



TAMKEEN

West Bank and Gaza Civil Society and Democracy
Strengthening Project

Work Plan 2004



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ACRONYMS

APS	Annual Program Statement
ATC	Anti-Terrorism Certificate
CLIN	Contract Line Item Number
CSO	Civil Society Organization
CSS	Civil Society Specialist
D&G	Democracy and Governance
FA	Finance and Administration Sub-team
FOG	Fixed-Obligation Grant
IQC	Indefinite Quantity Contract
IR	Intermediate Result
IT	Information Technology
NGO	Non-Governmental Organization
PCBS	Palestinian Central Bureau of Statistics
PCIT	Programming, Communication, and Information Technology Sub-team
PLC	Palestinian Legislative Council
PMP	Performance Monitoring Plan
PONAT	Participatory Organizational Needs Assessment Tool
UNFPA	United Nations Population Fund
UNICEF	United Nations Children's Fund
USAID	United States Agency for International Development

Executive Summary

This work plan for the USAID-funded Civil Society and Democracy Strengthening project (Tamkeen) covers the period from January 1 to December 31, 2004. Tamkeen's primary objective is to help Palestinian civil society organizations (CSOs) increase their voice in public discourse and preserve the critical "space" occupied by Palestinian CSOs, placing them at the heart of the communications nexus between citizens and their public representatives at the local and national levels. By the end of 2003, Tamkeen had awarded a total of 193 grants worth approximately \$10 million to achieve this objective. Our work plan for 2004 builds on this success, expanding support to underserved groups like youths and children, rural and marginalized populations, smaller CSOs, and CSOs not previously served by the project.

In 2004, we will place greater and more deliberate emphasis on strengthening the capacity of partner CSOs using a holistic and integrated approach. This approach builds on our experiences from last year, during which we viewed all of our activities as capacity-building efforts designed to help targeted CSOs strengthen their position and preserve their space in public discourse. As such, Tamkeen's grants program—with the practical, hands-on capacity building it entails—will be organically linked to other capacity building and technical assistance initiatives.

Under the grants program, Tamkeen will award 14 new simplified grants focusing on democracy and governance (D&G) and 26 new simplified grants for the delivery of services with a D&G component. We will also renew 19 successful grants and expand our fixed-obligation grant (FOG) program to benefit smaller, more marginalized CSOs. In total, we plan to award approximately \$6.3 million in grant funds during the year, fully obligating the funds allocated by USAID for grants in Tamkeen's contract.

Tamkeen will focus capacity building and technical assistance initiatives on its partners during the year. Our subteam of civil society specialists (CSSs) will continue to improve the capacity of partner CSOs to design and implement grant activities, and our information technology (IT) subteam will help increase partners' access to computer equipment and other technology. In parallel, the finance and administration (FA) subteam will continue to conduct pre-award capacity assessments and audits of grantee-CSOs, and use these findings to design and implement capacity building initiatives that create more transparent and financially compliant organizations.

Tamkeen also plans a range of specialized assistance to build the capacity of CSOs active in the D&G and reform fields. This includes training programs in advocacy skills, media relations, and election preparations and oversight. It also includes a joint effort with leading Palestinian training providers to develop an advanced, standards-based program to increase the quality of training design and delivery, as well as to create a permanent body to champion training excellence in Palestine. Throughout our work, we will maintain a flexible technical approach, allowing us to respond quickly to the emerging needs of our partner CSOs and changing conditions on the ground.

In the coming year, our communications subteam will implement capacity building initiatives to help targeted CSOs better communicate their goals, objectives, and achievements to key audiences. It will also continue to develop and maintain a range of mechanisms that increase the transparency, understanding, and appreciation of Tamkeen's efforts among important stakeholders and the general public.

To better evaluate our success in reaching USAID-mandated objectives, we will continue to implement our results monitoring program in the coming year. This includes finishing data collection and analysis for all grants as they are completed using our Performance Monitoring Plan (PMP), as well as two more extended studies of the impact of our grants program. These studies, which will be specified in partnership with USAID, may include an examination of the contribution of grants focused on youths and children and/or grants in the water and environment sector.

Finally, Tamkeen will continue to improve its management structure and ability to operate under adverse conditions. This includes full implementation of the administrative procedures and personnel and management changes initiated in 2003, strengthened controls and adherence to contract requirements, and retreats to improve coordination among team members and allow them to better support partner CSOs.

SECTION I

Supporting the Role of Palestinian CSOs in Public Discourse

From the start of the project through the end of 2003, Tamkeen awarded 193 grants worth a total value of approximately \$10 million. Another 16 grants worth about \$1.6 are expected to be ready for award in early 2004, bringing the total value of grants close to \$11.6 million. This is close to Tamkeen's original target—a substantial achievement considering the challenges faced by the project, particularly the fallout from the USAID-mandated Anti-Terrorism Certificate (ATC) and the volatile political situation, including the ongoing Intifada, incursions, and closures.

All of Tamkeen's grants are helping Palestinian civil society organizations (CSOs) expand their role in public discourse, either directly (through townhall meetings, policy analysis, and youth leadership programs) or indirectly (by combining basic service delivery in health, education, and/or the environment with democratic process activities).

Other major successes include establishment of the Palestinian Training Best Practices Committee by six universities in the West Bank and Gaza and three other leading training providers. The committee will oversee design and implementation of internationally accepted training standards, which will be applied and tailored to the Palestinian context. In addition, we completed two impact assessment studies that confirmed Tamkeen is helping maintain the space occupied by Palestinian CSOs and strengthening their role in the decision-making process.

We will build upon these successes and lessons learned in 2004. This section presents the overall vision that will drive our activities in the coming year—a vision that remains unchanged since the beginning of the project and that was revalidated during meetings with a wide cross-section of CSOs, political leaders, USAID officials, and donor representatives. We then discuss the overall approach to realizing this vision and the contextual factors that affect our work. Subsequent sections of this document describe specific tasks we plan to undertake to achieve concrete outcomes and measurable results by the end of 2004.

A. Tamkeen's Vision

Tamkeen's vision is to ensure “increased participation of Palestinian civil society organizations (CSOs) in public discourse... and to contribute to preserving the critical ‘space’ occupied by Palestinian CSOs, placing them at the heart of the communication nexus between citizens and their public representatives at the local and national levels.”

Accordingly, Tamkeen has supported the efforts of Palestinian CSOs to implement activities that contribute to USAID's Strategic Objective 3 (“more responsive and accountable governance”), its intermediate result (IR) 3.1 (“increased participation of CSOs in public decision making and government oversight”), and the following sub-IRs:

- Increased capacity of CSOs to participate in public discourse
- CSOs effectively aggregate and articulate citizen issues
- CSOs effectively disseminate information to citizens on public issues

Tamkeen's vision continues to be relevant, meaningful, and valid. At the same time, maintaining maximum flexibility in planning, design, management, and implementation of Tamkeen activities continues to be essential for the project to effectively respond to overall uncertainty on the ground and the changing needs of Palestinian CSOs.

A1. Vision Focused: Support Democracy and Governance Activities

To ensure responsiveness to changing circumstances, Tamkeen's senior management held a series of meetings with experts and leaders from the CSO community, the Palestinian Legislative Council (PLC), the Palestinian Authority, and the international donor community. Our team continued to participate in various conferences, seminars, and workshops to remain up to date on relevant activities and to better understand the context surrounding the project.

In addition, Tamkeen successfully organized seven consultative meetings in 2003, held in the north, center, and south regions of the West Bank and Gaza. These meetings were attended by 100 CSO leaders in Gaza and the West Bank.

Through these meetings and in preparation for the work planning process, our team attempted to address two interrelated questions:

- Is there enough interest and justification for supporting democratic process activities under the prevailing circumstances?
- What can Tamkeen do to ensure that its work continues to be relevant and responsive to the practical needs of the Palestinian people while supporting the role of CSOs in public discourse?

This sub-section addresses the first question, while the second is discussed in the sub-section that follows.

That Tamkeen should continue to support democratic process activities was a clear and consistent message communicated during all the meetings. Because Tamkeen is a major source of support for democracy and governance (D&G) activities and continues to be the largest project supporting the role of CSOs in public decision making and government oversight, the prevailing view is that the project must maintain its D&G focus and avoid moving into other areas, such as emergency response and/or pure service delivery.

This opinion was echoed by most of Tamkeen's CSO partners during consultative meetings held last year. These partners agreed that D&G efforts must continue even under the most adverse and challenging conditions. Setting the foundation for a democratic system in Palestine, they argued, is an iterative and long-term process, and CSOs must continue their advocacy efforts so they are ready and able to affect change at the appropriate time.

Most of the people consulted noted that the democracy-related activities initiated by Palestinians in the past few years should neither be undermined for the sake of responding to emergency needs, nor postponed until political conditions are more favorable, as some have

suggested. The vast majority stressed the importance of working in parallel tracks by addressing people's immediate needs while maintaining concerted efforts to promote reform in all sectors (government/private/NGO) so as not to lose the momentum they have worked so hard to build. They also stressed the importance of having a "home-grown" and organic reform process that is independent from Israeli and foreign agendas.

The importance of reform as a Palestinian domestic priority was consistently echoed during various public events, seminars, and conferences organized by Palestinian governmental and non-governmental organizations throughout the year. This view was notably put forth by the Task Force on Palestinian Reform, comprising representatives from Canada, Japan, the World Bank, and the Quartet (United States, European Union, Russia, and the United Nations) in its December 11, 2003, meeting.

A2. Flexible and Real: Integrate Services With D&G Activities

Because it is difficult to promote reform and/or democracy without addressing the practical needs of the Palestinian people, CSOs agreed that reform and democracy-focused activities must go hand-in-hand with service delivery.

This argument was strongly validated by the two impact assessment studies commissioned by Tamkeen and undertaken by two independent experts. As Souad Dajani noted in her report, "Service delivery organizations are able to fill a niche by combining information on democracy and governance directly with their service delivery. CSSs [civil society specialists], CSOs, and beneficiaries all report greater receptivity to such information when it is linked to tangible benefits. Farmers, women, and others seeking particular services were adamant in saying they would not come listen to 'talk'."

Therefore, the question for Tamkeen was not whether it should support grants that integrate D&G with service delivery, but which types of activities are most likely to have the strongest impact? Dr. Dajani's study partly responded to this question, emphasizing that activities targeting youths will produce greater results than those focused on other sectors and/or target populations.

The approach combining D&G with service delivery has enabled CSOs to provide essential services to their constituents while addressing larger policy and strategic issues. For the first time, it has allowed traditional "charitable organizations" and service delivery CSOs to engage in policy-level and advocacy issues of interest to their constituents, which would not have been possible without Tamkeen's encouragement, coaching, and support. For example, El Lod Charitable Society, which has traditionally provided basic services to poor, marginalized, and disabled residents in the Nablus area, has started organizing citizens and advocating their interests to local government officials and PLC members. Outcomes of this sort are among Tamkeen's main contributions to not only "preserving," but also expanding the role of CSOs in public discourse.

B. Working Environment: Success Against Adversity

Tamkeen continues to operate in increasingly difficult social and economic conditions and a complex political environment. The project has adapted to these challenges through decentralization, information technology (IT) solutions, and stronger relationships with the CSO community and other stakeholders. Nonetheless, the political and socioeconomic

situation has a significant and direct impact on our plans for next year. As explained last year, four factors in particular continue to be of central concern in developing our work plans, as discussed below.

