes the Project Evaluation and Dissemination Phase, the final phase of your project after the completion of all the Technical Exchange Missions and Partnership Support Activities. In this final phase, both partners evaluate the results of the project and analyze the factors that contributed to or hindered success. Project results are shared with other municipalities. Both partners may agree to apply to FCM to extend their Municipal Partnership and develop a new Partnership Project to address further capacity-building issues. The figure below illustrates the project evaluation and dissemination phase.

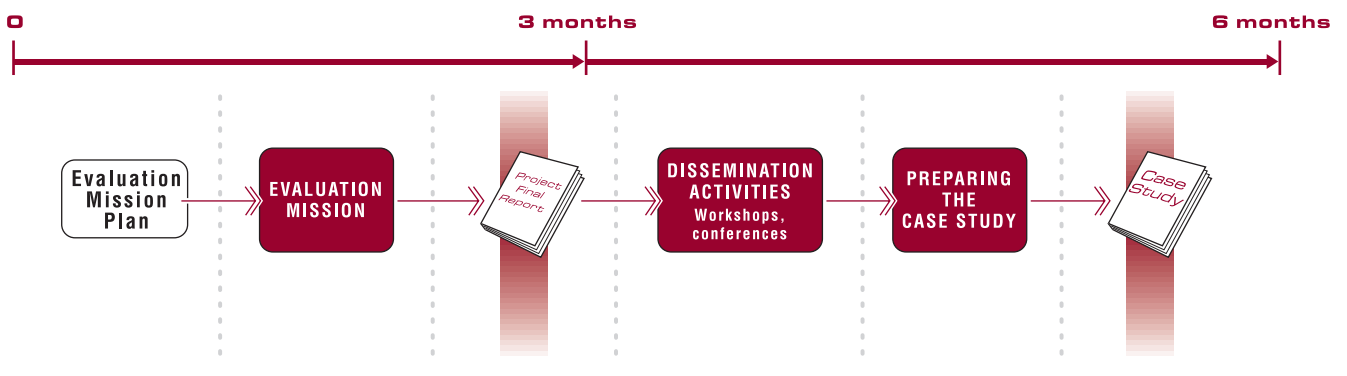
## 5.2 The Evaluation Mission

### What is the Evaluation Mission?

The Evaluation Mission is the final mission in your Partnership Project. It is a joint mission undertaken by the Local Coordinators from both partner municipalities in the overseas partner municipality or city. Its purpose is to assess what your project has achieved overall, particularly in relation to its original objectives and expected final results. It also seeks to analyze the factors that contributed to or hindered its success.

The Evaluation Mission is also an opportunity to evaluate your project for dissemination of results (sharing what you learned) or for replication as a model project (reproducing the same conditions for success in other Partnership Projects for other partnerships).

Figure 5.1: Project Evaluation and Dissemination



### Section 5 provides information on:

- The Evaluation Mission;
- The Project Final Report;
- Disseminating and replicating project results;
- The next steps for your Partnership.

### What will the Evaluation Mission accomplish?

By the end of the Evaluation Mission, the participants should have gathered enough information to:

- Determine what results were achieved, by measuring changes in indicators stated in the Project Proposal;
- Decide whether the project was successful in addressing the issues identified in the Project Proposal;



- Find out what worked well, what did not work so well, and why;
- Document what was learned so that it can be shared with others;
- Identify the essential elements of the project so that it can be used as a model for other municipalities or cities in the region or in the country of work.



#### Reminder

### Evaluate the Cross-cutting Themes!

Your Evaluation Mission is also the opportunity to evaluate how successfully your project addressed cross-cutting themes such as gender equality and environmental sustainability.

### Who goes on the Evaluation Mission and for how long?

The Canadian Coordinator and the Overseas Coordinator participate in the Evaluation Mission. Usually, the Canadian partner will also include a staff member who has worked on the project in the area of cooperation. FCM may also delegate a representative to attend the mission and frequently one staff member from the municipal association of the overseas country will join the group to provide support. Normally an Evaluation Mission will take one week to complete.

### What needs to be done before the Evaluation Mission?

In preparation for the Evaluation Mission, you will need to prepare an Evaluation Mission Plan and make travel arrangements.



#### Checklist

### Evaluation Mission Checklist

- Prepare an Evaluation Mission Plan
- Make travel arrangements

### Prepare an Evaluation Mission Plan

As with all other missions, preparation is the key to success. The Canadian Coordinator will prepare the Evaluation Mission Plan with the help of the Overseas Coordinator and your FCM Officer, using the Evaluation Mission Plan template shown in **Tool 15** of the Tool Kit at the end of this Guide.

The Evaluation Mission Plan begins by providing some background to the Mission, describing briefly the Municipal Partnership, the Partnership Project and the main milestones of the project. The Goal, Objectives and Expected Results of the project, as identified in the original Project Proposal are listed. If your project has changed from its initial conception, then naturally, this section will reflect the changes.

The Mission Plan then states the Objectives of the Evaluation Mission. The next section, the Data Collection Plan, describes the ways in which you will measure the expected results (what methodology you used to evaluate the mission, e.g., interviews, documentation review, observation or focus groups). Details should be given as to who will be responsible for data collection and from whom, and when the data will be collected. Take care to include women in your data collection plan so that you can identify the effects project activities had on them.

The Mission Plan always includes a budget, a description of what each mission participant will be doing, contact details and a list of any necessary advance preparations.

### Make travel arrangements

The Canadian Coordinator will make international travel arrangements and the Overseas Coordinator will make local travel arrangements.

### What happens during the Evaluation Mission?

The Evaluation Mission is usually divided into three parts: Finalize Plans, Data Collection, and Data Analysis and Draft Report.

### Finalize Plans

The first day of the five-day mission is usually spent in finalizing the arrangements for the rest of the mission. The Mission Plan is reviewed and modifications may be made based on face-to-face discussion. Details are worked out, such as who exactly should be met and where interviews will take place.

### Data Collection

The next three days are then devoted to collecting the information needed; this can be done through interviews,

focus groups, workshops, documentation review or observation. As with Technical Exchange Missions, there may be meetings with senior officers of key departments in the municipality, local experts, community groups, as well as other organizations or institutions. There may also be field visits to observe changes.

### Data Analysis and Draft Report

The final day and a half at minimum should be spent analyzing and interpreting the information gathered during the evaluation. Mission participants (i.e., the two Local Coordinators, FCM's representative and the staff member from the municipal association) will debrief and pool their impressions. Sometimes, further clarification is required on certain matters, and if this is the case, plans are made as to how to obtain the required information. During these final days, the Project Final Report is drafted.



#### Reminder

#### Evaluation Mission Tips

- Record all the information you are collecting in a systematic way.
- Remember to disaggregate the data for gender.
- It is better to ask women directly than to ask men or elected officials to answer for women regarding the benefits of the project or the way the activities were conducted.
- If there are a number of team members conducting interviews or collecting information in different ways, meet each evening to debrief together and share impressions.

### What reports need to be filed after the Evaluation Mission?

Within 30 days of the Evaluation Mission, the Canadian Coordinator must file:

#### Project Final Report

This report will include input from the Overseas Coordinator. The Project Final Report is discussed in detail below.

#### Expense Claim

An Expense Claim must be submitted with original supporting receipts. An Expense Claim template and detailed instructions are provided in **Tool 7**.

### What happens after the Evaluation Mission?

Once you have finished writing the Project Final Report, you can move into the dissemination stage of your project. In consultation with FCM, you will carry out Dissemination Activities based on the recommendations in your report. Finally, you will make plans with FCM to either continue or bring your Municipal Partnership to a close.

## 5.3 The Project Final Report

### What is the Project Final Report?

The Project Final Report is the document that reports on your entire Partnership Project. It is the record of what your Municipal Partnership has accomplished, and will serve as the official history of the project. Just as the Project Proposal was the reference document for project implementation, the Project Final Report is the reference document for project achievement and contributing factors. The Project Final Report will be the key report to your council, to FCM, and other organizations or individuals interested in your project.

### Who writes the Project Final Report?

The Canadian Coordinator, with the help of the Overseas Coordinator, writes the Project Final Report. Others who have been involved in project activities can also provide input.

### What is in the Project Final Report?

The Project Final Report should not be a lengthy document (around 5 to 10 pages) but should include the following six sections:

#### Background

As with the Project Proposal and the Evaluation Mission Plan, the Project Final Report should begin with a brief description of your partnership and your project.

#### Project Objectives and Expected Results

In this section you should briefly describe the original goal, objectives and expected results of your project. This can be taken from the original project proposal and adapted if the project was modified during its implementation.

#### Evaluation Methodology

In this section, you should describe briefly how you evaluated the extent to which your project achieved its results. Describe

how you collected and disaggregated data, how you analyzed the data you collected, and any limitations in your data and its analysis. Disaggregated data on gender and environment results should also be collected.

### Findings and Conclusions

This is the most important section of the report. In this section, you should present your interpretations and conclusions of the analysis of the data you collected. You will assess to what extent municipal capacity has been developed in the area of cooperation, based on your original objectives and expected results. You will also assess to what extent the life of citizens in the municipality has changed as a result of the project. The results achieved by the project should be compared to the results originally expected. Sometimes the results will be less than expected, sometimes more. In this section you should also discuss the constraints or obstacles that affected the project's success and the measures you took to address them.

Although many of the direct results of a partnership project are seen in the overseas partner municipality, changes will also occur in the Canadian partner municipality. In this section you should include an assessment of project impact in Canada.

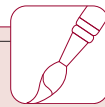
Finally, you should also describe the extent to which the project achieved results with respect to the cross-cutting themes of the project.

### Recommendations

In this section, you should extract the lessons learned from the project and show how they might apply to other municipalities and cities or other Partnership Projects. You might identify certain practices that can be replicated in another project or in another municipality. You might suggest ways of sharing the knowledge gained during your project with other municipalities, whether it is through training courses, workshops or conferences. You might recommend that a case study be written on a particular aspect of your project to illuminate certain factors or points. You might also see the need for a second phase for your project and indicate the areas of focus.

In this final section, you can include any other relevant information that will illustrate how and what your project has achieved. Many municipal partners include newspaper articles, photographs or videos as annexes to the report.

A template for a Project Final Report is provided in **Tool 16**. **Tool 17** presents examples of Project Final Reports prepared by municipal partnerships.



Illustration

### Table of Contents for the Project Final Report

1. Background
2. Project Objectives and Expected Results
3. Evaluation Methodology
4. Findings and Conclusions
5. Lessons Learned and Recommendations
6. Annexes

### What happens after the Project Final Report is written?

Based on recommendations in your Project Final Report, you can, in consultation with FCM, move on to deliver a Dissemination Activity. You will also make plans to either continue or bring your Municipal Partnership to a close.

## 5.4 Disseminating Project Results

Your activities over the past two years have probably resulted in interesting new management practices. Together, you may have developed new ways of preparing a waste management plan, new human resource management practices or new building permit procedures.

Each Municipal Partnership usually organizes one Dissemination Activity at the end of the Partnership Project to share lessons learned or project results with other municipalities or cities. Dissemination activities are important to expand the results of your partnership to other municipal governments in nearby areas or in the country. In your Project Final Report, you will have made some recommendations about how to share the results or lessons learned from your project. Both Local Coordinators should confirm with FCM their plans for a Dissemination Activity.

