
Project Memos

Version 20.03

Project Memos are important documents sent from the Australian Mercy Board that help to explain our policies, procedures, and expectations. It is important that PMGs, AM Offices and projects familiarise themselves with all project memos that have been communicated by the Board.

In years past the Project Memos below have been sent out to all projects. The information in them is still relevant. Please make yourself familiar with their content.

As new Project Memos are sent out to projects and offices this page will be updated.

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Welfare and Development

Australian Mercy is an approved organization under the Overseas Aid Gift Deduction Scheme (OAGDS) in Australia. This means that donations to our approved projects are tax deductible.

There are rules and guidelines within the OAGDS that we need to abide by in order for our projects to remain tax deductible. This memo is specifically commenting on the issue of tax deductible funds being used for the purposes of welfare.

There are strict guidelines of how tax deductible funds can be used and although complicated the OAGDS Guidelines in Welfare based activities are clear.

The OAGDS defines welfare as;

Welfare activities are those which provide direct assistance to individuals because of a need. They generally seek to address immediate needs rather than address the root causes of those needs. The simplest way of understanding welfare is to imagine the delivery of a food package to a poor family. This type of assistance obviously alleviates the family's immediate need for food. It does not, however, change the long-term poverty situation of the family. While such forms of assistance can be very useful in some situations, they are not eligible under the OAGDS.

Common examples of welfare are the provision of food and clothing to poor communities, and support for school fees, books and uniforms for children. Other examples of welfare include provision of scholarships to school children; assistance to individuals such as institutionalized care programs provided by orphanages; child sponsorship (that is, funds given directly to children or their families, and not funds drawn from child sponsorship and used for development purposes); hospital care programs, hospices; and costs for the maintenance of structures for institutionalized care programs (for example, schools or orphanages).

Welfare activities are often very similar to gifts, as they are provided for or on behalf of beneficiaries, without a requirement for their participation in the activity or a requirement for the activity to be sustainable. An example might be the provision of a well or a classroom to a poor community, without significant involvement in its construction by the community and without any community plan to maintain the well or support a local teacher.

Welfare is also implemented independently of other sustainable community development activities. This means that the welfare activity, such as building a classroom, is a straightforward construction activity, without attention to training local people in construction techniques or training a local teacher to teach in the classroom. If there are other components that include and build the skills of local people, the activity would not just be considered welfare.

Welfare programs include no strategy for integration into broader, community development programs and are implemented on either a one-off 'gift' basis or on a long-term basis with no clear exit strategy.

Welfare is necessary in some situations. In a disaster for example, food, shelter medicine and clean water all may be provided as welfare within a refugee situation, however the long term needs of the people will be best served through sustainable development.

With the provision of welfare;

In disaster related projects after a continual assessment needs to be done to ascertain how long the welfare assistance will be needed for and when it can begin to transition to a sustainable developmental approach.

If welfare is being given out for a period greater than 6 months the situation should be assessed to ascertain a means of effective and efficient transition to a sustainable developmental model.

Certain situations will rely on constant welfare assistance for a long period of time; these are often defined as a Chronic Complex Emergencies.

Chronic complex emergencies are defined by persistent low-level armed conflict, a long-term disaster or high exposure to climate change, high regional poverty, and changing demographics between groups. These include high rates of migration, refugees, and internally displaced persons (IDPs) settled in camps. <https://www.strausscenter.org/ccaps-research/about.html>

Australian Mercy projects channeling funds into welfare related projects need to regularly assess the project and make the transition to a sustainable developmentally based model as soon as possible.

Religious Activities and Development

Australian Mercy is an approved organization under the Overseas Aid Gift Deduction Scheme (OAGDS) in Australia. This means that donations to our approved projects are tax deductible.

There are rules and guidelines within the OAGDS that we need to abide by in order for our projects to remain tax deductible. This memo is specifically commenting on the issue of tax deductible funds being used for the purposes of religious activities.