B1. Social and Economic Hardship

Social and economic conditions in the West Bank and Gaza have continued to deteriorate at an alarming rate since the outbreak of the Intifada in late September 2000. This has included reoccupation of most of the West Bank, internal closures separating towns from each other, substantive destruction of physical infrastructure, and the deinstitutionalization resulting from regular Israeli army incursions and attacks on Palestinian Authority structures and institutions. The growing unemployment rate and malnutrition among Palestinian children are other examples of the real impact of these measures.

With its physical and institutional capabilities severely undermined, the Palestinian Authority has not been able to adequately respond to the needs of the Palestinian population. As a result, Palestinian CSOs have continued to respond to the direct, practical, and immediate impact of the Intifada, while trying to maintain a focus on long-term developmental and/or strategic matters, including engaging the Palestinian Authority in a meaningful and constructive dialogue, providing critical analysis of the current situation and people's opinions on various issues, and trying to exercise an oversight function over the various structures and levels of government.

As the standard of living of most Palestinians is unlikely to change over the next year, the need for continued service delivery will remain strong. CSOs and the Palestinian Authority will have to better coordinate their efforts to provide services more adequately and fairly to the neediest segments of the population.

B2. Increasing Political Sensitivity

The Palestinian Intifada entered its fourth year in September, with no end in sight. Efforts to renew the Palestinian-Israeli peace process, including the "roadmap for peace" and most recently the "Geneva Accord," have yet to produce any tangible results. In addition, security conditions have continued to worsen by the day. Israel's destruction of most security offices and continued incursions and attacks against civilian and security establishments have created a security vacuum, particularly in the West Bank—a vacuum that is being filled by various militias and even criminals in some cases. The situation is slightly better in Gaza, where the security apparatus is relatively more intact.

In addition, the new USAID-mandated Anti-Terrorism Certificate (ATC) has made it more difficult for Palestinian CSOs to receive financial and other types of support from the U.S. government and/or its contractors. As we described in greater detail in our quarterly progress reports, most CSOs, including many that rely a great deal on U.S. government funding, are reluctant to sign the ATC. Indeed, many CSO leaders told Tamkeen's senior management that signing the ATC would make them a potential target for harassment by the Palestinian Authority as Palestinian law forbids the conditional receipt of donor funds. This is especially true for CSOs working on D&G issues.

Nevertheless, as of the writing of this work plan, enough Palestinian CSOs appeared willing to sign the ATC for Tamkeen to maintain its grants program, albeit with the loss of several

organizations that are leading reform and democratization efforts in the West Bank and Gaza. As discussed in Section II of this work plan and in our quarterly progress reports, this situation could change at any minute as the political fallout of the ATC is still being felt, particularly with regard to the Palestinian Authority's position, but also with respect to the decisions of countless CSOs on whether to sign the certificate.

Furthermore, anti-American sentiment in the Arab world is on the rise in the aftermath of the U.S.-led war against Iraq and continued occupation of that country. This has placed the project and its entire team under tighter scrutiny, making our work more challenging over the next year.

On a more positive note, the past year saw the creation of the post of Palestinian prime minister, which has been filled by two prominent leaders to date, namely Mahmoud Abbas (Abu Mazen) and Ahmad Qurai (Abu Ala). It is worth noting that the post was established due to sustained external pressure exerted by the United States and Israel to further isolate and marginalize Palestinian Authority President Yasser Arafat, who is also head of Fatah and the Palestine Liberation Organization. Abbas's term in office was short, and it is not clear how long Qurai's government will last. Regardless, the creation of the post of prime minister has been viewed as a step toward greater reform within the Palestinian Authority as it contributed to solidifying the separation of powers. This opinion was strongly supported by the Task Force on Palestinian Reform in its December meeting.

B3. Logistical Constraints

Traveling within the West Bank and Gaza, and between these two non-contiguous geographic entities, continues to be extremely difficult. This has affected the ability of Tamkeen staff and consultants to perform their work in a timely manner, and reduced our partners' access to services provided through the project's main offices in Ramallah and Gaza City.

The Israeli authorities frequently and suddenly seal the West Bank and Gaza, making it difficult for Tamkeen staff, consultants, and/or partners to travel to and from the outside world for training or other project-related matters. For example, the division of the Gaza Strip into three areas in October forced us to cancel an elections workshop in Khan Younis and prevented our two impact assessment consultants from visiting southern Gaza to conduct direct research, forcing them to rely exclusively on telephone interviews. Closures also made it impossible for the two researchers to visit projects in Jenin in the northern West Bank.

As discussed in Section V, "Overall Management," Tamkeen has taken steps to decentralize its operations, to the extent feasible, by establishing IT and administrative procedures designed to mitigate the negative impact of these external factors.

B4. Chronic Uncertainty

Because of the sudden and unexpected nature of changing circumstances in the Palestinian areas, planning has become a frustrating and tedious exercise. Valuable resources are being allocated to developing contingency plans and coming up with reasonable scenarios to cope with the chronic uncertainty that surrounds our work. As expected, the cost of doing business has increased to compensate for these risk factors.

Programmatically, Tamkeen continues to work with partner CSOs to develop program applications that take into account, to the extent possible, the various uncertainty factors and to help them be better prepared to cope with uncertainty. For example, CSOs are always asked to think, a priori, of various scenarios that could happen, and cognizant CSSs work with them to craft reasonable approaches to coping with these scenarios. This is a valuable capacity-building function that Tamkeen has continued to fill in extending assistance to partner CSOs.

In addition, and as described in Section II of this work plan, it is not clear how many CSOs will sign the ATC, nor how long it will take those willing to sign to develop a full grant application. This makes it imperative to develop appropriate assumptions for planning purposes, while maintaining a large degree of flexibility so we can quickly shift resources to respond to changing circumstances and new opportunities.

C. Operating Assumptions

In developing our 2004 work plan, we considered the various challenges facing the project and built upon our experience over the past three years. In light of these factors, we have made several key assumptions that affect Tamkeen's operational environment. Specifically, we assume that:

- The USAID Mission in the West Bank and Gaza will continue to function and fund its programs in general and the Tamkeen project in particular despite deteriorating conditions on the ground.
- The political, social, and economic conditions in the West Bank and Gaza will allow Tamkeen to implement its planned activities and to fulfill its contractual obligations according to a reasonable time schedule.
- Enough capable CSOs in the West Bank and Gaza will be interested in working with and receiving funding from Tamkeen to implement activities specified in the work plan.
- A reasonable number of Palestinian CSOs will be capable of and interested in working with and receiving funding from Tamkeen to implement democratic process activities.
- Palestinian CSOs will continue to be interested in engaging in capacity-building and/or technical assistance activities supported by Tamkeen.
- A number of CSO grantees are willing to be identified publicly with Tamkeen and/or USAID as part of communication initiatives.
- USAID will complete the vetting process for new CSOs in a timely manner.
- Tamkeen staff (Palestinians and expatriates) will be able to move within, between, and outside the West Bank and Gaza to fulfill their responsibilities.
- Expatriates providing technical assistance will be permitted and willing to come to the West Bank and Gaza to perform their work.

SECTION II

Alternative Mechanisms for Supporting the Role of CSOs in Public Discourse

A. Integrated Approach

Tamkeen will continue to strengthen the integrated technical approach it adopted under the 2003 work plan. All our grant-making, capacity-building, and technical assistance activities are focused on boosting the capacity of targeted CSOs to participate in public discourse and government oversight.

Drawing on the skills of all Tamkeen staff members, our integrated approach provides two immediate benefits:

- The wide range of capacity-building assistance we are able to offer to our partner CSOs will continue to expand in 2004. This is particularly important in light of Tamkeen's increased focus on nascent and less experienced organizations, as well as those serving marginalized areas or groups, including children and youths.
- Greater coordination among all Tamkeen sub-teams will ensure more effective use of available resources to the benefit of Palestinian CSOs.

The remainder of this section presents the grants program for 2004, followed by our grants management efforts and a discussion of our capacity-building and technical assistance initiatives.

B. Program Focus for Year 4

Our program focus for 2004 is informed by the results of seven consultative meetings held last year with more than 100 CSO leaders representing 77 CSOs; bilateral discussions with representatives from the PLC, donor agencies, USAID, and other influential institutions; Tamkeen's own internal discussions and experiences; and the findings of the two impact assessments conducted in the fall of 2003. These interactions and findings have made it clear that Tamkeen should increase its focus on the following:

- *Support activities involving youths and children.* Based on recent statistics, 66 percent of the Palestinian population is under the age of 24. Last year, Tamkeen decided to work with youths and children as an opportunity to invest in the future. Young people are typically more open to new ideas and more likely to actively participate in advocacy activities. The impact assessment conducted by Souad Dajani confirmed that the project's efforts were achieving intended results in this area. Dr. Dajani noted that regardless of the type of grant used, "the most significant impact appears to be on youth and children." In addition, the first Palestinian National Youth Survey, conducted jointly by UNICEF and UNFPA with the Palestinian Central Bureau of Statistics (PCBS, released in December 2003), found that "36.6 percent of young people generally participate in the decision-making process on issues concerning their lives within their respective families." Tamkeen will continue to use simplified grants,

fixed-obligation grants (FOGs), and youth-focused grants under the Annual Program Statement (APS) to support civic education and youth empowerment initiatives.

- *Support activities in rural and marginalized areas.* Approximately 61 percent of Palestinians currently live outside the major cities of the West Bank and Gaza. However, according to a 2001 report by the Economic Policy and Research Institute, only 29.3 percent of all Palestinian CSOs are located in rural areas. Traditionally, urban-based Palestinian and international organizations have provided services to rural populations, but closures, roadblocks, and curfews have made it increasingly difficult for these groups to serve outlying areas. Because current conditions have increased the needs of isolated communities, it has become especially critical to encourage rural-based CSOs to design and directly implement activities in those areas.

As the impact assessment study conducted by Elham Eid-Allredge shows, Tamkeen's grants to medium-sized, service delivery CSOs have yielded significant results, and both impact assessment studies show that locally based organizations (those serving their own limited communities) are often better able to establish the trust necessary to reach marginalized groups like women and the disabled, as well as to mobilize these groups in advocacy efforts. As a result of these findings, Tamkeen will continue to work with a selected list of CSOs in marginalized areas, primarily through simplified grants under the APS mechanism and, where warranted and possible, programmatic FOGs.

- *Renew a number of successful projects by current grantees.* Tamkeen has found that renewing successful grant-funded programs is an effective way to maximize results and resources. We therefore plan to award a limited number of renewals to grantees whose implementation of existing grants has proven successful.

C. Supporting the Role of CSOs Through Grant-Making and Related Management

Grants to CSOs draw upon a \$16-million "pass-through" fund (CLIN 2). Within the context of ADS and CFR 226 guidance, Tamkeen has three grant-making tiers: (i) FOGs, (ii) simplified grants, and (iii) defined-focus grants.

While all three Tamkeen grant tiers share some common characteristics and management requirements, each requires management skills unique to itself. For example, Tamkeen's simplified grants use a milestone-tranche reimbursement funding mechanism, FOGs use a fixed-price deliverable mechanism, and defined-focus grants use an advance-liquidation mechanism.