The activity may take the form of a conference, a workshop or series of workshops, or a publication. Sometimes a dissemination activity can be organized to coincide with the end of the evaluation mission, while the Canadian delegation is in the overseas partner municipality. The partner municipalities can carry out the activity themselves or in conjunction with other institutions such as the national association of local government, a ministry department or research institute.

If the project is successful, a case study may also be written and distributed through FCM's international network (see **Tool 18** for guidelines on writing case studies and **Tool 19** for examples of case studies). FCM will usually mandate a consultant or an organization to write the case study. In some cases, a successful project may become a model project that is replicated in another overseas municipality, either with a Canadian partner or a local partner.

## 5.5 Next Steps for the Partnership

### How do you continue the Municipal Partnership after the end of a project?

Your project evaluation will help you decide if you wish to continue your Municipal Partnership. You may feel that much more work remains to be done to fulfill your original objectives. Or you may feel that the results achieved by your project will have greater impact if a second phase of your project were to be implemented. The input and consensus of both partner municipalities are essential in deciding whether to continue a partnership, and if you do decide to continue, in which direction it will move.

The recommendations in your Project Final Report will form the basis for further discussions between FCM and the Canadian and Overseas Coordinators. If the decision is made to continue the partnership, then a Project Proposal must be prepared, following the same procedures as before. This is the case even if your recommendations were for a "second phase" of the original project.

### How do you wrap up the Partnership?

Your Project Final Report may recommend that your Municipal Partnership end once the Dissemination Activity has been completed. Sometimes, even though there are still many opportunities to build on what has been achieved, your municipality may not wish to continue the partnership because of time or financial constraints.

Whether you continue your Municipal Partnership or not, and whether you achieved all the results you expected in your Partnership Project or not, by reaching this final phase of your project, your Municipal Partnership has made a contribution to municipal international cooperation.

Your project will have had an impact on the quality of life of many citizens, by improving municipal capacity and from that, municipal performance, in the area of cooperation. The lessons learned from your project will be disseminated and will contribute to the improvement of municipal capacity and performance in other municipalities. Participants from both municipalities will have gained first-hand experience of working with their peers in another country. They will have established relationships, and exchanged ideas and insights, of a technical, cultural or professional nature.

Congratulations and thank you for your contribution to international municipal cooperation!

# 6 Useful Information

## 6.1 Overview

This section of the Guide provides information on various topics that you will find useful at all stages of your Partnership Project.

**Section 6 provides detailed information on:**

- Financial administration;
- Communication strategies;
- Health information;
- The challenges of cross-cultural work.

## 6.2 Financial Administration

This section provides information on the financial administration of your Partnership Project. It will explain how project funds are transferred, the requirements for financial reporting, and which expenses are reimbursable for your project.

### How are project funds transferred?

Once your Project Proposal and its budget have been approved, the Contribution Agreement between FCM and the Canadian partner will provide the legal basis for a transfer of funds and define the conditions governing project funding. Advance payments may be provided on a

mission-by-mission basis. If advance payments will be required, please discuss this with your FCM Officer.

All advance payments (where applicable) as well as payments made for the reimbursement of expenses incurred during the project are made directly to the Canadian partner municipality. No reimbursements are made directly to individuals working with or for the partner municipality.

### What are the requirements for financial reporting?

#### Expense Claim

The Canadian Coordinator is responsible for filing an Expense Claim (see **Tool 7** of the Tool Kit at the end of this Guide) within 30 days of each mission or project activity. Each Expense Claim should detail actual expenses incurred versus budgeted expenses. Individual participant travel receipts, along with an in-kind contribution report and all other supporting documentation, should be attached to the Expense Claim. Claims received after 30 days may not be reimbursable.

Only original supporting documentation (invoices, receipts) is accepted for the reimbursement of expenses. It is a CIDA requirement that all original supporting documentation be kept by FCM for audit purposes.

Participants must keep currency exchange receipts in order to calculate the Canadian dollar amount of expenses in their Expense Claim. Only one exchange rate for each country should be used in an Expense Claim. If currency is exchanged more than once while travelling in a given country, the average rate from the exchange receipts should be used. If no currency exchange receipt is attached to the travel claim, FCM will use the average rate as per the Bank of Canada for the period of travel.

#### Goods and Services Tax (GST)

Canadian Municipal partners are entitled to claim the GST rebate for the GST paid/payable on their travel and project-related expenses incurred for the Partnership Program. Thus, the Canadian municipality should claim the GST rebate for its travel and other project-related expenditures incurred in



#### Reminder

#### Foreign Exchange Rates

For the latest rates, visit the Bank of Canada's Internet site:

[www.bankofcanada.ca/en/exchange-look.htm](http://www.bankofcanada.ca/en/exchange-look.htm)

For foreign currencies that are not listed there, visit:

<http://www.oanda.com/convert/classic>

Canada and the net expenditures must be submitted to FCM for reimbursement. FCM will reimburse expenditures up to the net amount incurred by the municipality (i.e., the gross amount of the expense less the municipality's GST rebate). Please note that GST is not applicable to expenses incurred outside Canada.

### What travel expenses are reimbursable?

This section lists the expenses that will be reimbursed by FCM for your Partnership Project. The majority of reimbursable expenses are travel expenses, but some other expenses are covered as well. These are listed in detail below.

Municipal Partnerships are required to follow the guidelines for travel expenses issued by the Treasury Board of Canada. The guidelines ensure that all participants are treated consistently and are available at [www.tbs-sct.gc.ca](http://www.tbs-sct.gc.ca). Travel reimbursements do not constitute income or compensation for personal gain.

The following travel expenses are reimbursable:

#### Visas

FCM covers the cost of visas and costs incurred to obtain visas for the host country and the stopover country, when required. FCM does not cover the cost of passports or passport photos.

#### Health Insurance and Vaccinations

FCM covers the cost of health insurance and required vaccinations for entry into and travel within the country where the exchange will take place. Please refer to the section on Health Information for further information.

#### Air Transportation

The standard for air travel is economy class. Airfares must be booked using the most direct routing, the lowest fare under the circumstances, and where possible, the services of Canadian carriers. FCM will reimburse up to a maximum of full fare economy airfare. First class or business class airfare is NOT reimbursable under any circumstance.

For reimbursement, you must submit the remaining parts of the original airline tickets (or the electronic tickets, if no paper tickets are issued) and the travel agent's invoice. Also submit boarding passes and other corroborating documents (airport tax receipt, hotel receipt) indicating that the trip was taken.

Travel itineraries should provide for a suitable rest period, and/or an overnight stop when routes exceed nine consecutive hours of travel time. Where a stopover is necessary, one night's accommodation and meal expense is reimbursable as per the Treasury Board Guideline rates for the country of stopover.

### Accommodation

The standard for hotel accommodation is a single room, in a safe environment, conveniently located and comfortably equipped. Options for accommodation include hotels, motels, corporate residences, apartments and private non-commercial accommodation.

Only the cost of the room and applicable taxes will be reimbursed. FCM will not reimburse expenses for mini bar use, laundry, telephone, films, or room service charges. Participants will be responsible for covering hotel costs if they fail to cancel a guaranteed reservation.

Participants who choose private non-commercial accommodation shall be reimbursed according to the rate as specified by the Treasury Board Travel Directive, as amended from time to time. If using private accommodations, the cost of ground transportation plus the cost of the private non-commercial accommodation should be more cost effective than available commercial accommodation plus its associated ground transportation costs.



#### Reminder

#### How to Find Accommodation

Refer to the "Accommodation and Car Rental Directory for Government Employees" for reasonable accommodation selection, location and cost. Costs for accommodation that exceed the costs listed in the government directories may be disallowed.

This directory can be found at the following web site:

[www.hcrd.gts.gc.ca](http://www.hcrd.gts.gc.ca)

### Meals and Incidental Allowance (Per Diem Allowance)

A meal allowance will be provided for each breakfast, lunch and dinner to a participant on travel status for the Partnership Project. A participant must be outside a 16-kilometre radius from his/her workplace to be considered on travel status. For partial days on travel status, partial meal allowances are provided (i.e., if the participant is on travel status starting at noon, the meal allowances for that day will begin with the lunch, and not the breakfast, meal allowance).

Where no meal allowance has been established in a given country, or where sudden changes in currency exchange



## Reminder

### Where to Find Up-To-Date Meal and Incidental Allowances

The Treasury Board rates for meal and incidental allowances are listed in Appendix C (Canadian/US rates) and Appendix D (international rates) of the Travel Directive. As these are amended from time to time, please refer to the following web site:

[www.tbs-sct.gc.ca/travel/travel\\_e.asp](http://www.tbs-sct.gc.ca/travel/travel_e.asp)

rates or high inflationary trends may invalidate the specified meal allowance, actual and reasonable expenses shall be reimbursed, based on original receipts.

A meal allowance will not be paid to a participant for a meal that is provided (i.e., meals provided on flight, meals provided by the host partner). In exceptional situations where a participant has incurred out of pocket expenses to supplement meals provided, the actual incurred costs may be reimbursed, based on receipts, up to the applicable Treasury Board meal allowance.

Where a participant incurs meal costs that are higher than the established meal allowances in situations outside the participant's control, the actual and reasonable expenses incurred for all meal expenses on that travel day will be reimbursed, based on original receipts and a written explanation of the situation.

The cost of bottled water shall be reimbursed in situations in which it is deemed necessary. FCM will reimburse Canadian participants for reasonable quantities of bottled water purchased in the foreign country, based on submitted receipts.

An incidental allowance is provided for each day or partial day that the participant is travelling for the program and is

staying in overnight accommodations. The allowance is intended to cover, but is not limited to, items such as gratuities, laundry, dry cleaning, depreciation of luggage and other personal supplies and services for which no other reimbursement is provided. Please note that a partial day does not include days where a late-night flight arrives at your home destination area after midnight.

When a participant visits locations in different countries on the same day, the incidental expense allowance paid will be based on the location where the day commences.

### Transportation

Local transit (bus, streetcar, subway) or airport services should be used whenever available and practical.

Taxis are only authorized when local transit is not available or practical. Taxi charges incurred require original receipts for reimbursement; therefore, it is recommended that participants carry a receipt book with them. Taxi charges claimed should detail the point of origin and destination for all trips.

Rented vehicles are allowed only in exceptional circumstances. Your FCM Project Officer must approve such rentals in advance.

Private vehicles may be used only when practical, economical, and when other means of transportation are not available. Participants must use the most direct road routes and should only claim the kilometres driven for project-related activities. The kilometric rates reimbursable for the use of private vehicles is in accordance with the Treasury Board Travel Directive, Appendix B, which can be found at: [www.tbs-sct.gc.ca/travel/travel\\_e.asp](http://www.tbs-sct.gc.ca/travel/travel_e.asp).

### Other travel expenses

Other reimbursable travel expenses include Airport Departure Tax, Airport Improvement Fee, commissions incurred in converting reasonable sums to/from foreign currencies, and costs incurred to purchase reasonable sums of travellers' cheques.

