



الاتحاد العربي للنقابات
ARAB TRADE UNION CONFEDERATION

ATUC

Project management policies

Project Management Policy



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I- Planning

It is a central ambition of the strategic planning of ATUC to build the strength of Arab employees and trade unions.

Three central objectives:

- A.** Development of the ATUC and Arab Trade Unions
- B.** Realization of labor rights
- C.** Sustainable jobs, income security, and social protection for employees

II- Operational Planning

In order to achieve each of the central objectives, a series of plans shall be developed annually.

Each plan shall:

- Focus on one or more central objectives,
- have a direct organizing foundation and/or
- frame or facilitate the organization of opportunities and/or
- support the conditions necessary for organization.

This planning process shall be carried out by a single task force. Each task force shall be led by one department of the ATUC; the other members shall come from other

departments, regional organizations, and local offices of ATUC and ITUC as needed.

The mission of each task force shall be to set objectives (projected goals) and outcomes (expected results) for each action plan.

III- Project Planning

Each department shall appoint a project leader for each action plan. The project leader shall develop the details of the project in cooperation with colleagues in the department, with the financial officers responsible for the projects, with the regional organization(s), the local office(s) of ATUC , and its affiliated organization(s).

This additional project planning shall take into account the eight principles and guidelines on development effectiveness.

1) Democratic ownership:

Unions define democratic ownership as respecting and responding to the goals and priorities of their trade union partners, with the aim of building the partners' self-reliance within the context of the mission of the international trade union movement.

2) Independence:

Partner trade union organizations make their own decisions and priorities and respect each other's strategic choices, without political interference.

3) Partnership:

Partnership aspires to create an equal relationship, based on mutual respect, trust and understanding, where diversity and difference are recognized and respected.

4) Transparency:

Unions define transparency as high standards of openness and access to the information necessary to establish fair relations between union partners.

5) Accountability:

Partner trade union organizations are subject to a system of mutual accountability at the political, operational and financial levels, which should be supported by appropriate common assessment tools and learning processes to gain greater effectiveness in future initiatives.

6) Consistency:

Consistency for trade union organizations means to achieve maximum coherence in their approach across various development cooperation initiatives, ensuring that everything aligns with and contributes to, rather than contradicts, the overall objectives.

7) Inclusiveness and equality:

The trade union movement believes that inclusiveness and equality mean that all employees have the right to equal treatment in employment and occupation.

8) Sustainability:

Trade unions understand sustainability as ensuring the long-term viability of the results achieved through development projects, as well as the strengthening and capacity-building of the cooperating trade union organizations themselves. Project details shall be developed in accordance with the principles of Logical Framework Approach.

- Development goal -

The development goal is a high-level goal that will contribute to the intervention in the project. It defines what the project should contribute to at the community level in the long term - that is, the lasting impact that should remain even after the project has concluded.

- Project goal -

The project goal refers to the impacts that the project is expected to have on the targeted beneficiaries. It is the determination of what will be achieved at the end of the project. These results should be tangible benefits that reflect how beneficiaries use the project outcomes. Only one project goal is determined in order to prevent the project intervention from becoming too complex and difficult to manage.

- Expected outcomes-

Expected outcomes are the work outputs that the project should be able to ensure. They describe the actual results that the project is expected to achieve after the completion of project activities. There

can be many expected outcomes for a single project goal. It may be necessary to check baselines or starting points.

- Activities. -

One or more activities should be defined for each expected outcome.

- Assumptions -

They are external factors for which the project intervention is not responsible, although they largely affect the achievement of the development of goals and outcomes.

- Indicators. -

This is the data that allows to check the progress and achievements of the project. It can be quantitative (30 per cent of new leaders are women) or qualitative (labour legislation reform).

-Sources of verification.-

They indicate where (or how) indicator information can be found.

- Inputs are required -

Resources needed to implement planned project activities: human resources, administrative capacity, and financial means.

-Budget.-

Detailed budget is required. Donor guidance should be taken into account. Explain how the expenses are covered: the

contribution of the Arab Confederation of Private Trade Unions, the Solidarity Fund, the funding of different donors. Clearly indicate the currency used. The currency should be specific and indicate each unit name expenditure (month, day, page, ticket, people), number of units, unit price and total. Cooperation with the Finance Department (finance officers' projects) is required.

Finally, a realistic action plan and timeline shall be developed.

Control

A. At the strategic level

This shall be done by the management team of ATUC, the General Council and Congress.

At each of its meetings, the management team shall also monitor the overall status of funding possibilities for various donor organizations, upcoming reporting deadlines, application deadlines and general developments in development cooperation policies.

B. At the operational level

The monitoring of the action plans of ATUC shall be carried out three times a year, during

- The planning week in early February;
- The planning weeks at the beginning of July;
- The planning week in early November.

The task force shall perform this control.

C. At the project management level

- At least every two months, each department shall monitor the status of all projects. The project officer shall describe the progress of the activities, the status of the expected outcomes, and the financial follow-up (expenses, expected funding, funds required). Indicators are an important component of the control process.

- At least every two weeks - depending on the complexity of the project - the project officer shall organize follow-up meetings and / or contacts with all relevant project actors:

- Finance officer's projects;
- Head of the task force;
- Regional organization or local office of ATUC
- Affiliated organization(s)
- Donor organization

- At least every year - perhaps repeatedly depending on the provisions of the contract (mid-term reports) - the designated project officer shall prepare the reports as required by the donor organization (s). Particular attention shall be paid to projects where local or regional partners need to submit timely financial and narrative reports for review by the Finance Department of ATUC. Each donor shall have specific reporting requirements, forms, and deadlines.