In considering which of these options the project should utilize, a simple comparative cost-benefit analysis based on the project's actual experience is needed. Tamkeen's justification, presented in last year's work plan, for not using the defined-focus grants remains true this year. Given the revision to our grants program, whereby the funding limit for simplified grants was raised to \$150,000 over a maximum of 18 months, there is not much the defined-focus grant mechanism could achieve that the simplified grant could not. Therefore, for both programmatic and management purposes, Tamkeen will continue to use only the simplified and FOG mechanisms for awarding grants.

C1. Status of Grant Awards

Since its mobilization, Tamkeen has awarded simplified grants in five sectors: democracy and governance, health, education, water and the environment, and economic development. Most of the awards have consisted of simplified grants under \$100,000 each, covering a period of less than one year, though larger grants were also awarded in 2003. As of the end of 2003, the average value of each simplified grant was \$81,803, compared to \$80,000 by the end of 2002, and \$76,400 by the end of 2001.

As illustrated in Exhibit II-1, as of December 31, 2003, Tamkeen awarded 117 simplified grants and 76 FOGs worth a total value of \$10 million out of the approximately \$16 million currently allocated for grant awards.

Exhibit II-1. Summary of Grants Awarded from the Project's Inception to the End of 2003

	Number & Value of Grants Awarded in Year 1	Number & Value of Grants Awarded in Year 2	Number & Value of Grants Awarded in Year 3	Total Number & Value of Grants Awarded
Simplified Grants	44 grants worth \$3,361,578	55 grants worth \$4,615,590	18 grants worth \$1,581,291	117 grants worth \$9,558,459
Fixed-Obligation Grants (FOGs)	21 grants worth \$62,051	36 grants worth \$314,483	19 grants worth \$119,017	76 grants worth \$495,551
Total	65 grants worth \$3,423,629	91 grants worth \$4,930,073	37 grants worth \$1,700,308	193 grants worth \$10,054,010

Out of the 117 simplified grants awarded, 76 grants totaling more than \$5.8 million have been successfully completed, while the rest will be completed by the end of next year. It is important to note that of the 18 simplified grants awarded in Year 3, 12 were renewals, 2 were converted from the defined-focus grants solicitation issued at the end of Year 1, 1 was carried through from applications to the project's first D&G solicitation issued in July 2002, 3 were awarded in response to the second D&G solicitation issued in November 2002, and none were awarded in response to solicitations issued in the second and third quarters of Year 3. The total decline in grants awarded in Year 3 can be attributed to two factors: the introduction of the ATC and Tamkeen's conscious decision, as of last year's work plan, to target nascent, marginalized CSOs. These factors are discussed later in this section.

C2. Target Grant Awards for Year 4

To achieve its grant-related programmatic objectives for Year 4, Tamkeen will seek to:

- Continue its focus on D&G activities
- Respond to practical needs on the ground by funding activities that combine D&G with service delivery, including projects approved by the Grants Committee in the second half of 2003
- Renew a limited number of successfully completed and technically responsive projects, particularly those that have not been previously renewed or were only renewed once
- Award programmatic FOGs to smaller and marginalized CSOs and/or support discrete democracy-related activities

Exhibit II-2 summarizes Tamkeen’s planned grants program for 2004. This level of grant activity will obligate all of Tamkeen’s remaining grant funds, with the last awards made in the third quarter (and scheduled for completion by June 30, 2005).

Exhibit II-2. Summary of Grant Awards Planned for 2004

Grant Type	Number	Value
Simplified grants under D&G solicitations	14	\$1.7 million
Simplified grants under the APS	26	\$2.5 million
Renewed simplified grants	19	\$1.75 million
Programmatic FOGs	15	\$0.3 million
IT FOGs	20	\$0.05 million
Total	89	\$6.3 million

As discussed in the text box on the right and in Section I, the implementation of the ATC has slowed down Tamkeen’s grants program, but, as things currently stand, we anticipate that enough CSOs will be willing to sign the certificate for Tamkeen to continue successful operations and achieve the level of grant-making projected in Exhibit II-2.

C2a. Maintain Focus on D&G Activities

Tamkeen will continue to issue grants focusing on D&G activities in 2004. As discussed above, so-called “pure” D&G grants are one of two major focuses of Tamkeen’s simplified grants program, with the other being grants combining service delivery with D&G activities (issued under the APS). The impact assessment study conducted by Dr. Dajani found that both types of grants generate significant results, albeit in different ways and with different audiences. D&G grants to major institutions are able to have a larger impact over a wider cross-section of Palestinian society. They also allow organizations to address both local and national issues.

Tamkeen issued two D&G solicitations in 2003 (April and August) with a focus on reform and elections. In total, the Tamkeen Grants Committee approved 19 summary applications (of the 44 submitted) in response to these solicitations. However, only 7 of these prospective partners informed Tamkeen of their willingness to sign the ATC and develop full proposals. Approximately 6 additional CSOs have yet to decide whether to sign. In total, Tamkeen

ATC Impact on Tamkeen Grants in the Pipeline

The ATC requirement had a significant impact on Tamkeen’s grant program during 2003, but we expect this situation to improve during 2004 as CSOs come to decisions on their willingness to sign the controversial document. These decisions will affect the disposition of the large number of grants left in the “pipeline” at the end of 2003. “Grants in the pipeline” refers to the value of grants in development — those with summary applications approved by the Grants Committee, as well as those with approved grant proposals awaiting signature.

As of January 1, 2004, Tamkeen had approximately \$3.3 million in grants in the pipeline to CSOs that stated they were willing to sign the ATC, \$1.8 million in grants to CSOs stating that they would not sign the ATC, and \$1.6 million in grants to CSOs that were, as yet, undecided on the issue. As CSOs make decisions on the ATC issue, Tamkeen will assist them with the development of full proposals for submission to the Grants Committee. As funds are obligated and the project completes grant-making activities, applicants will be submitted on a first-come, first serve basis.

It should be remembered that CSO positions on the ATC could change and that the situation is in constant flux.

estimates that it will award 9 grants worth approximately \$1.1 million in early 2004, completing the D&G solicitation rounds of 2003. The results of the D&G solicitations in 2003 are documented in detail in our quarterly progress reports.

In early 2004, we will reissue a revised version of the D&G solicitation to a carefully selected list of CSOs, taking into account their position on the ATC and their involvement and past performance in the D&G field. Barring exceptional circumstances, such as the scheduling of elections or the like, this will be the last D&G solicitation issued by Tamkeen under the current contract. In total, we anticipate issuing five additional simplified grants totaling approximately \$600,000 to CSOs responding to this solicitation.

Result: 14 D&G-focused simplified grants worth a total value of \$1.7 million.

Responsibility: CSS, FA, and PCIT sub-teams.

Timing: First two quarters of 2004 (with some shorter-term grants awarded in the third quarter).

C2b. Respond to Practical Needs on the Ground (APS)

As explained in subsection B above, there is general agreement among all partners, civil society, and political leaders that, to maintain a level of credibility with their constituents, CSOs must provide them with much-needed basic services in response to continually deteriorating conditions. The impact assessment studies conducted by Drs. Dajani and Aldredge also argued that, in light of these conditions, many segments of the population will not be receptive to D&G elements if they are not accompanied by service provision.

Unlike most projects in the West Bank and Gaza, Tamkeen carefully links both the practical and strategic interests of Palestinian CSOs and their constituencies with their needs. This is done by supporting CSOs that provide basic services, while at the same time maintaining a focus on democratic, transparent, and accountable governance. Tamkeen strongly believes that, by introducing D&G elements in CSOs with a traditional focus on service delivery, it is making an impact on the way many partner CSOs operate, and encouraging them to see themselves as active members of society with the interest and experience necessary to engage in public discourse. This finding is confirmed in the two impact assessment studies.

We will revise the APS in January 2004 and, in close coordination with USAID, develop a list of CSOs invited to respond, taking into consideration target groups, priorities, and positions regarding the ATC. The APS contains specific selection criteria and guidelines for processing the applications on a rolling basis in a way that maximizes Tamkeen's ability to respond to applicants in a timely manner. It will encourage grants targeting Tamkeen's main areas of focus for 2004: youths/children and rural/marginalized areas. Grants issued under the APS program will follow Tamkeen's simplified grants system.

The Grants Committee had approved 18 summary applications for APS grants by the end of 2003, 10 of which came from CSOs we had not worked with previously. Of the 18, we anticipate that at least 12 successful full grant applications will be developed, totaling \$1.3 million. In addition, the CSS team is currently reviewing a total of 13 remaining summary applications, 8 of which are likely to be recommended to the Grants Committee for development into full applications. The reissued APS is expected to result in approximately 6

additional summary applications. Therefore, we project to award grants worth approximately \$1.2 million from summary applications that have yet to be considered by the Grants Committee. This brings the total estimated number of grants combining service delivery with D&G elements to 26 in Year 4, spread over the first two quarters. Certain elements of summaries reviewed but not approved may be identified for possible development and award of programmatic FOGs, as discussed in subsection D2 below.

Result: 26 simplified grants that combine service delivery with D&G for a total value of \$2.5 million.

Responsibility: CSS, FA, and PCIT sub-teams.

Timing: First two quarters of 2004, with some shorter term grants awarded in the third quarter.

C2c. Renew Successfully Completed and Technically Responsive Projects

As the first and second round of simplified grants approached completion, and based on extensive discussions internally and with USAID, it became clear that renewing successfully completed, technically responsive grants would not only minimize the efforts spent by the CSS team and partner CSOs, but also allow CSOs to build on their successes and continue program delivery with certain modifications based on lessons learned. The impact assessments conducted in 2003 confirmed the value of renewing successful grants. This does not mean that renewals will replace the search for new partners. Under the D&G solicitation, APS, and programmatic FOGs, Tamkeen will continue to expand the range of CSO grantees, working with USAID to strike a balance between new and old partners.

Grants are renewed based on a set of transparent, project-centered eligibility criteria developed in 2003. Tamkeen renewed 29 simplified grants for 23 CSOs in Year 2, and 13 grants for 13 CSOs in Year 3. The lower numbers are primarily due to some partners' refusal to sign the ATC.

In Year 4, Tamkeen is planning to renew up to 30 percent of in-force grants, resulting in a total of 14 renewals in Year 4—lower than the 50-percent renewal rate proposed in Year 3. With the renewal of five additional simplified grants, for which full applications were already in process at the end of Year 3, we anticipate issuing a total of 19 renewal grants in Year 4 worth a total of approximately \$1.75 million. As with other simplified grants, these renewals will be awarded in the first two quarters of the year, provided the closing dates do not extend beyond June 30, 2005.

Result: 19 simplified grants renewed for a total value of \$1.75 million.

Responsibility: CSS, FA, and PCIT sub-teams.

Timing: First two quarters of 2004.

C2d. Respond to the Needs of Nascent and Marginalized CSOs (Programmatic FOGs)

FOGs offer a quick mechanism to process applications, award grants, and implement discrete activities. These grants are capped at a total value of \$25,000. FOGs work on a fixed-price basis, making the reporting requirements less complex than those associated with the simplified grant mechanism. Initially, Tamkeen used the FOG mechanism to provide IT equipment and training to CSOs under our IT capacity-building efforts, as well as to provide equipment under our “rapid-recovery” grant program (designed in response to the Israeli incursions in April 2002).