### Are there other expenses that can be reimbursed?

Some other expenses that are directly related to the implementation of the Program may be reimbursable. Local Coordinators must obtain prior approval from their FCM Officer before claiming such costs, and original receipts must accompany claims.

#### Other reimbursable expenses include:

- Communication costs such as long-distance telephone and facsimile charges, and courier charges;



## Reminder

### Original Receipts...

You must submit original receipts for all expenses to be reimbursed.

You must submit the remaining parts of the airline tickets and boarding passes.



## Reminder

**Reimbursable expenses include:**

- Visas for the host and stopover country (not the passport cost)
- Vaccinations – those required for the country of travel
- Economy class airfare (with one night accommodation and meal if a stopover is necessary)
- Meals and incidentals - per diem allowances
- Hotel accommodation - hotel room and taxes only
- Local transit, airport buses
- Taxis, when nothing else is available or practical
- Car rental in exceptional circumstances – must be approved by FCM beforehand

**Other expenses:**

- Airport fees (departure tax, improvement fees)
- Costs of currency exchange (commissions)
- Bottled water when deemed necessary

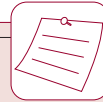
**Non-reimbursable expenses include:**

- All personal travel expenses (transportation, accommodation, meals, incidentals, photos, film)
- Personal communication costs (home telephone calls or Internet charges)
- Gifts, hospitality costs, entertainment
- Alcohol

- Translation and word processing costs;
- Printing and production costs.

Certain expenses relating to Partnership Support Activities may also be reimbursable. Local Coordinators should consult their FCM Officer for further details on the following:

- Purchase, rent and transport of equipment, vehicles and supplies;
- Development and implementation of training programs;
- Support for collaboration with community organizations (activities reinforcing community participation in problem-solving or local decision-making).



## Reminder

**Useful Internet web sites**

Hotel accommodation (Accommodation and Car Rental Directory for Government Employees):

[www.hcrd.gts.gc.ca](http://www.hcrd.gts.gc.ca)

Treasury Board of Canada Secretariat:

[www.tbs-sct.gc.ca](http://www.tbs-sct.gc.ca)

Meal and incidental allowances:

[www.tbs-sct.gc.ca/travel/travel\\_e.asp](http://www.tbs-sct.gc.ca/travel/travel_e.asp)

(Appendices C & D)

Use of private vehicles:

[www.tbs-sct.gc.ca/travel/travel\\_e.asp](http://www.tbs-sct.gc.ca/travel/travel_e.asp) (Appendix B)

Currency exchange:

Bank of Canada:

[www.bankofcanada.ca/en/exchange-look.htm](http://www.bankofcanada.ca/en/exchange-look.htm)

Oanda: <http://www.oanda.com/convert/classic>

**What expenses are not reimbursable?**

Expenses incurred by a participant for personal reasons are not reimbursable by FCM. Such expenses include, but are not limited to:

- All personal travel expenses such as accommodation, meals and incidentals, entrance fees, photos, film, and batteries;
- Personal communication costs – i.e., telephone calls and Internet charges home;
- Gifts, hospitality or entertainment expenses;
- Alcohol.

## 6.3 Communication Strategies

Effective and consistent communication between the Local Coordinators of the Municipal Partnership is the cornerstone of success for a project and partnership. Furthermore, it is equally important to ensure that other stakeholders know what is happening in terms of progress (or lack of it). This section will help you get your message across to the key stakeholders in your Partnership Project: your counterpart Local Coordinator, the Mayor and Council, other municipal



staff members (senior management staff and individual project leaders), the local media, and the community at large.

After you have developed the specific Work Plan for your Partnership Project, you may want to formulate a Communication Plan. Discuss this plan with your counterpart Local Coordinator during the Assessment and Project Definition Missions. The purpose of your Communication Plan is to provide the stakeholders involved in your project with critical updates at pre-determined times. This way, everyone involved will know what is happening.

When developing your Communication Plan, ask yourself:

- Who needs to be informed?
- How often should you communicate with this person or group of people?
- How much information needs to be given?
- What is the best way of communicating the information?

With a strong Communication Plan, you can expect your Municipal Partnership to be a rewarding experience for all involved. Moreover, you can create a greater sense of project ownership among stakeholders.

### What are the best ways to communicate with key stakeholders?

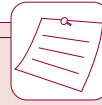
Here are some tips for communicating with the key stakeholders in your project:

#### Your counterpart Local Coordinator

Ensure that you communicate at least once a month, preferably electronically, even if it is just to say hello. Use these communication opportunities to report to each other on progress or issues that may have arisen in relation to your project, since the majority of work is done between Technical Exchange Missions.

#### The Mayor and members of council

You should provide written updates on project status on at least a quarterly basis and make sure that these updates form part of the regular council agenda. Ensure that whenever a Technical Exchange Mission occurs, members of council are invited not only to attend, but also to actively participate in work sessions and, if applicable, any social interactions. Also, ensure that the mission participants address municipal council at an open meeting to report on the exchange mission in particular and the program in general. This keeps council informed and may also provide for additional media coverage.



#### Reminder

### General Tips on Communication

It is not enough to just do a good job; the right people need to know that a good job has been done.

- Limit information to no more than 2-3 pages, focusing on the salient points of what you want to communicate. Most Municipal Councils and employees deal with an enormous amount of paper on a regular basis and large packages of information rarely motivate people to read on. Communications that are too brief, on the other hand, can also be detrimental.
- Focus only on what people need to know, not what would be nice for them to know.
- Develop your message according to your target audience. Advise your audience that you can forward additional material upon request.
- Maintain a logbook of all communications. This logbook can serve as important data when reporting to FCM.
- Be consistent about the content of your message. When people hear the message often enough, they will remember and believe it.
- Communication should be in writing wherever possible.
- Report on your milestones and celebrate your successes.

#### Other municipal staff members

Ensure that whenever Technical Exchange Missions occur, there is time built in for participants to interact with other municipal staff who may not be part of the partnership program. This may simply be by attending a department or division staff meeting and presenting the outcomes or expectations of that particular mission.

#### The community at large

If possible, at social functions or as part of Technical Exchange Missions, ensure participation from community members, family, and friends. This type of interaction promotes a greater understanding of other cultures.

#### Local media

Before Technical Exchanges Missions, distribute press releases to local media outlets advising when the mission will occur, who is participating, and what you expect to accomplish during the mission.

During the mission, arrange for local media to conduct interviews with visiting mission participants in order to provide the community with a third-party perspective on the project.

A press release to the local media is an excellent method of getting your message out there. Always ensure that you identify the primary contact for follow-up information at the end of each release, including a contact phone number, fax, and email address.

### What information resources are available for communicating with stakeholders?

All the plans and reports (including your Project Proposal) that you prepare for FCM will contain information that you can use in communicating with key stakeholders. You will, of course, have to pick and choose and summarize the information of interest to the stakeholder with whom you are communicating. **Section 1, Benefits of Municipal Partnerships**, provides a summary of benefits for both the Canadian and the overseas partner municipalities, which may be a quick and useful reference.

FCM-ICMD's interactive web site, located at [www.icmd-cimdc.ca](http://www.icmd-cimdc.ca), also provides interesting information on Municipal Partnerships that you may want to share (for example, successes in a particular area of cooperation, or other partnerships with municipalities in the same overseas country). Visit the Becoming an ICMD Partner section of the website to find resources for your partnership and to share your experiences with others.

Finally, your FCM Officer is a good information resource, who can provide many more detailed examples.

## 6.4 Health Information

Although it is unlikely that you will meet with health problems or emergencies while on a mission for your Partnership Project, it is important to be prepared.

This section provides information for both Canadian participants going overseas, and for overseas participants coming to Canada. It is divided into three sections:

- Tips on staying healthy that will be useful for both Canadian and overseas participants;
- Health information specific to Canadians going overseas;
- Health information specific to overseas participants visiting Canada.

Please take your health seriously – before you leave and while you are on mission. We want you to have a productive experience that is not hampered in any way by ill health.

### How to stay healthy on a mission

When you travel on a mission, you will be travelling a long distance in an airplane, coping with drastic time differences, and following a busy itinerary in an unfamiliar environment. These situations can be very stimulating, but they can also be stressful to your health. The following information is general advice on how to adapt to these situations without affecting your health.

#### During the flight abroad

To begin the process of adaptation, take the following precautions when on the flight:

- Wear loose clothing and comfortable shoes, since the body has a tendency to swell in pressurized cabins;
- As soon as you are on board, set your watch to the local time at your destination, and adjust your activities, such as eating and sleeping, accordingly;
- Drink a lot of water, juice and other non-alcoholic fluids to prevent dehydration caused by the dry air in the cabin. Avoid caffeine and alcohol;
- Take light meals. Don't eat if you are not hungry;
- Do not hesitate to walk around or do some exercise at your seat to facilitate blood circulation.

#### During your stay in a new country

New food and stress can lead to intestinal disorders. In case of diarrhoea, avoid fresh fruit, vegetables and milk products. Drink lots of fluids and gradually go back to eating solids like rice, bananas and soda biscuits. It is strongly recommended that travellers to developing countries drink bottled water. Tap water in Canada is safe to drink.

Time differences, work pressure and cultural shock can all contribute to increased stress, which in turn can lead to fatigue, anxiety, concentration problems and increased susceptibility to illness. To reduce stress:

- Exercise regularly. Walk to meetings, use hotel recreation facilities or do stretching exercises in your room;
- Take time to relax every day;
- Eat well-balanced meals and drink lots of fluids. Reduce the amount of food, alcohol and coffee you consume;
- Discuss your feelings with your colleagues. They are probably feeling the same way. If necessary, ask to reduce the pace or workload.

#### The danger of AIDS

AIDS is a fatal illness that can take up to seven years to be detected. To protect yourself and others:

- Avoid putting yourself in a situation where you could lose control or stop thinking clearly (for example, by drinking too much);
- Practice "safe sex". Always use latex condoms during any sexual contact that involves penetration;
- Please don't think this advice does not apply to you. Being far away from home, having lots of time alone and the intimacy of shared experiences can lead people to act in unusual ways;
- Remember AIDS is transmitted in only three ways: sexual intercourse with an infected person when no condom is used; contact with contaminated blood; and using contaminated needles.

### What health information should Canadians going overseas get?

This section includes general information on health for Canadians going overseas on a mission.

#### Health insurance for missions overseas

All Canadian participants going overseas on a mission for a Municipal Partnership are required to have medical and emergency insurance. The cost of the insurance is fully covered by FCM. The FCM Health Plan for Canadian Participants has been written to CIDA's specifications and supplements (but does not replace) the benefits available through provincial health care plans. It is essential that you maintain active coverage under your provincial plan at all times.

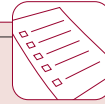
The Canadian Coordinator will make sure that application forms for all mission participants are sent to the insurance company so that each participant will receive a Certificate of Insurance prior to departure. FCM will not authorize your trip until your insurance coverage has been confirmed.

#### Health preparations before a mission

Before you leave on your mission overseas, take the following precautions to help you keep healthy while overseas:

Visit your local travel clinic for the latest health advisories. Health concerns change rapidly, and the travel clinics will advise you on precautions that you need to take.