- Examples of contents to be controlled:

- Progress according to indicators
 - Type and number of activities implemented
 - Relevant target groups, number of participants, gender (men and women)
 - Training methodologies used
 - Materials used and / or produced
 - Comments on the differences between planned and actual activities
 - Comparison of objectives and actual outcomes
 - What was not achieved and why not?
 - The lessons learned
 - Proposed amendments for the next reporting period
- Valuation

A. At the strategic level

This shall be done by the Executive Secretary of ATUC, the General Council and Congress. At each of the meetings held, the Executive Secretary of ATUC shall also assess the overall situation of receiving funding from various donor organizations and reporting requirements.

B. At the project level

At the end of each project and at least once a year, the project officer shall conduct an evaluation of each project.

In this process, all relevant actors in the project shall be involved:

- Finance officer's projects;
- Regional organization or local office of ATUC
- Affiliated organization(s)
- Donor organization

At least once a year, each department shall conduct an evaluation for each project, based on the project officer's evaluation report.

Detailed guidance for the implementation of activities

Preparation prior to the activity / task

- The Finance Department must be notified of the planned activity and project, and a detailed budget with cost estimates must be provided thereto. Also, the person responsible for organizing the activity shall be informed.
- When calculating daily expenses, please do not hesitate to check the daily expenses policy of ATUC
- Travel authorization shall be obtained prior to travel (please clearly indicate the project / budget for the activity / task).
- Where a bank transfer to a local partner is necessary for the activity, please submit a transfer request/payment voucher to the Finance Department at least three weeks before the start of the activity.

- Ensure there is a written agreement/ acceptance from local partners to follow the terms of the donation, reporting requirements, invoices, receipts for submission and deadlines to be respected.

- Where a cash advance is required (personal cash advance or activity cash advance), please apply three weeks in advance.

- Organizing the activity

Before the activities, check the conditions and requirements imposed by the donors

- Make a list of participants signed by all participants in the activity / meeting. Please make a list for each day of the activity and mark the details of the participants in advance in the list.

- Make a detailed agenda of the activity.

- When planning to get air tickets for participants, please request the most direct and economical way between the place of residence and the place of activity.

During activity:

- The list of participants shall be signed every day.

- Please keep all original documents (invoices, receipts, vouchers, etc.) for each expense. Copies shall not be accepted.

- When paying for daily expenses and other travel costs, please make a receipt for each participant and add all originals

- Require boarding passes from each participant as a condition for paying daily expenses.
- Request a copy of the bank statement showing the bank transfer from ATUC to the local partner (if applicable) and the amount received in local currency.
- If you change funds to local currency or from local currency to EUR or USD, please keep the original receipts from the bank or exchange office, indicating the exchange rate and the amount in both currencies.

It is highly recommended to collect all original invoices, receipts and other financial documents before returning from your activity / task. If this is not possible, insist that all documents be sent to ATUC within two weeks after the completion of the activity. At the end of the task, change your local currency funds to EUR or USD. Keep the original exchange documents as described above and add them to your report /travel claim.

After the activity:

1) Be sure to separate your personal costs from the costs of the activity / task. To do this, you'll need to report in two different ways:

- Travel claim (personal costs)
- Financial report of the completed activity

2) Bring all remaining EUR or USD cash after your activity / task to the Finance Officer who will give you a receipt. Add the receipt to your travel claim or financial report.

3) Submit your personal travel claim and give it to Finance Department.

- Do not provide expenses that are supposed to be covered by daily expenses (meals, incidentals, etc.)

- Do not provide expenses to participants in your personal travel claim. These expenses shall be reported in the financial report.

- Do not provide expenses that represent project costs.

- Attach original proofs of your travel expenses claims.

- Select any lunch and / or dinner served to you

- Indicate the personal cash advance you received (if any)

- No travel claim will be accepted if the corresponding travel authorization is missing

4) Make a financial report on the activity in three parts:

A. Income

- Specify the amount in local currency transferred by ATUC to the local partner. Provide a copy of the bank statement as evidence

- Determine the amount of cash advance you received for the activity / task

- Identify each amount you received in cash during the activity / task. Provide a document for each income and mention:

- Date
- Who you received the money from
- Purpose of transaction

- Select the donor (s) funding the activity/task

B. Exchange transactions to and from the local currency

- Submit original proof of each exchange transaction
- Select the date and amount of the two currencies

C. Expenses

- Place a serial number on all original documents attached to your report in chronological order, if possible
- Make a list in Excel showing all expenses and the corresponding number of the original document. Also point out the following items:

- Date
- A clear description of the expenses and their purpose
- Amount paid and currency. Do not convert to EUR or USD
- If you paid with your credit card, please add a credit card statement showing the amount and exchange rate.

5) Give the Finance Department a complete file containing the following:

- Financial report with all attachments and supporting document

- Signed list of participants (+ boarding passes)

- The original activity report, signed by the author of the report, shall be conducted for each activity

B. Complete your own files related to the activity with the following documents:

- Narrative report as per donor requirements
- Documentation used during the activity: PowerPoint materials, training materials, etc.
- Documents prepared during the activity: decision(s), strategy and planning documents, etc.
- Assessment
- Pictures
- Press articles

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