Recognizing that FOGs could provide much more to our partner CSOs, Tamkeen introduced the programmatic FOG in 2003. It is designed to fund specific, discrete activities with short timeframes, usually no more than 8 to 12 weeks. Tamkeen adopted this approach based on requests and input from our partner CSOs. Together, we saw the need for a simpler mechanism to provide quick funding for discrete activities, and for nascent CSOs that lack the capacity to comply with simplified grant requirements. Tamkeen developed and USAID approved a supplement to the Simplified Grants Manual covering programmatic FOGs in the third quarter of 2003.

In 2004, we will focus the FOG mechanism on small and/or nascent CSOs, many of which responded to the APS. In their responses, or subsequent pre-award surveys, Tamkeen discovered that many lack the capability to implement simplified grants. Nonetheless, these organizations could make significant contributions on a local/regional level. Therefore, they are suited to programmatic FOGs, through which some will develop the ability to receive larger grants.

By the end of 2003, Tamkeen had identified a total of 12 project concepts for development into programmatic FOGs, and plans to identify others throughout 2004. In total, we expect to issue 15 programmatic FOGs in 2004, with a total value of approximately \$300,000—an average value of \$20,000 per grant. As the timeframe for FOGs is short, we will be able to issue these grants throughout the year. FOGs for IT capacity building are described in subsection D2.

As in last year’s work plan, Tamkeen remains ready to act in the event of severe deterioration of conditions on the ground (e.g., war in the region). In such an eventuality, we will consider reintroducing the rapid-recovery grants to provide immediate relief to CSOs suffering material losses (e.g., equipment damage) or to provide urgent programmatic services to target populations. This will not be budgeted for separately, but will be deducted from money marked for other FOGs. As previously mentioned, maximum flexibility is essential to allow Tamkeen to shift resources in response to new conditions and opportunities.

Result: 15 FOGs awarded for a total value of \$300,000.

Responsibility: CSS, FA, and PCIT sub-teams.

Timing: Ongoing throughout the year.

C3. Management Aspects of Grant-Making

In 2003, Tamkeen significantly strengthened its grants management systems. This included an updated Simplified Grants Manual, a supplement to the manual for programmatic FOGs, the launch of an audit program, and implementation of strengthened pre-award surveys and financial oversight procedures. These systems will be continued and expanded in 2004. We will also analyze the results of the initial set of audits to strengthen grant implementation oversight. More importantly, as detailed in subsection D, we will add a significant capacity-building component to help CSOs effectively implement grants in accordance with Tamkeen, USAID, and U.S. government requirements.

The primary lessons learned from the program and OMB-A133 audits completed in 2003 are two-fold. First, the U.S. government regulations and cost principles underlying Tamkeen's grant program need to be better explained to our CSO partners. Second, CSSs have to be better informed to hold CSOs to these requirements at the tranche payment request stage, and Tamkeen must be more stringent in enforcing compliance. We view strengthened compliance as an integral part of Tamkeen's capacity-building program, as improving financial and administrative systems will help our partner CSOs not only obtain and utilize Tamkeen funding, but also help them improve overall standards of institutional capacity and management. We intend to address these challenges on three levels: (1) improved procedures for grant awards and monitoring; (2) strengthened staff capabilities to support CSOs in budget development and implementation; and (3) capacity building for CSOs (as discussed in subsection D1).

C3a. Improved Procedures for Grant Awards and Monitoring

Grantee pre-award capability assessment. Tamkeen's approach to this issue has emphasized the relationship between the CSS and CSO as the lynchpin for determining pre-award capacity. This method of assessing programmatic capacity is important and has worked well in the past. To augment this effort, Tamkeen developed a pre-award capability assessment in 2003. It addresses the financial and administrative management standards mandated by the U.S. government. Combining technical, financial, and administrative elements of grant implementation, CSSs and the Tamkeen finance and administration team will jointly conduct assessments of all new CSOs starting in 2004. The results of these assessments will be used to determine whether capacity-building assistance must be provided as a condition of grant award. If internal resources do not permit the timely conduct of a pre-award capacity assessment, we have the ability to call upon the subcontracted firms under our Audit IQC.

Result: Completion of pre-award surveys on all new CSOs with accepted summary applications; more concrete idea of CSO capacity at the outset of application development process; ability to target any needed capacity-building assistance.

Responsibility: FA and CSS sub-teams.

External resources: Subcontracted firms under the Audit IQC.

Timing: Ongoing throughout the year.

Strengthened oversight of grant implementation. In addition to periodic CSS site visits, Tamkeen will institute a regular schedule of unannounced spot-checks of CSO financial

records. These spot-checks will entail a review of the CSO's accounting records and may involve a detailed financial report on costs expended to date. We will also observe the CSOs' financial systems and help pinpoint areas for improved management. The administrative and finance team will work with the CSS team to identify the CSOs to be visited and to prioritize the spot-checks. The list and schedule will be developed in coordination with the audit plan to avoid any overlap or over-extension of resources. In addition, as a means of strengthening our financial monitoring procedures, we will begin to require a detailed summary financial report from each CSO when a tranche payment request is submitted. In this report, we will check actual expenditures versus the budget in partnership with CSOs in order to better monitor grant funds.

Result: Better managed grants, fewer problems revealed during audits, and strengthened capacity of CSOs.

Responsibility: FA and CSS sub-teams.

External resources: Subcontracted firms under the Audit IQC.

Timing: Ongoing throughout the year.

Continuation of audits. The Tamkeen audit plan will continue throughout 2004 with program audits, OMB-A133 audits, and accounting system and internal controls audit. Our audit subcontractors can also be called upon to conduct pre-award capacity assessments as needed.

Result: Target of five audits per quarter, with the definitive number dependent on the level of funding of some CSOs as they hit thresholds to trigger a program audit and/or OMB A-133.

Responsibility: FA sub-team.

External resources: Subcontracted firms under the Audit IQC.

Timing: Ongoing throughout the year.

C3b. Strengthen Staff Ability to Support CSOs in Financial Management and Budgeting

Lessons learned from the first round of the Tamkeen audit program demonstrate that CSOs need to have a better understanding of the financial management requirements of the simplified grant mechanism. Part of the misunderstanding starts at the budgeting stage of the grant application process and how activity costs are established, classified, and determined to be allowable, allocable, and reasonable. We will conduct workshops for the CSS and administrative and finance teams in early 2004 to strengthen their budgeting skills and knowledge of related USAID and U.S. government rules. These workshops will allow the CSS team to transfer valuable skills to CSOs—skills they can use even after the grant-making phase of Tamkeen is over, as financial management and budgeting principles are essential to promoting the long-term financial health and sustainability of any organization.

The topics of the workshops will include general budgeting principles and underlying U.S. government regulations. They will be presented in the context of lessons learned from recent

audit findings and common financial mistakes of CSOs and how to avoid them. Elements of the training will be rolled out to CSOs in conjunction with the financial portion of the “Getting to Grants” training (see subsection D1 below), as well as in the almost daily interaction between the CSS team and CSOs. We will develop the workshop materials with a view to providing quick and targeted training as needed.

Result: Improved budgeting capacity of CSOs at the cost proposal stage, better understanding of financial requirements by CSSs, and standard use of cost proposal template.

Responsibility: FA and CSS sub-teams.

Timing: First quarter and ongoing throughout the year as needed.

C4. Monitor Grant Program Work Flow

As previously noted, Tamkeen is committed in Year 4 to issuing the remaining grants under its current contract with USAID. This will demand a high level of intensity of grant making by CSS and other Tamkeen teams, particularly during the first half of the year. At the same time, we will continue to expand our capacity-building initiatives and to implement new and strengthened compliance and monitoring efforts. A timeline of our activities is provided in Annex A.

Exhibit II-3 below summarizes our projections for grants issuance and management in Year 4.

Exhibit II-3. Summary of Grant Issuance and Management: Projections for Year 4

	Q1	Q2	Q3	Q4	Totals	Total Value
CURRENT PORTFOLIO						
Simplified grants in force as of January 1, 2004: 40 valued at \$3,679,628						
<i>Simplified grants ending in 2004</i>	-25	-4	-4	-3	-36	\$3,213,219
Volume of in-force grants per quarter	15	41	58	63		
SIMPLIFIED AWARDS						
New simplified (D&G)	6	6	2	0	14	\$1,700,000
New simplified (APS)	12	8	6	0	26	\$2,500,000
New simplified (renewals)	12	7	0	0	19	\$1,700,000
Total Simplified Grants by Quarter	45	62	66	63		
<i>Average Simplified load per CSS</i>	6	8	8	8		
FIXED-OBLIGATION GRANTS (FOGS)						
Programmatic FOGs	2	3	5	5	15	\$300,000
IT FOGs	5	5	5	5	20	\$50,000
Total FOGs	7	8	10	10	35	\$350,000

The average management load of six to eight simplified grants per CSS is in line with past Tamkeen experience, as well as the project’s initial estimates for grant load per staff member. Other similar projects, like the Civil Society Support Program in Indonesia, also have approximately the same number of grants managed by one staff member. It should be

remembered that the CSSs' responsibilities extend well beyond grant making into many other areas of project activity, in particular participation in all of our capacity building initiatives.

D. Supporting the Role of CSOs Through Capacity Building and Technical Assistance

As noted at the beginning of this section, Tamkeen's integrated approach for 2004 includes three different and interrelated methods for increasing the ability of Palestinian CSOs to participate in public discourse: grants, capacity building, and technical assistance. Grants are our primary mechanism for achieving this goal as they allow CSOs to survive, grow, and implement projects that increase their voices in public debates and help them act as a counterbalance to major public and private sector institutions. Grants also increase the participation of thousands of Palestinian beneficiaries from various sectors of society.

That being said, Tamkeen will continue to develop and provide targeted capacity building and technical assistance to the CSO community. These efforts will include improving CSO capacity to implement grants in accordance with USAID and U.S. government requirements—skills that can be used beyond the duration of the Tamkeen project. We will also continue major capacity-building initiatives in IT, training best practices, and advocacy skills and techniques. Other capacity-building efforts are mentioned throughout this work plan, most importantly in relation to communications and results monitoring (see Sections III and IV). Finally, we plan to develop other capacity-building initiatives to address new opportunities and developments as they evolve, as well as technical assistance to support the effective implementation of grant proposals.

D1. Strengthen CSO Capacity to Effectively Design and Implement Grant Proposals

As noted in subsection C above, the audits of Tamkeen grants, as well as pre-award assessments, reveal weaknesses in grant implementation on the part of some CSOs, particularly in relation to financial and administrative management. In addition, Tamkeen's new grantees, many of which are small to medium-sized (reflecting our focus on CSOs working in rural and marginalized areas), require additional remedial assistance. As a result, the project will provide five levels of capacity-building assistance to CSOs related to grant proposal design and implementation during 2004. These will complement strengthened procedures, oversight, and training for the CSS team, as discussed in subsection C3.

One-on-one capacity building. Since the beginning of the project, Tamkeen's highly qualified CSS team has been the primary mode of capacity-building assistance to grantee CSOs. The team's constant one-on-one training helps CSOs develop grant proposals and implement grants in a timely and effective manner, yielding significant results. This fact was recognized in the two impact assessment studies, in which many CSOs reported that their skills in proposal development and implementation have improved significantly as a result of Tamkeen assistance. CSOs also reported that skills learned through Tamkeen are being used to successfully apply for grants from other donors, an important aspect of sustainability. The CSS team will continue these efforts during Year 4.