See your doctor and dentist at least eight weeks before departure. Make sure there are no health problems that will hamper your trip overseas. Make sure you have up-to-date immunizations for tetanus, diphtheria and polio, as well as measles, mumps and German measles. FCM does not pay for these inoculations but recommends that you have them.



#### Checklist

##### Health Checklist

- Visit your local travel clinic
- See your doctor and dentist
- Fill in the Health Personal Info Booklet
- Read the information in your Participant Kit
- Make sure you bring what you need

Fill in the Health: Personal Info Booklet in your Participant Kit and carry it with you on your mission. Be sure to include the address and phone number of the Canadian Embassy or High Commission in the People to Contact in an Emergency section. If information on quality medical facilities and emergency services is not available before departure, please obtain this information upon arrival in the host country. The Canadian Embassy or your counterparts should be able to provide this information.

Read the health information in your Participant Kit. There will be useful supplementary information provided in your kit on how to stay healthy while travelling in a developing country.

Make sure you take your immunization information card or booklet, an extra pair of glasses or contact lenses, an adequate supply of any prescription medication you take (as well as a copy of your prescription with the generic name of the drug), your certificate of insurance (wallet card) and a supply of claim forms and the Partnership Health Kit (see box below). FCM will cover the cost of preparing and maintaining one kit per partnership.

#### Seeing a doctor while overseas

Unless it is dangerous to delay treatment, go to recommended facilities (In your Health: Personal Info Booklet, see the Quality Medical Facilities and Emergency Services in Host Municipality section). You may have to insist on your preference for a treatment facility. If you feel that the local services are not adequate, do not hesitate to ask to be taken to another accredited facility, usually in the capital city. Rapid transportation can sometimes be crucial. If there are no appropriate transportation services for injured persons, use a taxi or private vehicle (the cost of transportation is reimbursable as described in **Section 6**.).

Make sure you take your certificate of insurance with you if you go to a doctor, hospital or clinic, and that you complete



## Checklist

### The Partnership Health Kit

- Iodine tablets, tincture of iodine or any other chemical solution for contaminated water (Coghlan's)
- Oral rehydration salts (ORS, Gastrolyte)
- Medication for mild diarrhoea (Imodium, Lomotil)
- Antibiotic for severe diarrhoea (Cipro, Septra, Noroxin)
- Medication to prevent nausea (Bonamine, Gravol, Stemetil)
- Antacid (Maalox, Diovol, Gelusil)
- Insect repellent with up to 30% DEET (Muskol spray)
- Factor 30 sunscreen
- Ointment for burns and itching (Solarcaine, Calamine)
- Fever/pain reliever (Ibuprofen, ASA, acetaminophen)
- Antihistamine (Benadryl, Claritin, Chlortripolon)
- Decongestant (Coricidin D, Sinutab, Sudafed, Otrivin spray)
- Antiseptic (Betadine, Dettol, Hibitan)
- Topical antibiotic cream (Bactroban, Fucidin, Polysporin)
- Laxative (Fibyrax, Colace, Senekot)
- Treatment materials for wounds and injury (Band Aids, gauze squares, adhesive tape, elastic bandage)

the claim form. The insurance company cannot reimburse costs if the claim form is not filled out completely.

### Emergencies while overseas

If an emergency medical situation occurs and the required treatment is not available, FCM's insurance plan provides coverage for evacuation to the nearest appropriate medical facility or to Canada. However, the evacuation must be authorized in advance by FCM and the company contracted to do the evacuation.

Contact FCM and the evacuation company immediately. FCM will ensure that the injured person's family or the persons named as emergency contacts are notified. The evacuation company will control the treatment provided, maintain contact with the injured person, as well as arrange for travel back to Canada when it is required.

The Canadian Embassy may also be helpful. If you cannot reach the Canadian Embassy or High Commission, we recommend that you contact the British, American or French Embassy.

Please review the insurance booklet for more detailed information on coverage, and instructions on the steps to follow for emergency medical assistance or evacuation.

### What health information should overseas participants visiting Canada get?

This section includes general information of concern to overseas participants visiting Canada on a mission. It is unlikely that you will experience major health problems during your stay in Canada, but please read this section carefully so that you know what to expect.

#### Health insurance for missions to Canada

While on mission to Canada, overseas participants will have health care coverage through the CIDA Health Care Plan. There is no cost to the participants for this coverage. The coverage is equivalent to basic health coverage in any Canadian province and also provides many additional benefits. All exchange participants must be registered for insurance during the mission to Canada.

At least four weeks prior to departure, the Overseas Coordinator will complete CIDA Health Care Registration Forms for each participant and send them to the Canadian Coordinator, who will forward the forms to FCM. FCM will register the participants, and send the CIDA Health Care Plan Package for each participant to the Canadian Coordinator. When participants arrive in Canada, they will receive this package from the Canadian Coordinator. The package contains a membership certificate, an information guide, and claim forms.

#### Health preparations before the mission to Canada

To reduce the likelihood of health problems while on mission in Canada, before leaving, you should:

See your doctor and dentist at least eight weeks before departure. Make sure there are no health problems that would hamper your trip to Canada. Insurance coverage does not provide payment for expenses that result from a pre-existing condition. As dental care is very expensive in Canada, have any required dental treatment done before leaving your country. The CIDA Health Care Plan will cover emergency dental services only, and only for the specific tooth or teeth requiring treatment at the time of the emergency examination. Only the most basic treatment for relief of pain and infection is covered.

Contact the Canadian Embassy, Consulate or High Commission for medical requirements for entry into Canada. No vaccination is required for entry to Canada as of the date of publication of this Guide. However, this requirement may change without notice. Contact the Canadian Embassy, Consulate or High



## Checklist

**Health Checklist for Overseas Partners**

- See your doctor and dentist
- Contact the Canadian Embassy, Consulate or High Commission
- Fill in the Health Personal Info Booklet
- Make sure you bring what you need - such as documents, any medication or other personal necessities
- Bring enough warm clothing

Commission several weeks before departure to confirm. FCM recommends that you get booster shots, if needed, for tetanus, diphtheria and polio (Tdpolio), and for measles, mumps and German measles. The cost of these inoculations is not covered by your insurance or by FCM. If you will be stopping over in other countries during your trip, make inquiries about the vaccination requirements for each country. Be sure to bring your vaccination card with you.

Fill in the Health: Personal Info Booklet in your Participant Kit and carry it with you on your mission.

Make sure you take your immunization information card or booklet, an extra pair of glasses or contact lenses, an adequate supply of any prescription medication you take (as well as a copy of your prescription with the generic name of the drug), your certificate of insurance (wallet card) and a supply of claim forms.

Bring enough warm clothing. Except for the Pacific Coast, Canadian winters are harsh! The first snowfall can happen in mid-November, and snow is not uncommon in April. Temperatures vary from -5° C (in November) to -20° C in February, but houses are well heated. During the winter, you will need a coat, overshoes, a hat, a scarf, and gloves. If winter clothing is not available in your country, your partners will help you get what you need when you arrive. Spring, summer or fall temperatures are milder, but can still be cold, especially if you are used to warmer climates. Bring sweaters or light jackets for these seasons. If you have any questions about the climate in Canada or appropriate clothing for the weather, do not hesitate to ask your local contact in the Canadian municipality. Please note that the cost of warm clothing is not reimbursable by FCM.

**Seeing a doctor in Canada**

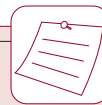
Local health facilities and hospitals are available in every community except those that are very remote. In general, they can all provide excellent care or referral to specialized services. Ask your Canadian counterpart for information on the nearest facility. Use a taxi to get to the treatment facility (the cost of the taxi ride is reimbursable as described in Section 6).

If you need to see a physician, remember that all medical information is confidential. The doctor cannot give any information to anyone without your consent.

All municipalities, large or small, have drugstores (pharmacists or chemists). In large cities, certain drugstores stay open 24 hours a day. You will not need a doctor's prescription for common medication for headache, stomach ache, colds and flu. Drugstores carry many varieties of these non-prescription drugs, so ask the pharmacist for advice. You will, however, need a prescription for antibiotics, birth control pills, etc. Note that your health insurance will cover the cost of prescription drugs but not the cost of non-prescription drugs. The cost of non-prescription drugs is not reimbursable by FCM.

**Emergencies while in Canada**

Ask your local counterpart for information on the nearest facilities and how to get in touch with emergency services such as an ambulance. Many communities in Canada have a central number (9-1-1) for all emergency services. Others require that you dial a seven-digit phone number. Make a note of the emergency number in your Health: Personal Info



## Reminder

**Tips on What to Show the Canadian Doctor**

- Present your membership certificate (wallet card) along with proof of your identity. The certificate number must be included with all claims and enquiries.
- When possible, also present the information guide (which contains a description of the CIDA Health Care Plan benefits and limits) before receiving services. Some services may not be covered.
- You should also carry claim forms with you. Costs cannot be reimbursed if the claim form is not filled out completely. Ask the health care provider to send invoices directly to the insurance company.

Booklet for quick reference. The CIDA Health Care Plan will cover ambulance costs for severe illness, injuries or other medical emergencies.

As soon as medical emergency measures have been taken, contact the Federation of Canadian Municipalities. An FCM staff member will be able to give you advice on what to do next.

## 6.5 Challenges of Cross-Cultural Work

The success of a municipal partnership can be greatly affected by the ability of participants to work in a cross-cultural context. This section presents some suggestions on working with other cultures while on a mission, and working with an interpreter. These suggestions were developed with previous participants from municipal partnerships. Please take the time to see if the suggestions can be applied to your partnership.

### What are the tips for working with other cultures?

#### Before a mission

Before going on a mission, or while planning a mission:

- Learn at least a few phrases in the language of your municipal partner;
- Learn as much as possible about your partner's culture, religious beliefs and social values;
- Learn as much as you can about the partner's country, history and municipal governance structure;
- Find out as much as you can about your guests before they arrive. You may be able to find out more about participants from other members of your municipality who have already participated in exchanges;
- Try to anticipate any problem areas;
- Prepare a social agenda that has a variety of activities but also leaves time free for rest periods;
- Brief the municipal staff that will be in contact with the visitors about how to make them feel welcome. Remember that the visitors will be in a strange place; anything that makes their stay easier will enhance the productivity of the exchange.

#### When the mission arrives

When the mission arrives, you can make the participants more comfortable if you keep the following in mind:

- Be at the airport to receive your guests – make them feel welcome. If possible, greet them in the security area;

- Plan to keep the first day free of any events that might be too draining – provide time to relax and get over jet lag;
- Find out about any special dietary needs as soon as possible, and try to accommodate them;
- Have the work program and social program ready to discuss;
- Have basic information available about the city and the places that your guests will be visiting. Include a street map and map of the area.