There are strict guidelines of how tax deductible funds can be used and although complicated the OAGDS Guidelines in Welfare, Politics and Religious Activities are clear.

The OAGDS defines religious / evangelistic / missionary activities as;

Evangelism (also called proselytism and missionary work) is the practice of attempting to convert people to another religion or faith. Though the words are of Christian origin they can also refer to attempts by other religions to convert people to their religion or faith.

Evangelistic activities may discriminate on the basis of belonging to a particular group or aim to persuade or develop religious beliefs and faith practices among project beneficiaries.

Tax deductible funds cannot be used for evangelistic purposes nor for missionary activities.

Missionary activities include evangelism but also extend to activities designed to build up the knowledge and faith of believers including theological training and training in and study of works of religious wisdom such as the Koran, Torah or Bible. The building and maintenance of places of worship are also ineligible.

Most of Australian Mercy's projects are overseen by Christians who have both the physical and spiritual welfare of the people at heart.

For Australian Mercy there are several no go areas for tax deductible funds that come under this heading.

The purchase / printing / distribution of Bibles or other religious material cannot be done with tax deductible funds.

This would so include the purchase or procurement of digital materials and the costs of establishing and maintaining religious websites and the like.

Funding for religious training classes, Pastor's conferences and the like are also ineligible.

A single purpose church building cannot be built with tax deductible funds from the OAGDS; however, a multipurpose building that a church might hire once a week along with other services such as a clinic, public hall, adult education or training center is more likely to qualify for tax deductibility.

A religious worker's salary cannot be paid for by tax deductible funds, however if a person is employed by a project as legitimate project staff their salary is tax deductible but any religious component needs to be paid for with non-tax deductible funds.

Australian Mercy projects are reminded that funds raised for religious activities must be non-tax deductible under the OAGDS and must appear as a separate line items in their accounting programs.

Political Activities

Australian Mercy is an approved organization under the Overseas Aid Gift Deduction Scheme (OAGDS) in Australia. This means that donations to our approved projects are tax deductible.

There are rules and guidelines within the OAGDS that we need to abide by in order for our projects to remain tax deductible. This memo is specifically commenting on the issue of tax deductible funds being used for the purposes of religious activities.

There are strict guidelines of how tax-deductible funds can be used and although complicated the OAGDS Guidelines in Political Activities are clear.

The OAGDS defines political activity as;

Partisan political activities include political, lobbying and advocacy activities, which are carried out for the sake of, or in aid of, a particular political party. An example of a partisan political activity would be an activity that urges voters to cast their ballots for a particular political party or candidate or specifically advocates a vote for a particular party.

Australian Mercy does not support any political party and asks members and staff to keep their political preferences and passions out of Australian Mercy's public persona.

The item does not mean that Australian Mercy and its staff cannot be involved in general advocacy on behalf of the poor and disenfranchised. We reserve the right to approach any politician, party, or government in order to seek assistance for the poor whom we are serving.

We will not;

- Publicly endorse a political party.
- Endorse the candidate of a political party.
- Allow a candidate or political party to use our name in order to win votes.

Should our staff be privately involved in a campaign they will not wear any clothing that will identify them as representing Australian Mercy.

No Australian Mercy funds whether sourced via the OAGDS or privately are to be used to fund any political campaign on any level of government.

Orphanages and Schools

Australian Mercy is an approved organization under the Overseas Aid Gift Deduction Scheme (OAGDS) in Australia. This means that donations to our approved projects are tax deductible.

There are rules and guidelines within the OAGDS that we need to abide by in order for our projects to remain tax deductible. This memo is specifically commenting on the issue of orphanages and schools.

Many of our projects are involved in the caring for or education of children.

Funds raised for these projects make up a substantial amount of our overall global budget. I wish to draw your attention to the most recent Overseas Aid Gift Deduction Scheme (OAGDS) Guidelines that relate to this matter.

In the case of schools and orphanages, activities such as the provision of textbooks, uniforms, food, school fees and construction activities are generally considered to be welfare activities.