Result: Improve grant proposals and effective implementation of grants.

Responsibility: CSS and FA sub-teams.

Timing: Ongoing throughout the year.

“Getting to Grants” training. Tamkeen developed and began delivering training on the preparation of grant proposals in 2002. This training was subsequently updated in 2003 to reflect changes in our grants program (as codified in the revised Simplified Grants Manual), and was implemented in Gaza (Khan Younis) in December 2003. The four-day training covered the skills necessary to develop effective grant proposals in response to Tamkeen solicitations. Most of the skills, of course, are useful when applying for grants from any international donor (as stated by CSOs during interviews and in the impact assessment studies).

We will deliver the “Getting to Grants” training to new CSOs (as well as current grantees in need of updated skills) throughout the first half of the year. Most importantly, the revised program will explain more fully the financial and administrative management requirements and compliance aspects inherent in the simplified grants program, and will introduce the new cost proposal budgeting templates and procedures developed in 2003.

Result: Improved grant proposals and effective implementation of grants.

Responsibility: CSS and FA sub-teams.

Timing: 4 training sessions in the first and second quarters, as needed.

Financial and administrative improvement plans. As discussed in subsection C3a above, Tamkeen initiated pre-award capacity assessments and financial spot checks for new CSOs at the end of 2003. The findings of the initial rounds of audits revealed some areas for improvement among CSOs. Tamkeen will develop and implement financial and administrative improvement plans in 2004 to address areas in need of improvement, particularly for small to medium-sized CSOs.

The objective of this task is to provide a plan of action to rectify problems and concerns identified in pre-award assessments, spot-checks, and audits, with a view to making the capacity-building and improvement process less onerous and more of a cooperative experience between CSOs and Tamkeen. The pre-award capacity assessment and financial spot-check results will be provided to CSOs in a report, with specific recommendations for action, all of which must be accepted by the time of award, or to continue the current grant. The plans will establish a schedule of tasks, with required follow-up by Tamkeen to ensure all findings are addressed and are in line with compliance regulations. We envision bringing back the former Tamkeen grants manager, Paul McVey, on a short-term assignment to initiate this process and to design implementation of this activity. Mr. McVey has successfully implemented such financial improvement regimes elsewhere, and is uniquely qualified to replicate this process for Tamkeen.

Result: Improved financial capacity of CSOs (specific number dependent on responses to solicitations, outcomes of audits, etc).

Responsibility: FA and CSS sub-teams.

External resources: Short-term international consultant.

Timing: Ongoing throughout the year.

Financial system management and development workshops. As noted in subsection C, the financial problems that have occurred thus far have not, for the most part, been due to intentional misuse of funds or malfeasance. Rather, they stem from lack of understanding of the regulations, inadequate implementation of the requirements, and weak financial and management systems. To complement the financial improvement plans discussed above, Tamkeen plans to develop a financial management course to assist a wider audience of CSOs in development and codification of such systems and procedures. We intend to rely on short-term technical assistance (most likely Mr. McVey) to develop the modules for the course. It will cover the development of financial and administrative management systems, drafting of manuals and policies that incorporate administrative and financial requirements, and the basics of U.S. government and USAID grant regulations.

Result: Institutional development of CSOs through administrative and financial systems development and better grants management.

Responsibility: FA and CSS sub-teams.

External resources: Short-term international consultant.

Timing: One course per quarter, starting in the second quarter and continuing as needed.

Financial management hardware and software. Finally, Tamkeen intends to utilize the FOG program to address the hardware and software needs of CSOs' financial management regimes. We will not only provide IT equipment, but also accounting system packages and requisite training to enable CSO accountants to better implement activities and/or upgrade their systems. Any needed equipment and software will be identified and documented in a transparent manner as part of the pre-award capacity assessment and financial spot-check process.

Result: Better financial management and reporting by CSOs.

Responsibility: FA, CSS, and PCIT sub-teams.

Timing: Ongoing throughout the year.

D2. Increase the IT Capacity of Grantee CSOs

Since 2001, Tamkeen has worked with Palestinian CSOs to increase their IT capacity by offering grants (FOGs) for both training and equipment. We have assessed each new grantee CSO for IT needs and designed an assistance package. In 2003, we started offering additional assistance in the form of courses (organized by the project through local institutions) to increase the IT skills of CSO staff members. In total, we have provided 55 IT FOGs with a total value of approximately \$267,000 over the life of the project, and trained 161 CSO staff members in various IT skills.

In 2004, we plan to expand the range of equipment offered under the IT FOG program, and continue to provide training opportunities through FOG grants. In addition, we will provide selected CSOs with full IT packages as needed, including local network wiring, equipment,

training, and Internet connections (for a limited period of time). In total, we expect to issue 20 IT FOGs with a total value of \$50,000 during the year.

We will also continue to contract for training courses and to send selected CSO personnel (as determined through needs assessments) to training programs already being offered by local institutions.

In addition, the project plans to conduct a series of specialized workshops for CSO staff members, including:

- *Basic IT planning and self-assessment.* This one- to two-day program will be designed for CSO managers (i.e., those at a decision-making level). It will provide them with a basic overview of IT technology and planning techniques. More importantly, it will teach them introductory principles of IT self-assessment using the tools developed and implemented by Tamkeen as part of its IT capacity-building program. With the knowledge gained from the workshop(s), managers will be able to assess and address their organizations' basic IT needs in partnership with IT professionals as needed.
- *IT resource persons.* Small and medium-sized CSOs do not have dedicated IT professionals on staff. Rather, like small organizations around the world, they rely on external service providers for their IT needs. While some major installations and problems may require external professionals, most everyday IT issues can be resolved by a non-professional with some basic IT knowledge. To help create these in-house "resource persons," Tamkeen will offer a short course in basic computer maintenance and "help desk" tasks. The course will target low- to mid-level CSO employees with some aptitude in computers. Those who complete the course will be expected to serve as IT resource persons within their CSOs. We expect that the course will consist of approximately 50 hours of instruction by an external trainer.

Finally, we will conduct a limited number of focus groups on the IT capacity-building program and engage an outside evaluator to assess the impact of this program and recommend modifications. The impact assessment is discussed in Section IV of this work plan.

Results: Strengthened IT capacity of partner CSOs through the issuance of 20 IT capacity-building FOGs, worth a total of approximately \$50,000, and related training.

Responsibility: PCIT and CSS sub-teams.

External resources: Local consultant for planning and self-assessment workshop; local training provider for IT "resource person" course.

Timing: 20 FOGs for IT equipment and training (throughout the year); workshop on basic IT planning and self-assessment (second quarter); course for IT resource persons (second and third quarters).

D3. Develop and Implement Advanced, Standards-Based Training Capacity-Building Program

Tamkeen will continue to work with the Training Best Practices Committee, created in 2003 with project assistance, to develop and implement an advanced standards-based training capacity-building program. This initiative will build on the training best practices program developed and implemented by Tamkeen in 2002 and 2003. The advanced program will consist of five modules, which will be tested before being transferred to member institutions for implementation with Palestinian CSOs. The five modules are:

- Training needs assessment and training planning
- Training program design and materials development
- Master trainers
- Monitoring and evaluation
- Effective training management and quality assurance

Each module will consist of a four- to five-day course. The modules will be developed in close partnership with members of the Best Practices Committee, using their staff members in the initial testing and development phase. While Tamkeen and its consultants are working on course development and implementation, Tamkeen will also work with the committee to finalize three sets of training standards, which were drafted with project assistance in 2003. Once finalized, the standards will be distributed and widely promoted by committee members through public meetings and direct contacts with other organizations in the region.

In addition, the committee will continue to develop internal procedures and policies, as well as explore ways in which it can establish itself as an independent, officially registered body. Tamkeen expects to provide limited assistance in these tasks throughout the year.

Result: Creation of an advanced training best practices program and local capacity to deliver the program.

Responsibility: PCIT and CSS sub-teams.

External resources: Short-term expatriate consultant; two short-term local consultants.

Timing: Development of five program modules throughout the year.

D4. Deliver Training in Advocacy Skills

In 2003, Tamkeen engaged the U.S.-based Advocacy Institute to conduct training in advocacy skills for Palestinian CSOs. This program consisted of four parts:

- *Needs assessment and introductory workshops* (completed in December 2003). This was a one-day workshop for participants in Gaza and the West Bank, as well as a roundtable with CSO directors and extensive discussions with the Tamkeen team. The results of the workshop are being used to tailor the advocacy fellows program discussed below.

- *Case stories* (due February 1). Each workshop participant will write a case story based on their own advocacy experience and/or that of their institution. These stories will also be used to tailor the fellows program.
- *Advocacy fellows program* (scheduled for late April/early May). These four and a half-day workshops will be conducted in Gaza and the West Bank, providing approximately 30 participants (15 in each location) with a solid grounding in advocacy skills and techniques. As noted above, the workshops will be developed based on the participants' own experiences and needs.
- *Advocacy resource persons program* (scheduled for late August/early September). This is another intensive and advanced course in advocacy techniques designed to create "resource persons" or trainers in advocacy techniques. Through these trainees (who will be selected from the top participants in the fellows program), we hope to establish a sustainable advocacy program in Palestine. Participants will be expected to serve as trainers and resource persons in their own institutions and to help deliver training and provide assistance to other institutions.

As this program draws to a close in the third quarter, we will explore options for next steps. This may include contracting with local institutions to extend the training to other CSOs utilizing the "resource persons" training in the fourth phase of the program.

Result: Improved advocacy skills of targeted CSOs and local capacity to deliver high-quality training in advocacy skills and techniques.

Responsibility: PCIT and CSS sub-teams.

External resources: Advocacy Institute (under subcontract).

Timing: Completion of the four phases of the advocacy training program in the first to third quarters.

D5. Develop Additional Targeted Training Programs to Respond to CSO Needs

To respond to CSO needs and the evolving political situation on the ground, Tamkeen developed the Advocacy Institute program and a series of workshops on elections during 2003. We expect to continue to develop programs of this sort in 2004 for delivery under this work plan and beyond. Needs will be determined based on consultative and bilateral meetings with CSO partners during the year and in close cooperation with USAID. At this point, we expect to continue to develop programs related to elections, particularly CSOs' roles in elections and technical assistance to support the successful implementation of grant proposals. In addition, we will explore other training and technical assistance topics, including campaign development, networking/alliance building, and more advanced communication skills.

Result: At least one training initiative designed and initiated before the end of the year.

Responsibility: PCIT, CSS, and FA sub-teams.

Additional resources: Short-term expatriate consultant(s) (depending on program); short-term local consultant(s).

D6. Determine Demand for Full Implementation of the PONAT

Now that it has a completed Participatory Organizational Needs Assessment Tool (PONAT) in both English and Arabic, Tamkeen plans to consult with and examine possible avenues for using it in our capacity-building efforts. As a first step in this regard, we will conduct workshops for the CSOs, service provider, and donor community (as originally scheduled for 2003 but reprioritized). Based on these workshops, we will determine demand for additional implementation of the PONAT and for offering selected CSOs the opportunity to benefit from capacity-building assistance packages. If this course is taken, selected CSSs in the West Bank and Gaza will serve as focal points for this effort, under the guidance and supervision of the director of programming and communications, the director of finance and administration, and the director of field operations.