#### During the mission

The mission will be more effective if you can do the following:

- Try to talk about and understand each other's expectations;
- Try to stay calm if you're feeling frustrated or discouraged. Talk it over with your colleagues and counterparts;
- Attend a municipal council meeting during the mission. Seeing and understanding the political process is important for participants. Their presence may also help to increase political support from the local council;
- Include your guests in some special municipal events;
- Ensure that you make contact with your guests at least every two days. When participants are involved in a course or other type of activity, daily contact may be more difficult. But regular contact will help prevent feelings of isolation and loneliness;
- Make a point of sitting down to talk with your partners in the middle of a mission to make sure that planned activities are satisfactory and running smoothly. Make adjustments if necessary;
- Avoid overloading the itinerary with too many different types of technical activities. It is better to concentrate on the exchange or the development of one specific skill or activity. Make sure that participants have enough time to absorb new material;
- At social occasions such as receptions or dinners, include people who can converse in both languages so that more people can communicate through them with each other. Even if the translation is not perfect, communication among the guests will help to strengthen the partnership;
- Be prepared for participants to be tired by the second week of the exchange. A weekend break may be required;
- Avoid overloading the social agenda. Take time, or encourage your guests to take time, to rest, walk around and meet people informally;
- Arrange simple social occasions involving family life and staff from all levels. Participants may find it difficult to adapt to a new environment and different work pace. Be open to personal visits with your guests;



## Reminder

### Cultural Tips

- Be open to understanding your partner's values and customs, especially as they relate to family and work.
- Remember that there are bound to be differences between partners. Recognizing and discussing those differences can develop both tolerance and understanding.
- Be aware of your reactions to individual and cultural differences. Sometimes, you will experience pleasure, sometimes stress and frustration.
- It is not possible to understand everything in a short time: it is just as important for partners to develop confidence in one another and to accept their differences.
- Remember that you can adapt to a new culture without understanding it completely. Learning an appropriate greeting, as well as trying new foods or activities will help you and your hosts feel more comfortable.

- Find out any special interest or activities (such as a religious service) that might make the partner's stay more interesting or more familiar.

### Before the mission returns home

Before mission participants leave the host country to return home, you can bring closure to the mission by doing the following:

- Conduct a joint evaluation with your partners. Discuss the activities that took place and evaluate their success in meeting the goals you set together. Did anything happen that you didn't expect? Analyze why and what effect it will have on future activities;
- If you don't think you have met your goals, discuss what should be done to accomplish them. Identify the follow-up required by each participant after the exchange;
- List the potential short-term and long-term results that are likely to result from the exchange;
- Consider whether there are other informal linkages that could be established, such as correspondence, exchanges between students, etc.;

- Try to establish what your guests enjoyed most and profited from the least during the exchange. Ask for suggestions about how to improve the next exchange;
- If possible, give your guests some small souvenirs, such as an official municipal gift or photos of hosts and guests together.

### After the mission

When mission participants have returned home, keeping in contact can make sure the momentum of the mission is maintained for your partnership. Let the participants know about the effects of their work.

### What are the tips for working with Interpreters?

When you and your partners do not share a common language, an interpreter may be required during working meetings and training sessions. Interpreters play an important role in facilitating communications between partners. The effectiveness of the interpreter in bridging language and cultural differences can be a key element in the success of a mission.

This section provides some tips on how to find interpreters and work effectively with them. FCM will cover the costs of interpretation when necessary. Consult your FCM Officer if you need interpreters and to establish acceptable rates.

### Choosing a good interpreter

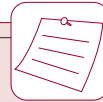
In choosing an interpreter, find out if the interpreter has:

- A comprehensive understanding of the languages to be interpreted, including the professional and technical terms related to the area of cooperation of your project;
- Knowledge of the social, political and economic situations of the countries involved, including government policies, financial statistics, electoral practices, tax collection, deployment of civil servants and the role of community groups;
- Knowledge of the municipal context, structure and responsibilities;
- Willingness to work in a variety of settings, from formal gatherings such as council meetings or consultations with political leaders, to visits to job sites such as municipal garages, childcare centres, wastewater facilities or computer training schools;
- Willingness to provide feedback to participants and to accept suggestions from them.

## Working effectively with an interpreter

When working with an interpreter, keep in mind the following tips:

- Allow time for preparation before each session. Provide background information well in advance and answer any questions your interpreter may have. Before each session, set aside some time to go over the main points you will make or the issues that you think will be discussed. Be sure that your interpreter understands not only the technical information but also the key points in your approach;
- Make sure that your interpreter's only responsibility is to facilitate communications. Interpreters should not be expected to take notes or provide other types of assistance during a meeting or working session;
- Focus on the main ideas. If you have a number of points to discuss, make notes that you can share with your interpreter. If you are speaking spontaneously in a meeting, try to organize your thoughts and give verbal clues such as "I have three questions," or "Let me present some background first. Then, I will go on to the main issues.";
- Pause after each complete thought or sentence. Your interpreter may have difficulty retaining the details of a long and complex sentence. It is better to break up the ideas, even if it means that you take a slightly longer time to present your thoughts. If you must refer to statistics or large numbers, allow time for the interpreter to check the figures before translation. Make sure that the interpreter feels free to ask for more details if he or she does not understand what you said;
- Avoid humour that plays on words. Humour may make a presentation livelier, but what is funny is often culturally determined. Jokes rarely translate well, especially if they are based on word play, idioms or specific social references. Humour that is based on common situations may be effective, but check out your jokes with the interpreter to make sure that they will not offend or confuse your counterparts;
- Listen to your audience. If you are presenting a speech, face your audience and watch their facial expressions and body language for clues about how they are reacting. Be aware of your interpreter's reactions as well: if your interpreter looks puzzled, provide clarification before he or she begins to translate;
- During meetings, remember that your counterparts are looking to you for clues about how well they are communicating. Pay close attention and ask for clarification if you do not understand anything that is said. Think about your facial expressions and body language. Read up on intercultural



### Reminder

#### Tips for Working with an Interpreter

- Allow time for preparation before each session
- Make sure that your interpreter's only responsibility is to facilitate communications
- Focus on the main ideas
- Pause after each complete thought or sentence
- Avoid humour that plays on words
- Listen to your audience
- During meetings, remember that your counterparts are looking to you for clues
- Provide rest times for your interpreter
- Get regular feedback from your interpreter
- Provide feedback to your interpreter

communications before you travel overseas so that you will know what is considered positive in that culture and what may offend your hosts;

- Provide rest times for your interpreters. In formal or intensive working sessions, interpreters may need a break every hour. While the pace of interaction may be slower on the job, you must still build in rest times (perhaps over meals or breaks). If a bilingual speaker is available, arrange for that person to fill in as needed;
- Get regular feedback from your interpreter. Arrange a short debriefing after each session and at regular intervals in a longer exchange. Ask your interpreter for feedback and suggestions to improve communications. The interpreter may be able to identify areas where your counterparts still seem uncertain or issues that were not completely resolved. Ask whether the way you present your ideas makes translation easy or difficult. You may not be aware of speaking habits that are posing problems for your interpreter;
- Provide feedback to your interpreter. It is important for your interpreter to know whether he/she is providing an effective service for you. It is even more important for him/her to know if you are not satisfied with any aspect of his or her work. Without feedback, your interpreter cannot change his/her approach. If you are feeling frustrated with the interpreter, it may affect your working relationship with your counterparts. They may think you are frustrated with the content of the meeting rather than with the interpretation.



# 7 Tool Kit

# Tool 1

Terms of Reference  
for Municipal  
Partnership Local  
Coordinators

## Terms of Reference for Municipal Partnership Local Coordinators

Each partner in a Municipal Partnership is invited to appoint a Local Coordinator to manage the design, implementation and evaluation of the Partnership Project. The Canadian Local Coordinator and the Overseas Local Coordinator are the key contacts in each partner municipality. They are responsible for ensuring sustained support for the project and responding to the needs of both municipal partners.

### Responsibilities

The Local Coordinator is responsible for coordinating the technical and communications requirements and financial management of the Municipal Partnership. In particular, the Local Coordinator will:

- Ensure good communication between the two partner municipalities or cities and with FCM;
- Keep municipal council and staff informed about partnership activities;
- Participate in the design of the Partnership Project;
- Mobilize and coordinate resources within the municipality for the implementation of the Partnership Project;
- Coordinate arrangements for sending delegations to the partner municipality or hosting delegations from the partner municipality;
- Coordinate briefing and debriefing sessions for participants in missions;
- Monitor the results of the project and progress towards expected results;
- Manage project funds;
- Report to FCM on partnership activities, results achieved and funds disbursed;
- Participate in training seminars organized by FCM;
- Ensure that women are informed and consulted in both municipalities and that gender equality issues are included in project activities.

### Requirements

The Local Coordinator is someone who is:

- Familiar with municipal government;
- A good time manager who can commit adequate time to the project;
- A communicator;
- Action and result oriented;
- Well-positioned within the municipality to mobilize required resources;
- Culturally sensitive and committed to gender equality.

# Tool 2

## FCM's Approach to Municipal Development

TOOL 2 – FCM STAFF TO INSERT FLYER ON FCM APPROACH TO MUNICIPAL DEVELOPMENT

# Tool 3

## Mission Plan Template

## Mission Plan

Type of Mission:  Assessment  Project Definition  Technical Exchange

Name of Partner Municipalities: \_\_\_\_\_

Name of Project: \_\_\_\_\_

Location: \_\_\_\_\_

Date: \_\_\_\_\_

### 1. BACKGROUND

Provide a summary of your Municipal Partnership and Partnership Project. This can be taken from your project proposal.

Provide a summary of the milestones that have been achieved since the start of the project. Include an update on what has happened since the last mission. The Overseas Coordinator will provide most of this information.

### 2. OBJECTIVES OF THE MISSION

State the purpose of the mission: Why are you undertaking this mission?

List the objectives of the mission: What do you want to achieve during the mission?

### 3. EXPECTED RESULTS OF THE MISSION

What do you expect to achieve by the end of the mission? Describe how you will know that you have achieved your expected results.

### 4. MISSION ACTIVITIES

Describe the activities that will take place during the mission. For each activity, identify the participants and state the purpose (e.g., training workshop with financial staff to introduce risk control concepts). The program of activities can be taken from the Project Proposal but should be developed in greater detail. If the activities vary from the proposal, explain why and how.

Attach a detailed program for the mission as an appendix.

### 5. MISSION TEAM COMPOSITION

List the mission participants. Include their titles, their roles and responsibilities in the mission (e.g., Jan Low, Manager of Human Resources, Your Municipality - Mission Leader - will lead and coordinate all aspects of the mission). Make every effort to include female elected officials, staff or community leaders in all missions.

### 6. KEY CONTACTS

List the following key contacts, including their titles and coordinates (such as telephone number, fax and email) and accommodation details:

- Local Coordinator and/or Mission Leader;
- Local Coordinator in host (receiving) municipality;
- FCM contact;
- Provide the name and coordinates of the hotel where the mission team will stay.

## 7. BUDGET

Attach the budget for the mission and for any support activities that will occur during the mission. The mission budget can be obtained from the Budget in your Project Proposal. Make modifications if necessary.

## 8. PREPARATION

Describe any advance preparation that should be undertaken by the Canadian and overseas partner prior to the mission. Good pre-arrival preparation can help participants get the most out of their time overseas.