Some organizations claim that the benefits of these activities lead to educated students, which in turn assists those students and their communities break their cycle of poverty. While this is a strong argument, it is critical that these activities are: provided in partnership with local community involvement; seek to build local capacity to meet local needs; and have an exit-strategy. A good example of an activity which would be eligible under OAGDS is the establishment of a local vegetable garden to produce food for an orphanage, rather than providing funds for the food on an ongoing basis.

This ensures that food is available over a period of time and is not dependent on ongoing welfare from external sources.

Similarly, the construction of classrooms in a school would be eligible under OAGDS if the activity trained local people in construction techniques, was supported by a local community maintenance plan and was linked to the training of teachers to staff the classrooms. The activity is therefore part of a larger development project.

As the OAGDS is what makes donations to our projects tax deductible therefore project needs to make sure that all facets of the project are moving towards sustainability and are in keeping with the guidelines.

With regards to your project;

- If building work is proposed, for it to be tax deductible the building must be part of a larger scheme that trains and mentors unemployed or disadvantaged people to be skilled in building to better help them get a job.
- Just paying contractors or using local or international volunteers without their being a training or mentoring program for a significant number of local unskilled people attached to the building project does not qualify to tax deductibility.
- A single purpose church building cannot be built with tax deductible funds from the OAGDS; however, a multipurpose building that a church might hire once a week along with other services such as a clinic, public hall, adult education or training center is more likely to qualify for tax deductibility.

- Where food programs are attached to a school or orphanage; significant effort needs to be made to establish sustainable programs that supplement the food program reducing the amount of tax deductible funds used in the provision of food. In other words, where possible food programs should be subsidized from other sources such as project owned and operated gardens, and the keeping of animals and domestic fowls etc. The establishment of these can be paid for with OAGDS funds but in most cases the continued supply food from commercial sources is not considered sustainable and cannot be paid for with tax deductible funds.

The Board of Australian Mercy is requesting that all projects look at these issues and where necessary make the required changes to their projects.

Counter Terrorism

Australian Mercy is an approved organization under the Overseas Aid Gift Deduction Scheme (OAGDS) in Australia. This means that donations to our approved projects are tax deductible.

There are rules and guidelines within the OAGDS that we need to abide by in order for our projects to remain tax deductible. This memo is specifically commenting on the issue of counter terrorism.

All projects as part of their agreement with Australian Mercy have agreed to regularly check for any links to terrorist activities through the project staff that they hire or the NGOs and businesses whom they work with or buy things from.

The OAGDS guidelines say;

The organization must demonstrate that it is aware of terrorism related issues and uses its best endeavors to ensure that its funds do not provide direct or indirect support or resources to organization's or individuals associated with terrorism.

Refer to the following information: International Counter-Terrorism (DFAT)

<http://www.dfat.gov.au/issues/terrorism.html>

Projects who are part of Australian Mercy are reminded that it is their responsibility to do an annual terrorism check on staff, associates, NGOs and business that they are working with by checking names of people and organizations against these websites;

<http://www.nationalsecurity.gov.au/Listedterroristorganisations/Pages/default.aspx>

<http://www.dfat.gov.au/sanctions/consolidated-list.html>

If a name of a person or organization is found on either of these sites; the project must immediately inform the Australian Mercy National Office in Australia and make immediate plans to immediately disassociate themselves from that person(s), business or organization.

Child Protection

Australian Mercy is an approved organization under the Overseas Aid Gift Deduction Scheme (OAGDS) in Australia. This means that donations to our approved projects are tax deductible.

There are rules and guidelines within the OAGDS that we need to abide by in order for our projects to remain tax deductible. This memo is specifically commenting on the issue of child protection.

Child protection is not just about looking after children who are in our permanent or temporary care; it is about making a project site safe for children to visit; whether the project is child focused or not. Therefore child protection policy is relevant to every Australian Mercy project.