Introduction of the PONAT to the CSO community should provide Tamkeen with the feedback needed to determine steps to be taken in the last two quarters of 2004 and the first two quarters of 2005, including its possible publication and wide distribution for use by non-partner CSOs and donors, as well as the development of targeted capacity-building initiatives.

Result: Introduction of the PONAT to CSOs, and assessment of demand for its possible use to identify CSO capacity-building needs.

Responsibility: PCIT, CSS, and FA sub-teams.

External resources: Local short-term consultant(s) to assist with presentation of the PONAT to outside audiences.

Timing: Workshops/meetings with CSO and donor communities initiated in the first quarter; follow-up activities programmed based on the results of these workshops.

D7. Other Capacity-Building Initiatives

This section has presented some of our capacity-building initiatives; others are integrated into the remainder of the work plan:

- Section III, “Communications and Outreach,” discusses the following capacity-building initiatives: training in media relations and communications skills for CSOs; roundtables to improve networking between CSOs and the media; training for journalists; and conferences to improve communication and information sharing between CSOs.
- Section IV, “Results Monitoring,” addresses training in performance monitoring for CSOs.

SECTION III

Communications and Outreach

A. Background and Objectives

Tamkeen established a programming and communications team in 2003 in response to a growing need to inform others about the project's activities and its success in strengthening Palestinian CSOs. In its first year, the team developed and launched a new project website, began distributing regular updates on CSO events to USAID, strengthened communication among major international donors through the creation of a donors group, and generally improved the quality and quantity of information provided in Tamkeen's reports. We will continue these efforts in 2004, as well as complete some outstanding activities from the 2003 work plan, most notably development of a brochure on the project.

More importantly, 2004 will see the programming and communications team turn its attention toward helping strengthen the communication capacities of Palestinian CSOs and journalists. This focus on capacity building is reflected throughout this work plan.

Our communication efforts have two overall objectives:

- Increase the capacity of Palestinian CSOs to communicate their goals, objectives, and successes to target populations and key groups, including the donor community, opinion leaders, and the media
- Increase transparency, understanding, and appreciation of Tamkeen's efforts among the project team, USAID, grantees, potential grantees, key stakeholders, and opinion leaders

Both objectives are integral to realizing Tamkeen's overall purpose of strengthening the role of CSOs in public discourse. The programming and communications team provides overall leadership to this component, but all activities will be coordinated closely with Tamkeen management and other Tamkeen teams, particularly CSSs.

B. Increasing the Communication Capacities of Palestinian CSOs

Tamkeen's partner CSOs regularly engage in efforts to raise awareness and participate in public debates on a wide range of issues, both local and national. Initial investigations by the project team indicate that some larger CSOs focused on D&G are good at working with the media, but that small/medium-sized CSOs and service delivery organizations lack capacity in this area. These observations were confirmed by participants in a series of workshops held in December 2003 with media and CSO representatives. In 2004, our efforts will focus on media relations and public relations training for CSOs and training for Palestinian journalists.

B1. Increase Networking Between CSOs and the Media

In the fourth quarter of 2003, Tamkeen initiated the first in a series of roundtable discussions between CSO and media representatives. The meetings were held in Nablus, Bethlehem, Ramallah, and Gaza City, and the findings are discussed in our quarterly progress report for

the fourth quarter of 2003. At the request of participants, we will continue these sessions on a quarterly basis during 2004, with a view to building stronger relationships between the media and the CSO community. Each session will focus on a specific topic (e.g., CSOs and the NGO registration process), often featuring a guest speaker.

In a related initiative, we will develop a media list for distribution to CSOs and a list of CSO experts for distribution to the media. On the CSO side, media lists will allow them to quickly send press releases or invitations to events. On the media side, expert lists are a good way of identifying interview sources and “expert commentators” on a wide range of subjects. CSOs will benefit from the publicity received when one of their employees appears as a respected voice in the press.

Result: Improved and expanded media coverage of CSO activities.

Responsibility: PCIT and CSS sub-teams.

Timing: Roundtables (quarterly); media list (second quarter); expert list (third quarter).

B2. Improve Media Relation Skills of CSOs

While relationship building is part of improving media relations, many specific skills are also needed. Tamkeen will conduct quarterly workshops in 2004 to teach these skills to selected CSOs. Topics will likely include: the basics of public/media relations, how to write a press release, how to conduct a press conference, strategies for developing and delivering messages to local and international audiences, and developing press packets and other media relations materials. We will strive to conduct these workshops in locations throughout the West Bank and Gaza, tentatively in Nablus, Ramallah, Bethlehem, and Gaza City.

Result: Improved media relation skills among grantee CSOs.

Responsibility: PCIT and CSS sub-teams.

External resources: Local short-term consultant (possible on some topics).

Timing: Approximately quarterly.

B3. Improve the Ability of Journalists to Cover the Democratic Process and CSO Activities

In 2003, Tamkeen held a roundtable discussion and several one-on-one meetings with local media representatives to assess their needs for training in covering the democratic process, particularly the activities of CSOs, but also including coverage of elections and Parliament. They indicated a number of needs, including training for journalists. During the December 2003 workshops, reporters identified investigative journalism and feature writing as two areas where training would be useful. Tamkeen will develop a program to meet these needs. The exact shape of the program will be determined in the first quarter of 2004 in continued consultation with journalists and their editors, and in light of a project on media training proposed by the Arab Thought Forum and recently approved by the Grants Committee. We will recruit a qualified trainer after specifying the scope of the program.

Following the initial program, we will design training for Palestinian journalists on elections coverage. This training will only be implemented in the event that elections are actually scheduled.

Result: Improved coverage of CSOs and the democratic process in the Palestinian media.

Responsibility: PCIT and CSS sub-teams.

Short-term personnel: Journalism trainer/consultant.

Timing: Workshop for media representatives (third quarter); workshops on elections coverage (timing to be determined).

B4. Improve CSO-Donor Relations

As part of our efforts to help CSOs pursue non-Tamkeen funding sources, we will organize a series of roundtable discussions for international donors, projects, and CSOs. This will provide CSOs with the opportunity to learn about donor-funded programs, donor priorities, and how to apply for funding. In turn, donors and projects will learn about the activities and successes of various CSOs, and possibly identify potential partners for future efforts. We will organize these sessions in various locations throughout the West Bank and Gaza (e.g., Nablus, Ramallah, Bethlehem, Gaza City, and Khan Younis).

Result: Increased knowledge among grantee CSOs of funding opportunities; and increased knowledge among donors of the range of CSOs and the types of projects they implement.

Responsibility: PCIT, CSS, and FA sub-teams.

Timing: Fourth quarter.

B5. Improve Grantee-to-Grantee Relationships and Coordination

As part of our capacity-building and networking initiatives, we will organize two one-day conferences—one in the West Bank and one in Gaza—for CSOs and other invited guests. During these events, Tamkeen grantees will share their experiences, successful program ideas, and lessons learned. This will allow CSOs to learn about new and tested project ideas from one another, and to identify areas of possible coordination and cooperation. We will explore ways to coordinate with local NGOs in organizing the conferences, as well as the possibility of making this a regular event. The publicity, scope, and exact timing for this event could be effected by political sensitivities, particularly with regard the ATC (see Section 1).

Result: Improved understanding of successful project ideas among CSOs.

Responsibility: PCIT, CSS, and FA sub-teams.

Timing: Third quarter.

C. Increasing Awareness of Tamkeen and Its Benefits

Tamkeen will also continue to expand the amount and quality of information it distributes to external audiences about its own operations, as well as the benefits it is creating for the Palestinian people. Major targets of these activities include:

- Tamkeen’s partner CSOs
- Other CSOs and influential persons in Palestine
- USAID officials
- Other international donors and projects
- Palestinian public
- Interested public outside Palestine

C1. Maintain Tamkeen Website

Tamkeen launched a new website in 2003 (www.tamkeen.org) featuring success stories from grantees, a general overview of the project, detailed information on the grants program, a description of capacity-building initiatives, and links to relevant resources and documents. We will continue to maintain the website and add content in 2004, including at least one new success story each month (e.g., on grantee activities or capacity-building efforts). We will also add new capacity-building information and expand the list of resource links. When new stories and/or information are posted, we will send announcements to a list of key audiences, including USAID, other donors, Palestinian CSOs, and the media.

Result: Increased and timely information on Tamkeen activities and those of grantee CSOs conveyed to key audiences.

Responsibility: PCIT, CSS, and FA sub-teams.

Timing: Ongoing throughout the year.

C2. Develop and Distribute Printed and Electronic Information on Tamkeen

We are currently in the process of developing a brochure providing a general overview of our activities, with a focus on the successes achieved by CSO grantees with Tamkeen support. The brochure will highlight four to five “success stories,” with some background information on the project’s purpose, progress to date, and capacity-building efforts. It will also provide contacts for more information on project activities. Target audiences include Palestinian CSOs (particularly non-grantees), local and international government officials, the media, and the general public. The brochure will be produced in both English and Arabic.

We will also develop a fact sheet providing a one-page summary of the project’s activities in 2004. It will outline Tamkeen’s grants program and upcoming capacity-building initiatives, and will be handed out at Tamkeen-organized meetings and other events. The fact sheet will primarily target CSOs and other groups that may need more information on the exact shape of our program in 2004.

Finally, we will continue to produce and distribute a weekly update on project-related news and events. Redesigned in late 2003, this publication offers a brief overview of capacity-building and other initiatives conducted by Tamkeen during the week, as well as a list of

upcoming events planned by grantee CSOs. The publication is distributed directly to USAID and the Chemonics home office. We will explore the possibility of expanding the distribution list early in the year. The information from the weekly update is also posted on Tamkeen's website.

Result: Increased understanding of Tamkeen's goals and activities.

Responsibility: PCIT, CSS, and FA sub-teams.

External resources: Graphic designer and print house for brochure.

Timing: Brochure and fact sheet (first quarter); weekly update throughout the year.

C3. Increase Direct Communication With Major External Audiences

Since its inception, Tamkeen has launched a number of initiatives to increase formal and information communications with and among key external audiences. These have included grantee and non-grantee CSOs, USAID, other donors and projects, Palestinian agencies and influential figures, and many others. Under this work plan, we will continue to coordinate meetings of the International Donors Group we helped establish in 2003, which brings together donors and projects providing grants to Palestinian CSOs, particularly in the D&G area.

We will also continue to conduct formal consultative meetings in the West Bank and Gaza. These annual meetings include both grantee and non-grantee CSOs, as well as other community members. They are designed to increase awareness of Tamkeen's program for the year and, more importantly, to elicit feedback and suggestions from community members.

Finally, Tamkeen's management and teams will continue to hold periodic bilateral and multilateral discussions with various segments of Palestinian society and international organizations operating in the West Bank and Gaza. In the past, such meetings have included current and former ministers, the Commission on NGO Affairs, PLC members, the head of the Palestinian Elections Commission, CSO leaders (such as the leadership of the Palestinian NGO Network), key figures in other donor organizations, as well as locally based and Washington-based USAID officials.

Result: Increased coordination between Tamkeen and other projects; regular feedback on Tamkeen program and activities from key audiences; and increased understanding of Tamkeen and its activities among key groups.