Examples:

- Canadian partner: contact community health organization to prepare kit on communication strategies
- Overseas partner: prepare documents on structure of municipal health department



# Tool 4

Examples of  
Assessment  
Mission Plans

TOOL 4 – FCM STAFF TO INSERT EXAMPLES OF ASSESSMENT MISSION PLANS'

# Tool 5

## Capacity Assessment Guide

## Capacity Assessment Guide

This Guide will help you and your partner assess municipal capacity in your area of cooperation and crosscutting considerations such as gender equality and environment. The Guide consists of a simple list of topics that you may find useful to address during the Assessment Mission. Using this as a starting point, you may want to add elements or questions specific to your project.

### A. MUNICIPAL ORGANIZATION

#### 1. Strategic Leadership

Evaluate the strategic leadership of the municipality in your area of cooperation. Look for:

- An articulated vision developed by the municipality in the area of cooperation (e.g., in waste management, etc.);
- Use of a strategic plan that clarifies priorities, sets goals, and deals with change;
- Systems in place to ensure dialogue between the council and the administration;
- Involvement of stakeholders (including employees) in strategic planning, including the involvement of women in leadership roles;
- Systems in place to increase the number of women serving as both elected officials and senior managers.

#### 2. Corporate Management

Evaluate the corporate management of the municipality in your area of cooperation. Look for:

- Strengths and weaknesses in planning, financial management, human resources, equipment, communications, policy and regulations related to your area of cooperation;
- Assessments and plans for developing management capacities;
- Work structure, management systems and processes that facilitate performance and continuous improvement (e.g., responsibility centres, delegation of work);
- Appropriate skills and knowledge among staff;
- Involvement of women in management roles.

#### 3. Service Delivery

Evaluate the municipality's service delivery to citizens in your area of cooperation. Look for:

- Adequate and appropriate infrastructure;
- Systems to respond to client requests (communication, research, consultation);
- Adequate assessments and plans for developing service delivery capacities;
- Equity in service delivery (for example, do women, minority groups and the poor receive services?);
- Appropriate skills and knowledge among staff to deliver services effectively.

### B. COMMUNITY RELATIONSHIP

Evaluate the links between the municipal government and the community in your area of cooperation. Look for:

- Community participation in planning, research and decision-making (committees, forums, open meetings);
- Involvement of and participation by women, minority groups and the poor in municipal planning, research and decision-making;
- The role and influence of civil society organizations, including the role that women's organizations can play in policy development and council decisions that will affect them;
- Systems and plans for monitoring and promoting participatory processes;
- Appropriate skills and knowledge among staff in participatory processes (facilitation, mediation, conflict resolution, communication, gender analysis).

### C. THE EXTERNAL ENVIRONMENT

Evaluate the external factors that affect the ability of the municipality to respond to the needs of its citizens in your area of cooperation. Look for:

- Laws, regulations, and policies adopted by the government, ministries, provinces or regions that can hinder the ability/capacity of the municipality to respond to the need of the citizens in your area of cooperation;
- Current collaboration and support of municipal associations to your partner municipality;
- Other external factors affecting the municipality.

# Tool 6

## Mission Report Template

## Mission Report

Type of Mission:  Assessment  Technical Exchange

Name of Partner Municipalities: \_\_\_\_\_

Name of Project: \_\_\_\_\_

Location: \_\_\_\_\_

Date: \_\_\_\_\_

### 1. INTRODUCTION

Summarize the purpose, objectives and expected results of the mission you undertook.

Describe briefly the activities that took place during the mission.

### 2. RESULTS FROM PREVIOUS ACTIVITIES

Describe any progress achieved in your project (since the last mission) that has not yet been reported.

### 3. MISSION RESULTS

Describe to what extent you have achieved the objectives and expected results of the mission.

If you achieved the results you expected, explain how you were able to do so. If you did not achieve results fully, explain why.

Include results in cross-cutting theme areas, such as gender equality.

Indicate overall lessons learned (if any) during the mission.

### 4. MISSION FOLLOW-UP

Describe any immediate follow-up activities to complete the objectives of this mission. Include activities in both the Canadian and the overseas municipalities, and describe their purpose and who will be responsible.

### 5. PROJECTED ACTIVITIES

Describe other activities (e.g., Partnership Support Activities, preparations for the next Technical Exchange Mission, actions to promote gender equality) that your partnership will undertake in the next six months.

Attach any materials such as photographs or newspaper articles that depict the progress of your Partnership Project.

# Tool 7

## Expense Claim Form



## Expense Claim Form

### Reminders

Your Expense Claim is due within 30 days of return/completion of each mission or activity of the project.

Please note that only original supporting documentation (invoices, receipts) is accepted for the reimbursement of expenses. It is a CIDA requirement that all original supporting documentation be kept by FCM for audit purposes.

The foreign exchange rate used to convert foreign expenses incurred into Canadian dollars should be based on the actual currency exchange receipts. Please note that only one exchange rate for each country should be used in an Expense Claim. If currency is exchanged more than once while travelling in a given country, the average rate from the exchange receipts should be used.

Please attach your currency exchange receipts to your Expense Claim. If no currency exchange receipts are provided, FCM will use the average exchange rate, as per the Bank of Canada, for the period of travel.

Foreign exchange rates can be found on the Bank of Canada's Internet site: [www.bankofcanada.ca/en/exchange-look.htm](http://www.bankofcanada.ca/en/exchange-look.htm)

For those foreign currencies that are not listed on the Bank of Canada web site, please refer to Oanda.com at the following Internet site: <http://www.oanda.com/convert/classic>

Your municipality should claim its GST rebate on the travel and project expenses incurred and submit the NET expenditures to FCM for reimbursement. FCM will only reimburse expenses up to the net amount incurred by the municipality (i.e., the gross expense less the municipality's GST rebate).

Your In-kind Contribution Report must be submitted along with your Expense Claim. No payments of Expense Claims will be made without the receipt of your completed in-kind contribution form.

Meal / incidental per diem rates for the period of travel are reimbursed in accordance with the Treasury Board Travel Directive, Appendix C (Canadian/US rates) and Appendix D (International rates). The Directive can be found on the Internet at: [www.tbs-sct.gc.ca/hr-rh/gtla-vgcl/index\\_e.asp](http://www.tbs-sct.gc.ca/hr-rh/gtla-vgcl/index_e.asp).

### Completing the Expense Claim

#### 1. Complete the General Information:

- Name of your municipality;
- Address;
- Project reference number (4-digit project number – please discuss with your FCM Officer if you do not have this number).

#### 2. Complete the Travel Information:

- Location / destination;
- Start date and end date of the mission / activity.

#### 3. Enter expenses under the appropriate expense category:

(i.e., transportation, meals/incidentals, accommodation, other travel, project expenses) and separate expenses incurred in Canada from those incurred outside of Canada.

Each expense should detail:

- Date: enter the date the expense was incurred (DD/MM/YY);
- Receipt #: reference the receipts that you have attached to the Expense Claim. Please note that no receipts are needed for meal/incidental per diems. However, you must provide details as to how the per diems were calculated (i.e., individuals, dates, meals claimed);
- Description: enter a description of the expense;
- Incurred in Canada: this column represents all the expenses incurred in Canada. Enter the net expense incurred (i.e., the gross expense less the municipality's GST rebate);
- Incurred outside Canada: this column represents all the expenses incurred outside Canada. Enter the type of foreign currency, the foreign amount incurred, and the foreign exchange rate. The Canadian dollar amount will calculate automatically.

#### 4. Total Advances:

Enter the total advances received from FCM.

#### 5. Amount Payable to Municipal Partner / (Amount due to FCM):

This amount will calculate automatically. Amounts due will be paid directly to the municipality. Amounts payable to FCM can be made by cheque issued to the "Federation of Canadian Municipalities" once the claim amount is verified and finalized by our Finance Department.

#### 6. Fill in the name of your municipality's local coordinator:

He/she must sign and date the Expense Claim.

### Sending the Expense Claim

Your Expense Claim, along with all supporting documentation, should be sent to FCM and to the attention of your Officer. Also, kindly send an electronic copy of your completed Expense Claim form to your Officer. This electronic copy will facilitate and expedite the processing of your Expense Claim.

FCM STAFF TO INSERT CURRENT VERSION OF THE EXPENSE CLAIM FORM

# Tool 8

Examples of  
Project Definition  
Mission Plans

TOOL 8 – FCM STAFF TO INSERT CURRENT EXAMPLES OF PROJECT DEFINITION MISSION PLANS

# Tool 9

Example of a  
Letter of Reference

## Example of a Letter of Reference

September 10, 2003

Mayor Mary Bortega  
City of Fernando  
Fernando  
The Philippines

Dear Mayor Bortega:

**Re: 2nd Technical Exchange Mission from Fernando to Pleasantville – Oct 28 to Nov 14, 2003**

I am pleased to send you this letter to officially invite a delegation from the City of Fernando to travel to Pleasantville at the end of October 2003 to take part in the 2nd Technical Exchange Mission of our Partnership Project.

It is our understanding that the delegation will be composed of the following individuals:

- Mr. Gil Valero, Director, Planning Department of the City of Fernando
- Mr. Manuel Borja, City Planner, Planning Department of the City of Fernando

The delegation will stay 18 days in Canada, arriving on October 28th, 2003 and returning to the Philippines on November 14th, 2003. The City of Pleasantville, through the FCM Partnership Program, will cover all direct costs for three delegates from Fernando (round trip economy class airfare, accommodation, meals, incidentals) and the cost of Canadian visas. I invite you to apply for Canadian visas at your earliest opportunity.

The FCM Partnership Program is a human resources development program that links Canadian municipalities and cities with local governments in developing countries. The program provides opportunities for municipal political leaders, administrators, technicians and professionals to increase their capacity to deal with common municipal development issues by sharing experience, working together and applying knowledge in practical situations. The Government of Canada through the Canadian International Development Agency (CIDA) funds FCM's Partnership Program.

Yours truly,



John Taylor  
Local Coordinator and City Manager  
City of Pleasantville  
Canada

Copy: Mr. Sebastien Hamel, FCM (Canada); Mrs. Penny Morton, Canadian Embassy (Philippines)

# Tool 10

Examples of  
Letters of Intent

## Examples of Letters of Intent

### City of Pleasantville / City of Fernando Partnership

#### Letter of Intent

The City of Pleasantville and the City of Fernando are willing to constitute a partnership under the Municipal Partnership Program of the Federation of Canadian Municipalities. In November 2002, a delegation from Pleasantville went to Fernando to undertake an assessment mission to study potential areas of cooperation. In January 2003, a delegation from the city of Fernando visited Pleasantville to undertake the project definition mission and expressed interest in having initial technical exchanges in the area of planning, including heritage conservation. The visit was a very productive one and many positive relationships were developed.

The City of Pleasantville and the City of Fernando hereby agree to form a municipal partnership and develop a Project Proposal in the area of planning, subject to approval and ratification of their respective councils.