Responsibility: Project management, PCIT, CSS, and FA sub-teams.

Timing: Consultative meetings (first two quarters); international donors group (quarterly); other meeting and roundtables (throughout the year).

SECTION IV

Results Monitoring

A. Background and Objectives

As noted at the beginning of the work plan, Tamkeen is dedicated to increasing the participation of Palestinian CSOs in public discourse. This focus is drawn directly from USAID's Strategic Objective 3, "more responsive and accountable governance," and IR 3.1, "increased participation of CSOs in public discourse." IR 3.1 has three sub-IRs: IR 3.1.1, "increased capacity of CSOs to participate in public discourse," IR 3.1.2, "CSOs effectively aggregate and articulate citizen issues," and IR 3.1.3, "CSOs effectively disseminate information to citizens on public issues."

Tamkeen uses two different methods to measure progress related to IR 3.1 and its sub-IRs. First, our impact assessment program provides qualitative analysis using the services of highly qualified international and Palestinian consultants. In 2003, these efforts included two broad examinations of aspects of Tamkeen's grants program: (1) the impact of grants combining service delivery with D&G activities, and (2) the impact of grants in the disability sector. Both studies were approved by USAID. We also conducted a study of one individual grantee and initiated studies of two others at the request of the Tamkeen Grants Committee.

Second, in an effort to collect quantitative data on project successes, we launched the USAID-approved Performance Monitoring Plan (PMP) and collected data on all closed grants. The PMP was substantially modified in 2003 so that it would more directly measure project results and be easier to use. Currently, all CSOs report PMP data at the end of their grants. This information is then fed into the project's grants management database, which produces results. The first full set of results, analyzing Year 1 and Year 2 grants, will be released in 2004.

We will continue both our qualitative and quantitative performance monitoring efforts. On the qualitative side, we will conduct two additional studies on aspects of the Tamkeen grants program. On the quantitative side, the completion of all Year 2 grants and some Year 3 grants will allow us to make initial comparisons and draw conclusions about the progress of the program. Both impact assessment methods are designed to provide recommendations and direction for the remainder of the project, as well as assist USAID in designing future programs in this sector.

Tamkeen will also begin working with CSOs to increase their performance monitoring capabilities. This capacity-building initiative will include training for CSOs in performance monitoring techniques. We will also work with CSOs to incorporate a greater emphasis on performance monitoring into grant proposals. The need to incorporate stronger performance monitoring techniques and systems in grant implementation plans (and at CSOs in general) was one of the major findings of the two impact assessment studies conducted in 2003.

B. Analyze Results Generated by Tamkeen's Performance Monitoring Plan

Tamkeen revised and institutionalized the PMP in 2003, and then collected data for all closed grants, including all grants issued in Year 1 and approximately two-thirds of grants issued in Year 2. The remaining Year 2 grants should close within the first quarter of 2004, at which point PMP data will be reported by CSOs. This will allow us to produce a summary of results and analysis for the initial two years. The results are expected to indicate the extent to which Tamkeen grants contributed to the realization of the three sub-IRs under IR 3.1, as well as provide guidance on future program improvements. We will summarize and analyze the data as part of our first quarterly progress report for the year, identifying how our program will be improved as a result. This analysis will be updated at the end of the year.

Result: Analysis of data generated by closed Year 1 and Year 2 grants, with recommendations for program modifications.

Responsibility: PCIT, CSS, and FA sub-teams.

Timing: Second quarter (with data maintained throughout the year).

C. Continue Impact Assessment Program

To complement its quantitative performance monitoring efforts, Tamkeen also conducts impact assessment studies using external consultants. We conducted two such studies in 2003, as well as a specific study of one CSO. During 2004, we plan to conduct two additional studies on the impact of the project. The first will examine Tamkeen's IT capacity-building program, particularly grants for both equipment and training to partner CSOs. This study will help us improve the IT FOG program and provide guidance on future IT capacity-building efforts during the fourth year and beyond.

The second major study will be defined in coordination with USAID during the second quarter, and implemented in the third and fourth quarters. Possible areas for examination include assessing the contribution of grants focused on youths and children (identified as an important area by the 2003 impact assessment studies) or grants in the water and environment sector. We will remain flexible in defining this study to respond to USAID needs.

We will also remain flexible and ready to conduct assessments of the impact of individual grants to CSOs (or a series of grants to the same CSO). These studies will be defined by Tamkeen in close consultation with the Grants Committee. We plan to conduct two to three such studies during the year.

Results: Improvements to Tamkeen's IT capacity-building program based on a study of results to date; better understanding of the effectiveness of other aspects of Tamkeen's program as determined by additional studies specified in consultation with USAID and the Grants Committee.

Responsibility: PCIT, CSS, and FA sub-teams.

External resources: Short-term Palestinian advisors for assessment of IT capacity-building program and for studies of individual grants; short-term international advisor for study of other program elements (as needed).

Timing: IT capacity-building study in the second quarter; additional study(ies) in the third and fourth quarters.

D. Increase the Performance Monitoring Capacity of CSOs

Tamkeen will start providing capacity-building assistance to Palestinian CSOs in performance monitoring during 2004. This will include both formal workshops and one-on-one consulting as needed. As noted above, we will also emphasize the importance of including performance monitoring elements in new grant proposals, a need indicated by the 2003 impact assessment studies.

The formal capacity-building program will include two- to three-day workshops on the development and implementation of performance monitoring plans and systems for partner CSOs (current and former), potential partners, and other interested parties (space permitting). We will strive to conduct these workshops in various areas of the West Bank (e.g., Nablus, Ramallah, and Bethlehem) and Gaza, with a focus on practical, hands-on training tailored to the needs of participants.

Based on the outcome of this initial series of workshops, we will identify other needs in this area and, as needed, design follow-up activities for late 2004 and 2005.

Results: Improved capacity of partner CSOs to assess the impact of their grants.

Responsibility: PCIT and CSS sub-teams.

External resources: Short-term international advisor, perhaps with the support of a Palestinian advisor.

Timing: Second and third quarters.

SECTION V

Overall Management

A. Background and Management Requirements

Throughout 2003, Tamkeen continued to solidify and operationalize the project's new management structure, which was introduced in the summer of 2002. The division of responsibilities between the four director-level positions—field operations; programming and communications; administration, finance, and grants compliance; and the Gaza office—allowed greater focus on specific elements of the Tamkeen program, while fostering a more holistic approach to capacity building with our CSO partners. The expansion of CSS presence in the West Bank and Gaza, in conjunction with the establishment of additional satellite offices in Bethlehem, Nablus, and Khan Younis, helped us successfully serve CSOs in areas where access is more limited.

In addition, Mustafa Mar'i assumed the vacant position of director of field operations in March 2003 and Majida Awashreh filled the open CSS position in July 2003. To lead the finance and administration sub-team, Sarah Nugent joined the project as a director in September 2003, replacing Jennifer Baker, who returned to the Chemonics home office. The newly created positions of administrative/finance assistant and communications/outreach specialist were filled by Mahmoud Musleh and Walid Batrawi, respectively. These positions were created to ease the workload in these two departments and have helped provide more targeted support to Tamkeen's internal processes, as well as those of our CSO partners. As a whole, the expanded and strengthened staffing structure has proven successful and has contributed to the execution of nearly all the activities proposed in the 2003 work plan.

Looking forward to management priorities and requirements for 2004, Tamkeen recognizes the possibility that the number of CSO grantees may shrink due to the effects of the ATC. At the same time, we expect that our grants portfolio and partner CSOs will require more capacity-building assistance, administrative and financial follow-up, and compliance support than ever before. This means an increased level of management assistance and internal administrative time required to successfully work with our partner CSOs—from processing FOGs, to conducting financial checks and pre-award assessments, to monitoring and evaluation follow-up.

To address these evolving management and programmatic concerns, we renewed efforts, in the last quarter of 2003, to clarify structural issues, lines of authorities, and responsibilities between director-level positions, particularly with regard to field operations and finance/administration. This is particularly important as all staff roles will become more and more integrated over the course of the year and increasingly linked with the focus on building the capacity of CSO partners to ensure their sustainability and continued contribution to the development of a dynamic, vibrant Palestinian civil society.

Result: Streamlined management system, improved integration of tasks, clarified responsibilities.

Responsibility: COP.

Timing: First and second quarters.

A1. Staffing and Staff Development

Staffing. In December 2003, Tamkeen hired a new receptionist/administrative assistant to allow the current administrative/finance assistant, Mahmoud Musleh, to be promoted to the position of accountant. Shifting additional resources to the finance team allows more time for the senior financial officer to work directly with CSOs on compliance tasks, such as financial spot-checks and pre-award capacity assessments, while the accountant focuses on internal accounting financial operations. The accountant also assists with grant compliance tasks as delegated by the senior financial officer. In addition, Tamkeen may engage a finance and accounting specialist to support the needs of the Gaza team.

We will continue to review our staffing needs in 2004. Factors affecting staffing may include increased capacity-building needs of CSO partners, particularly new CSOs, after implementation of the ATC requirement and the loss of some larger, more experienced CSOs. Beyond this, we will supplement project resources with short-term assistance as needed, and continue to review our staffing throughout the year.

Staff development. To ensure consistent performance and improved morale, Tamkeen placed increased emphasis on staff development and training in 2003. Staff members were encouraged to view their jobs in a holistic manner within the context of contributing to the overall purpose of strengthening Palestinian civil society. We developed a new annual performance evaluation protocol to assist staff members in quantifying and qualifying their performance and contributions to the project. Since its introduction in early 2003, this tool has been successful in better monitoring performance, rewarding staff for excellent performance, and targeting training needs and requirements.

In parallel with the new evaluation tool, we introduced a comprehensive staff development and training policy encouraging staff members to take a proactive role in their own professional development while ensuring all efforts contribute to improving the project as a whole. In 2004, the directors will meet with their team members to develop individual performance plans for the year to complement the annual performance evaluation process. The director of finance and administration will develop an individual performance plan form for the project, based on models from the Chemonics home office.

Staff members will be encouraged to continuously assess their performance goals and to be proactive in identifying training opportunities (outside training, on-the-job training, mentoring) that benefit both their own professional development objectives and those of Tamkeen. As with our work with CSO partners, this approach aims to cultivate individual responsibility, initiative, and ownership of professional growth and contributions to Tamkeen's success.

Result: Better qualified and more effective staff and improved morale and direction.

Responsibility: FA, CSS, and PCIT sub-teams.

External resources: Chemonics home-office project management unit.

Timing: Starting in the first quarter and ongoing throughout the year.

A2. Office Administration and Logistical Support

Administrative systems, policies, and procedures. In 2003, Tamkeen worked to codify and strengthen administrative and financial systems to streamline functions and record-keeping between the two main offices and the three satellite offices, as well as strengthen adherence to contract regulations. This included development of a Local Personnel Policy Manual, a Tamkeen Operations Manual, and an Emergency Action, Evacuation, and Contingency Plan.

Administrative and financial systems were also harmonized with the Chemonics home office and subcontractors to ensure better field-home office coordination. We will continue to maintain and update these procedures, manuals, and systems throughout the year. The Chemonics home-office project management unit will work with Tamkeen field staff throughout 2004 to provide backstopping support and assist with quality assurance. The home-office project administrator is expected to conduct a field supervisory visit in mid-2004 to support this process. The project administrator will also assist with other financial and administrative training initiatives and grants compliance functions as needed.