For the City of Pleasantville:



Mr. Robert Short  
Deputy Mayor  
January 14th, 2001

For the City of Fernando:



Ms. Mary Bortega  
Mayor  
January 14th, 2001

### City of Cong Mai / Town of Red Cedar Partnership

#### Letter of Intent

The City of Cong Mai and the Town of Red Cedar initiated cooperation activities in 2000 under the Partnerships Program of the Federation of Canadian Municipalities. In 2000 and early 2001, initial exchanges were organized to assess potential joint activities in the primary areas of economic development, information technology and waste management. In February 2001, during a mission of Cong Mai's delegates to Red Cedar, the two partners developed a draft Project Proposal that identifies activities in the area of information technology for the period of April 2001 to March 2003.

The City of Cong Mai and the Town of Red Cedar hereby agree to implement the activities proposed in the attached Project Proposal document subject to the approval of their respective Councils.

For the Town of Red Cedar:



Mr. Peter Harrell  
Councillor  
February 14th, 2001

For the City of Cong Mai:



Mr. Pakorn Buranuprakorn  
Mayor  
February 14th, 2001



# Tool 11

Template for a  
Project Proposal

## Template for a Project Proposal

Title of Project: \_\_\_\_\_

Project Proposal by: Canadian municipality and Overseas Municipality, Country

Project start date (month, year)

Project end date (month, year)

### 1 PREAMBLE (maximum one page)

Describe the context for this proposal, including how the project fits into FCM's International Partnership Program, a brief history of the establishment of the partnership, and the results from the Assessment Mission and the Project Definition Mission.

Include one paragraph that summarizes the project: goals, objectives, and duration.

### 2 RATIONALE (maximum two pages)

Explain why the project should be carried out.

Describe the importance of the area of cooperation that the project will address; explain the current situation (or prevailing conditions) in the overseas partner municipality; describe the priorities for capacity building and which of these priorities the project will address.

### 3 PROJECT DESCRIPTION (maximum three pages)

#### 3.1 Goal

Describe in one sentence how the project will improve the quality of life in the community.

#### 3.2 Objectives

Describe precisely what the project aims to accomplish in terms of building capacity that will lead to improving the quality of life.

#### 3.3 Expected Results

Describe the results you expect from implementation of the project:

##### Short-term results

Describe what each of the project activities will deliver (e.g., tax collection staff trained in information technology, participatory process for decision-making designed and implemented).

##### Final project results

Describe the outcome expected at the end of the project, when you have built municipal capacity in the area of cooperation (e.g., efficient tax collection, women and minority groups included in decision-making).

##### Impact

Describe the expected impact or what the project will achieve in the long run to improve the quality of life for the community (e.g., better health, sanitation and environment because of good solid waste management).

##### Indicators

Provide a list of indicators for each of the expected results (i.e., how will you know whether or not you have achieved these results?)

### 3.4 Cross-Cutting Considerations

Describe how the cross-cutting themes play out in the area of cooperation. Describe how the project will address the crosscutting themes. (Note: Gender equality should be a cross-cutting theme for all projects.)

### 3.5 Risk Factors

Describe the assumptions you have made that are key to the success of the project (e.g., political support from councils, availability of financial resources for related infrastructure development, availability of human resources for project implementation, timely exchange of information).

Describe what you will do to ensure that these assumptions will hold.

## 4 WORK PLAN (maximum 3 pages)

### 4.1. Program of Activities

Provide the schedule and details for the activities in your project (e.g., Technical Exchange Missions, Partnership Support Activities). Include:

- The purpose of each activity (e.g., Technical Exchange Mission to Canada to observe consultation process on garbage collection);
- Who needs to be involved / Why? (Staff, volunteers, institutional partners, etc.);
- Other resources required (facilities, equipment, meeting halls, etc.);
- A clear time frame for all the activities.

Refer to FCM's Institutional Capacity Development Framework for the four stages through which municipalities will progress in developing capacity.

### 4.2. Monitoring and Evaluation

Describe how you will monitor the progress of your project and include a reporting schedule. (Note: a report is submitted after each Technical Exchange Mission or Partnership Support Activity.)

Describe how you will maintain communication with your partner municipality between missions.

Describe briefly how you will evaluate your project at the end.

### 4.3. Project Management Team

List the core people, in addition to the Canadian and Overseas Coordinators, who will be involved in the implementation of the project. Very briefly describe the role of each member of the team.

## 5 BUDGET (maximum two pages)

Attach a budget for your project, including an estimate of in-kind contributions. Use the FCM Budget Template for Partnership Projects in **Tool 14**. The budget should be presented by fiscal year (April to March).

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Signature

Mayor of Canadian Municipality

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Signature

Mayor of Overseas Municipality

# Tool 12

## Examples of Project Proposals

Tool 12 – FCM STAFF TO INSERT EXAMPLES OF CURRENT PROJECT PROPOSALS'

# Tool 13

Guidelines for  
Integrating Gender  
Equality Issues in  
Partnership Projects

## Guidelines for Integrating Gender Equality Issues in Partnership Projects

Sustainable development is possible only with the full participation of both women and men in all aspects of economic, political and social activity. However, women and men do not always enjoy equal access to or control over basic services. Women typically face greater barriers that exclude them from serving as elected officials or senior managers, or participating in consultative processes. As a result, the design and delivery of municipal services do not always respond to women's needs, as users of these services and women do not always have equitable access to these services.

The ultimate goal of Partnership Projects is to improve the quality of life of all citizens, men and women. Municipal government and all municipal staff need to develop sensitivity to the needs and priorities of different groups of women and men, taking into account factors such as income, class, as well as ethnic and political diversity among women and men. Municipal structures and services need to be designed so that all citizens, including poor women and men, have equal access to decision making and services.

These guidelines provide a checklist of actions that you can take to promote gender equality when planning, implementing and evaluating your Partnership Project.

- Assign the responsibility for supporting gender-related activities to one member of the project team.  
This is necessary even if the project is not designed specifically around women's issues, as no area of municipal responsibility is ever gender neutral.
- Involve women at all stages of a project, from planning to evaluation.  
This will increase the chances that the project's benefits to the community actually reach women. Include women at all stages, even when they are not present in the highest positions (mayors or senior administrative officers), to determine whether and how the areas of cooperation will affect them, and what effect the project's activities have had on them. Do not assume that elected officials necessarily represent women's best interests. Experience has often shown otherwise.
- Undertake a gender analysis during project inception.  
Both partners should undertake together an analysis of gender-related roles, interests and constraints for each area of cooperation. The level of this analysis will be in keeping with the scope and size of the project, and will depend on the availability of appropriate baseline and gender-disaggregated data. Consult with local women's municipal associations, female councillors and community leaders during this process. The analysis will allow partners to discuss gender equality principles and the status of women in their respective environments.
- Use indicators to measure and report on gender equality.
- Disaggregate all data you collect by gender.
- Identify specific actions that will be undertaken to promote gender equality.
- Include female elected officials, staff or community leaders as participants in training activities and all missions.  
It takes proactive and sustained efforts to include women as equal participants when there are cultural, traditional and economic barriers to equal participation for women.
- Prepare selected women adequately for their missions and for training activities and give visibility to their achievements.  
Women often come to the municipal scene less prepared than men because of traditionally-defined gender roles and responsibilities. It is important to give women adequate preparation to enable them to fulfill new roles successfully in the municipal world.
- Make sure there is exchange of information on issues of common interest between female staff and elected officials of both municipalities involved in the partnership.
- Share and discuss the Canadian experience with Commissions for Women and the integration of gender in municipal agendas.  
With your partner, assess the role that women's groups can play in policy development and council decisions that will affect them, and consider how to assist them in playing their role. Identify specific and concrete actions to increase the number of women serving as both elected officials and senior managers, such as promoting the leadership of women within the municipal administration or civil society, enhancing the status of these women and supporting their visibility.

# Tool 14

## Budget Template for Partnership Projects



## Budget Template for Partnership Projects

| ACTIVITIES   | CONTRIBUTIONS        |                              |                              |       |
|--|----------------------|------------------------------|------------------------------|-------|
|  | FCM/CIDA<br>(CAN \$) | Canadian Partner<br>(CAN \$) | Overseas Partner<br>(CAN \$) | Total |
| <b>Technical Exchange (where, date)</b>  |                      |                              |                              |       |
| <b>TRANSPORTATION:</b>   |                      |                              |                              |       |
| Airtfares  |                      |                              |                              |       |
| Airport tax  |                      |                              |                              |       |
| Local transportation (transfer to airport, local transport)                                    |                      |                              |                              |       |
| <b>MEAL / INCIDENTALS ALLOWANCE (days x \$ x pers.)</b>  |                      |                              |                              |       |
| <b>ACCOMMODATION (nights x \$ x pers.)</b>   |                      |                              |                              |       |
| <b>OTHER TRAVEL EXPENSES</b>   |                      |                              |                              |       |
| Health insurance and vaccines  |                      |                              |                              |       |
| Miscellaneous (visas, airport tax, currency exchange commissions)                              |                      |                              |                              |       |
| <b>PROJECT COSTS (business communication, translation, printing)</b>                           |                      |                              |                              |       |
| <b>IN-KIND CONTRIBUTION</b>  |                      |                              |                              |       |
| Time contribution of partners (days x individuals)   |                      |                              |                              |       |
| Other contribution (telephone services, office space, facilities, tools, books, publications)  |                      |                              |                              |       |
| <b>Subtotal:</b>   |                      |                              |                              |       |
| <b>Technical Exchange (where, date)</b>  |                      |                              |                              |       |
| <b>TRANSPORTATION:</b>   |                      |                              |                              |       |
| Airtfares  |                      |                              |                              |       |
| Airport tax  |                      |                              |                              |       |
| Local transportation (transfer to airport, local transport)                                    |                      |                              |                              |       |
| <b>MEAL / INCIDENTALS ALLOWANCE (days x \$ x pers.)</b>  |                      |                              |                              |       |
| <b>ACCOMMODATION (nights x \$ x pers.)</b>   |                      |                              |                              |       |
| <b>OTHER TRAVEL EXPENSES</b>   |                      |                              |                              |       |
| Health insurance and vaccines  |                      |                              |                              |       |
| Miscellaneous (visas, airport tax, currency exchange commissions)                              |                      |                              |                              |       |
| <b>PROJECT COSTS (business communication, translation, printing)</b>                           |                      |                              |                              |       |
| <b>IN-KIND CONTRIBUTION</b>  |                      |                              |                              |       |
| Time contribution of partners (days x individuals)   |                      |                              |                              |       |
| Other contribution (telephone services, office space, facilities, tools, books, publications)  |                      |                              |                              |       |
| <b>Subtotal:</b>   |                      |                              |                              |       |
| <b>Partnership Support Activities</b>  |                      |                              |                              |       |
| <b>DESCRIPTION OF ACTIVITY 1:</b>  |                      |                              |                              |       |
| <b>DESCRIPTION OF ACTIVITY 2:</b>  |                      |                              |                              |       |
| <b>IN-KIND CONTRIBUTION</b>  |                      |                              |                              |       |
| Time contribution of partners (days x individuals)   |                      |                              |                              |       |
| Other contributions (telephone services, office space, facilities, tools, books, publications) |                      |                              |                              |       |
| <b>Subtotal:</b>   |                      |                              |                              |       |
| <b>SUBTOTAL</b>  |                      |                              |                              |       |