Result: Continued clear, consistent, and contractually compliant operations.

Responsibility: FA sub-team, COP, and PMU.

External resources: Chemonics home-office project administrator.

Timing: Ongoing throughout the year.

IT infrastructure. Tamkeen already has excellent IT infrastructure that has proven able to provide consistent service for staff in all geographic locations. Our IT staff installed sufficient redundancy and remote-user solutions in anticipation of curfews and the Iraq war in 2003. They will ensure continued maintenance and upgrading of these systems to allow the project to operate at all times, even under the worst possible conditions.

Several additional upgrades to our systems are planned for 2004. These include installing better back-up connections between the Gaza and Ramallah offices and improved network security, which is particularly important now that Tamkeen is hosting the website and grants database locally.

Result: Continued Tamkeen operations in all situations.

Responsibility: PCIT sub-team.

Timing: Improved network security and back-up connections (first and second quarters).

A3. Improved Financial Management and Compliance With Contract Regulations

Contract and financial monitoring. In 2003, Tamkeen completed a restructuring and realignment of the contract budget, which collapsed the original four programmatic CLINs into two, resulting in a more streamlined and functional contract budget. Along with the

budget restructuring, all of the subcontracts and budgets were revised and updated to provide more coherent direction and cooperation between Chemonics and its partners.

These revitalized relationships and rationalized management tools will be maintained and closely monitored by the director of finance and administration, with assistance from the new Chemonics home-office project manager, Marilyn Tedeschi. Throughout the year, Ms. Tedeschi will be in close contact with the director of finance and administration and the chief of party to assist Tamkeen in maintaining its contractual and financial obligations to USAID. We expect that Ms. Tedeschi will assist with a field supervisory trip, combined with a possible coverage function if the chief of party and/or the director of finance and administration are on annual leave.

Result: Maintain improved contractual compliance.

Responsibility: FA sub-team, COP, and PMU.

External resources: Chemonics home-office project management unit.

Timing: Ongoing throughout the year.

Annual USAID audit. To provide adequate resources for the annual USAID/RIG audit of West Bank and Gaza programs, we feel it is important to assign an accountant/financial specialist to work closely with the auditors and minimize disruption of regular project activities. Based on our experience with the 2003 audit, we propose to have the Chemonics home-office field accountant responsible for Tamkeen fulfill this function. The field accountant will work with Tamkeen's senior financial officer during the audit—and throughout the year—to monitor the project's financial operations and provide assistance and training as needed.

Result: Adequate support for audit process with minimized disruption of project activities.

Responsibility: FA sub-team.

Additional resources: Chemonics home-office field accountant and/or project manager/project administrator.

Timing: Expected timing of audit: mid-summer 2004.

A4. Team Retreats

Tamkeen held an all-staff team-building and planning retreat in September 2003. The retreat kicked off our planning process for Year 4. It was also the first time in the life of the project that the entire team was able to meet since closures had prevented many staff members from traveling outside Gaza. In 2004, we intend to hold two additional retreats, one in the second quarter and another in the fourth quarter.

The first retreat will focus on team building and provide an opportunity to assess progress on Year 4 work to date, as well as make any necessary programmatic changes to ensure results

targets are met. The second retreat will again serve as a kick-off to work planning for the final year of the project.

Result: Improved team-building and better planning.

Responsibility: FA sub-team and COP.

Timing: First and fourth quarters.

B. Financial Management

B1. Continued Financial Monitoring of Contract Budget

In mid-2003, the contract budget was realigned to reduce the split of program funds from four CLINs to two (management and technical assistance/grants). This streamlined budget has relieved the management burden on Chemonics, our subcontractors, and USAID in allocating and reporting expenditures, and has allowed greater flexibility in expending funds in specific programmatic areas, such as capacity building, short-term consultants, and staff development.

Tamkeen will work closely with the Chemonics home-office project management unit to manage and monitor expenditures within the realigned budget structure. Our efforts will focus on the possible need for further realigning should it be required by changes in the grants program as a result of the ATC, such as the need to work with smaller CSOs and to provide increased capacity-building assistance to our partners. We will keep USAID apprised of any new developments and provide technical justifications as needed and required by U.S. government regulations.

Result: Better monitoring of financial planning of contract.

Responsibility: FA sub-team, COP, and PMU.

Timing: Ongoing throughout the year.

B2. Improved Financial Controls Over Grant Program Activities

Tamkeen has instituted more formal mechanisms for financial control and oversight to support adherence to the regulatory requirements of the USAID grants-under-contract mechanism, as well as strengthen our ability to provide comprehensive capacity-building support to CSO partners. These compliance elements and capacity-building activities are described in detail in Section II.

ANNEX A

Illustrative Timeline

Task Name	Team Resources	1st Quarter			2nd Quarter			3rd Quarter			4th Quarter		
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Supporting the Role of CSOs in Public Discourse		[Solid black bar spanning all 12 months]											
Grant Making		[Solid black bar spanning all 12 months]											
Solicitation Issued		[Solid black bar]											
D&G Solicitation Issued	CSS,FA, PCIT	[Blue hatched bar]											
APS Issued	CSS,FA, PCIT	[Blue hatched bar]											
Getting to Grants Workshops (1-4)	CSS,FA			[Blue hatched bar]									
Grants Committee Meetings (1-5)		[Blue vertical bar]			[Blue vertical bar]	[Blue vertical bar]	[Blue vertical bar]						
Pre-award Capability Assessment	FA,CSS	[Blue hatched bar]											
Grants Awarded		[Solid black bar spanning all 12 months]											
2003 Pipeline D&G and APS Grants Awarded		[Blue hatched bar]											
D&G Solicitation Grants Awarded					[Blue hatched bar]								
APS Solicitation Grants Awarded					[Blue hatched bar]								
Renewals	CSS,FA, PCIT	[Blue hatched bar]											
Programmatic FOGs	CSS,FA, PCIT	[Blue hatched bar]											
Compliance		[Solid black bar spanning all 12 months]											
Audits and Compliance Review	FA	[Solid black bar spanning all 12 months]											
OMB-A 133 Audit		[Blue hatched bar]											
Support CSOs in Financial Mgt		[Blue hatched bar]											
Increase the Capacity of CSOs to Implement Grants	CSS,FA	[Solid black bar spanning all 12 months]											
Improve Financial Capacity of CSOs	FA,CSS	[Blue hatched bar]											
Financial Management IT Support	FA,CSS,PCIT	[Blue hatched bar]											
Institutional Development of CSOs (1-3)	FA,CSS				[Blue vertical bar]		[Blue vertical bar]		[Blue vertical bar]				
Capacity Building and Technical Assistance		[Solid black bar spanning all 12 months]											

ANNEX A

Illustrative Timeline

Task Name	Team Resources	1st Quarter			2nd Quarter			3rd Quarter			4th Quarter		
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
IT Assistance to CSOs		[Thick black bar spanning all 12 months]											
Awarding 20 IT FOGS to Partner CSOs	PCIT,CSS	[Blue shaded bar spanning all 12 months]											
Workshop on IT					[Blue shaded bar from Apr to Jun]								
IT Course for Resource Persons			[Blue shaded bar from Feb to Jun]										
Capacity Building and Other TA	PCIT,CSS	[Thick black bar spanning all 12 months]											
Training Best Practices Program- AI and TBP	PCIT,CSS	[Blue shaded bar spanning all 12 months]											
Training in Advocacy Skills (phase 2)	PCIT,CSS				[Blue shaded bar from Apr to May]		[Arrow pointing to phase 3]						
Training in Advocacy Skills (phase 3)	PCIT,CSS							[Blue shaded bar from Jul to Sep]					
PONAT Introductory Workshops	PCIT,CSS,FA	[Blue shaded bar from Jan to Mar]											
Additional Capacity Building Initiatives	PCIT,CSS,FA							[Blue shaded bar from Jul to Dec]					
Communications & Outreach		[Thick black bar spanning all 12 months]											
Increase the Communication Capacity of CSOs				[Thick black bar from Mar to Dec]									
Networking Between CSOs and Media	PCIT,CSS			[Thick black bar from Mar to Dec]									
Roundtables (1-4)				[Blue square]			[Blue square]			[Blue square]			[Blue square]
Media list							[Blue square]						
Expert List													[Blue square]
Media Relation Skills of CSOs (1-4)	PCIT,CS			[Blue square]			[Blue square]			[Blue square]			[Blue square]
Training for Journalists	PCIT,CSS			[Thick black bar from Mar to Dec]									
Workshop for Journalists						[Blue shaded bar from Jun to Sep]							
Workshop on Election (TBD)													
CSO - Donor Roundtables	PCIT,CSS,FA										[Blue shaded bar from Oct to Dec]		
Grantee Conference	PCIT,CSS,FA							[Blue shaded bar from Jul to Sep]					
Increasing Awareness of Tamkeen		[Thick black bar spanning all 12 months]											

ANNEX A Illustrative Timeline

Task Name	Team Resources	1st Quarter			2nd Quarter			3rd Quarter			4th Quarter		
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maintain Tamkeen Website	PCIT,CSS,FA	[Blue shaded bar from Jan to Dec]											
Printed & Electronic Info on Tamkeen	PCIT,CSS,FA	[Black bar with arrowheads from Jan to Dec]											
Coordination Between Tamkeen & Other Projects	PCIT,CSS,FA	[Black bar with arrowheads from Jan to Nov]											
Other Meetings and Roundtables		[Blue shaded bar from Jan to Nov]											
Results Monitoring		[Black bar with arrowheads from Jan to Dec]											
Analysis of Data Generated by Y1 & Y2	PCIT,CSS,FA	[Blue shaded bar in Apr]											
Maintaining PMP Data	PCIT,CSS,FA	[Blue shaded bar from Jan to Dec]											
Continue Impact Assessment Program	PCIT,CSS,FA	[Black bar with arrowheads from Mar to Dec]											
IT Capacity Building Study		[Blue shaded bar from Mar to Jun]											
Additional Studies (Youth Participation, etc.)		[Blue shaded bar from Jul to Dec]											
Training in Results Monitoring for CSOs	PCIT,CSS	[Blue shaded bar from Apr to Sep]											
Overall Management		[Black bar with arrowheads from Jan to Dec]											
Streamlined Management System	COP	[Blue shaded bar from Jan to Jun]											
Staffing & Staff Development	FA,CSS,PCIT,HO	[Blue shaded bar from Jan to Dec]											
Office Admin and Logistical Support	FA,COP,PMU	[Black bar with arrowheads from Jan to Dec]											
Administrative Systems in Place		[Blue shaded bar from Jan to Dec]											
IT Infrastructure	PCIT	[Blue shaded bar from Jan to Jun]											
Improved Compliance	FA,COP,PMU	[Black bar with arrowheads from Jan to Dec]											
Contract and Financial Monitoring		[Blue shaded bar from Jan to Dec]											
Annual USAID Audit		[Blue shaded bar from Jun to Sep]											
Team Retreats (1-2)	FA,COP	[Black bar with arrowheads from Feb to Sep]											
Financial Management	FA,COP,PMU	[Black bar with arrowheads from Aug to Dec]											
Continued Financial Monitoring of Contract Budget		[Blue shaded bar from Sep to Dec]											