continued on reverse

| ACTIVITIES   | CONTRIBUTIONS        |                              |                              |       |
|--|----------------------|------------------------------|------------------------------|-------|
|  | FCM/GIDA<br>(CAN \$) | Canadian Partner<br>(CAN \$) | Overseas Partner<br>(CAN \$) | Total |
| <b>Evaluation Mission (where, date)</b>  |                      |                              |                              |       |
| <b>TRANSPORTATION:</b>   |                      |                              |                              |       |
| Airtfares  |                      |                              |                              |       |
| Airport tax  |                      |                              |                              |       |
| Local transportation (transfer to airport, local transport)                                    |                      |                              |                              |       |
| <b>MEAL / INCIDENTALS ALLOWANCE (days x \$ x pers.)</b>  |                      |                              |                              |       |
| <b>ACCOMMODATION (nights x \$ x pers.)</b>   |                      |                              |                              |       |
| <b>OTHER TRAVEL EXPENSES</b>   |                      |                              |                              |       |
| Health insurance and vaccines  |                      |                              |                              |       |
| Miscellaneous (visas, airport tax, currency exchange commissions)                              |                      |                              |                              |       |
| <b>PROJECT COSTS (business communication, translation, printing)</b>                           |                      |                              |                              |       |
| <b>IN-KIND CONTRIBUTION</b>  |                      |                              |                              |       |
| Time contribution of partners (days x individuals)   |                      |                              |                              |       |
| Other contributions (telephone services, office space, facilities, tools, books, publications) |                      |                              |                              |       |
| <b>Subtotal:</b>   |                      |                              |                              |       |
| <b>TOTAL YEAR 1 (April to March)</b>   |                      |                              |                              |       |
| <b>TOTAL YEAR 2 (April to March)</b>   |                      |                              |                              |       |
| <b>GRAND TOTAL</b>   |                      |                              |                              |       |

# Tool 15

## Evaluation Mission Plan Template

## Evaluation Mission Plan

Name of Partner Municipalities: \_\_\_\_\_

Name of Project: \_\_\_\_\_

Location: \_\_\_\_\_

Dates: \_\_\_\_\_

### 1. BACKGROUND

Provide a summary of your Municipal Partnership and the Partnership Project. Provide a brief update on the milestones that have been achieved since the start of the project.

### 2. ORIGINAL PROJECT PURPOSE AND EXPECTED RESULTS

Describe the original goal, objectives and expected results of your project as found in your Project Proposal. This is the basic information against which the evaluation will take place.

### 3. OBJECTIVES OF THE MISSION

State the purpose of the mission: why are you undertaking this mission?

List the objectives of the mission: what do you want to achieve during the mission?

(These will mostly be evaluation objectives, but you may have some other objectives as well, such as preliminary discussions for a dissemination activity. One aspect you may want to evaluate thoroughly for replication purposes is the extent to which the actions you undertook to promote gender equality in decision making and the delivery of services were successful.)

### 4. DATA COLLECTION PLAN

Planning the evaluation mission is key to success. List the indicators for the expected results of your project and describe your methodology – how you will collect data on these indicators (e.g., questionnaires, surveys, checklists, interviews, documentation review, observation, focus groups, case studies). The list of indicators may be taken from your project proposal. Add any new indicators that were developed during your project. Remember to disaggregate data for gender.

Provide details as to who will be responsible for collecting the data and from whom, and when the data will be collected. Be sure to consult women in data collection activities (focus groups, surveys, interviews, etc.) and to include women as data collectors.

You may present this section in the form of a table (see below), and attach an agenda if necessary.

| Expected Results                         | Indicators | Methods To Collect Data | Who Collects Data From Whom | When Will Data Be Collected |
|--|------------|-------------------------|-----------------------------|-----------------------------|
| Expected short-term result 1             |            |                         |                             |                             |
| Expected short-term result 2             |            |                         |                             |                             |
| Expected short-term result 3             |            |                         |                             |                             |
| Expected final or end-of-project results |            |                         |                             |                             |
| Expected impact (long-term results)      |            |                         |                             |                             |
| Etc...                                   |            |                         |                             |                             |

## 5. MISSION TEAM COMPOSITION

List participants in the mission. Include their titles and their roles and responsibilities in the mission.

## 6. KEY CONTACTS AND ACCOMMODATION

List the following key contacts, including their titles and contact details, such as telephone number, fax and email:

- Local Coordinator and/or Mission Leader;
- Local Coordinator in host (receiving) municipality;
- FCM contact;
- Provide the name and coordinates of the hotel where the mission team will stay.

## 7. BUDGET

Attach the budget for the mission. (The mission budget can be obtained from the Project Budget in your Project Proposal. Make modifications if necessary.)

## 8. PREPARATIONS

What preparations (initial reports, initial data collection, organization of workshops to discuss results, etc.) need to be undertaken prior to the mission by both the Canadian and overseas partner municipalities?

# Tool 16

## Project Final Report Template

## Project Final Report

Name of Project: \_\_\_\_\_

Name of Partner Municipalities: \_\_\_\_\_

Location: \_\_\_\_\_

Date: \_\_\_\_\_

### 1. BACKGROUND (1 page)

Provide a summary of your Municipal Partnership and the Partnership Project.

Provide a brief update on the milestones that have been achieved during the project.

Describe the purpose of this report. Who will read this report and how will the report help them?

### 2. PROJECT PURPOSE AND EXPECTED RESULTS (1 page)

Describe the goal, objectives and expected results of your project (this information can be taken from your project proposal).

### 3. EVALUATION METHODOLOGY (1 page)

Describe your data collection plan during your Evaluation Mission. This information can be taken from your Evaluation Mission Plan. Be sure to note any changes from the original plan and to disaggregate all data by gender.

Describe how you analyzed the data collected.

Describe any limitations of the evaluation you conducted: are there any cautions about the findings/conclusions and how to use the findings/conclusions?

### 4. FINDINGS AND CONCLUSIONS (4 - 6 pages)

Describe the extent to which the project achieved its goal and objectives: to what extent has municipal capacity been developed in the area of cooperation? To what extent has this improved the life of citizens, both men and women, in the municipality?

Describe the factors that helped or hindered the project in achieving its objectives, including opportunities for or barriers to equal participation for women.

Describe any unexpected results from the project. Include an assessment of the project impact in Canada even if you did not formally undertake an evaluation in Canada.

Describe the extent to which the project achieved results with respect to the crosscutting themes such as gender equality.

### 5. LESSONS LEARNED AND RECOMMENDATIONS (1 – 2 pages)

Describe the lessons learned from your project. These can refer to any aspect of your partnership or project, from administration to technical matters, or partner relations to gender equality issues.

Provide recommendations for your partnership, as well as for other projects and partnerships:

- Describe how the knowledge or processes developed in your project can be shared with other municipalities;
- Be sure to describe the strengths and weaknesses of your approach regarding gender equality, as this is still an innovative practice in municipal development and lessons learned in promoting the leadership of women within the municipal administration or civil society (such as enhancing the status of these women and supporting their visibility) must be shared.

## 6. APPENDICES

Depending on the evaluation conducted and other material developed throughout the project, these can include:

- Evaluation schedule and list of people interviewed, instruments used to collect data/information;
- Any related literature;
- Newspapers articles, photographs, etc.



# Tool 17

Examples of Project  
Final Reports

Tool 17 – FCM STAFF TO INSERT EXAMPLES OF PROJECT FINAL REPORTS

# Tool 18

## Guidelines for Case Studies

## Guidelines For Writing Case Studies on Innovative Municipal Cooperation Activities

The international programs of the Federation of Canadian Municipalities (FCM) allow Canadian municipalities to share their experience with their counterparts in developing countries. In many cases, cooperation activities funded by FCM lead to the creation in developing countries of innovative management practices that have strong exemplary value. FCM has launched a series of case studies to document these experiences. The case studies will be used to:

- Inform the various stakeholders (municipalities, development organizations, research institutes, the public) involved in municipal issues;
- Publicize innovative approaches to knowledge transfer and experience sharing in municipal management; and
- Illustrate the keys to success in municipal international cooperation and to share the lessons learned.

The following are guidelines for preparing a case study.

### 1. Length of Document

The length of the document should be 2250 words or less (3-5 pages).

### 2. Title

The title should reflect the major theme of the activity to be presented, the geographic location and the level of intervention (local, district or national).

For municipal partnerships, it is possible to present only one sector of cooperation; e.g., Support for the Management and Automation of Public Archives in Accra, Ghana.

### 3. Summary (300 words)

This section should give a general overview of the project/initiative.

Describe the situation before activities commenced and the project objectives.

Explain the strategy and methodology used and the stakeholders involved in the process.

Note the major accomplishments and point out the impact on the community, including the impact on women, minority groups and the poor.

### 4. Text

#### Introduction (100 words)

Present FCM and its international programs, while focusing on the program that funded the project.

#### Issue (100 words)

Describe the situation before starting the project. Point out the main problems, the consequences and the attempts to deal with them.

Present the priorities of the project (e.g., satisfying basic human needs, involving women in the development process, supporting good governance).

**Approach (600 words)**

This section should have a catchy title, which includes the keywords of the approach.

Explain the process for setting goals and determining the strategy and methodology (how, by whom).

Describe the resources (human, material, financial), as well as the tools and techniques used by the project.

Explain how activities were implemented.

Describe the involvement of other institutions, organizations and the community, including women, minority groups and the poor.

**Results and Analysis (700 words)**

This section should have a catchy title that evokes the main accomplishments of the project.

Describe to what extent the objectives were met. Outline the indicators used to evaluate the results.

Describe the results that the project achieved in certain key areas, such as the relations between the municipal government and the community, changes in social, economic and environmental policies and strategies, the improvement of institutional capacity, change in the decision-making process, change in the use and distribution of human, technical and financial resources, change in public attitude and behaviour, gender equality and equitable access for all groups.

Insert some participants' comments on the impact of the project.

Identify specific opportunities and limitations, as well as the solutions that were applied.

Emphasize sustainability factors, such as:

- Cultural factors: respect and consideration for attitudes, behaviours and traditions;
- Social and economic factors: gender equality, inclusion and social equality;
- Environmental factors: reduction in the use of non-renewable resources (such as air, water, soil and energy) through change in methods of production or consumption
- Financial factors: use of available resources, terms for repayment of loans

Explain the importance and significance of the project/activities in the context of the country. Examples of this include support for a consultation process in a municipality/country with traditionally little cooperation between the elected representatives and the population, or improvement to the recovery of taxes with the use of automated data relative to developed lands.

**Lessons Learned and Replicability of the Experience (300 words)**

Describe the lessons learned during the initiative and their influence on preliminary planning. Were these lessons used to change policies /strategies /plans?

Describe the elements that give this activity its exemplary value.

Briefly describe how the activity can be replicated or adapted by other organisations or municipalities (list the major steps to follow and the type of organisations to involve).

**5. Use of Photos**

Use photos (at least 2) to illustrate the process and the accomplishments. For this, you can use photos from training sessions, photos that illustrate community participation, equipment provided, or renewed infrastructures, etc. Photos can be included in either the Approach or the Results section.

# Tool 19

## Examples of Case Studies

Tool 19 – FCM STAFF TO INSERT EXAMPLES OF CASE STUDIES