The OAGDS guidelines say;

The organization must demonstrate that it has procedures in place to ensure children are protected from abuse, neglect and exploitation. It must be aware of child sex tourism issues and use its best endeavors to ensure that its funds do not provide direct or indirect support or resources to organizations or individuals associated with child sex tourism.

The organization must also use its best endeavors to ensure that no support is given to any individual who has a conviction under the Crimes (Child Sex Tourism) Amendment Act 1994. This may mean ensuring that staff, volunteers, and contractors who have access to information about or physical access to children involved in projects supported by the organization, sign a declaration that they do not have any criminal record in relation to child abuse, neglect or exploitation. It may also mean that proposed projects are assessed for their potential risk to children to ensure that children are not made more vulnerable to abuse and exploitation.

Refer to the following information: Child Protection Policy (DFAT) <http://aid.dfat.gov.au/Publications/Pages/child-protection-policy.aspx>

Australian Mercy has several protocols in place with regards to Child Protection.

- Each project must ensure that staff and volunteers know what child protection procedures are in place and how to access a written copy if they are unsure what the policy is.
- Must make sure child protection training is run on their site at least once every two years.
- Must make sure all volunteer visitors have been familiarized with Australian Mercy's child protection policies and procedures before they start working on site.
- Know how to report an incident to local authorities if it ever happens.
- Must report all suspected cases of child abuse, sexual abuse, sexual harassment to the Australian National Office of Australian Mercy.

The importance of project evaluation

Constant evaluation helps us to make sure that we are on course with our project values and objectives. In the course of any 12 month period it is possible that a project may have evaluated itself several times either in part or as a whole and made changes to its project proposal accordingly. Constant monitoring and evaluation help us to obtain the best results!

ACFID have released a new Code of Conduct and as part of that code yearly evaluation will be necessary to gauge and monitor the effectiveness of the development that is being done in-country. This is good common sense as it forces us to think about what we are doing.

In order to cover this part of the code we are introducing a new part of the 6 monthly reporting that will ask for you to evaluate your project in the first six month report of the calendar year. Kind of like a New Year's resolution".

Take some time with your leadership group and look at your project. Read through the Project Proposal and on the basis of the needs that you trying to address in your project proposal ask yourself some review questions;

- Does our present course bring about the best result? If no what changes do we need to make?
- Are there any improvements that we can make that will ensure better outcomes? If yes, how can we best do this?
- Are we spending our money wisely, are there ways we can be more cost effective?
- How can we be more inclusive of local people in the decisions made by the project leaders?
- Is our project safe for children, for women, for outsiders who are visiting our project site?

Minute the meeting and keep a record of the changes that you are going to make as a result of your project review.

This process should be completed by June 30 and will be added to your annual report.

All projects will need to include a statement of evaluation in their Annual report based on the review that has happened in the first half of the calendar year.

Volunteer Hour Estimates and why we disclose them.

Background

In September 2011, The Australian Standards Accounting Board decided that; all NFPs (Not for Profits); whether in the private or public sector, should: (i) be required to make disclosures about the nature and significance of donated services received, whether recognized or unrecognized; and (ii) in principle, be required to recognize donated services received at fair value, when fair value can be measured reliably;

http://www.aasb.gov.au/admin/file/content102/c3/Minutes_unsigned_7-8_Sept_2011.pdf (Page 6)

This concept has been further developed by DFAT's Aid arm (formerly known as AusAID) and has been inserted into the ACFID Code of Conduct guidance documents.

In late 2013 Australian Mercy received news that ACFID wanted to require that the recognition and disclosure of contributed services (volunteer hours) should eventually become a line item requirement in our annual audit. Australian Mercy wrote to ACFID saying that although we were willing to include an estimate of our volunteer hours in the notes of the audit, we thought that making them a line item would be both onerous and dangerous.

We are still having a conversation with ACFID about this matter.

Australian Mercy's position

We believe that all line items in an audit must be accurate; estimates are not good enough when you are calculating your organization's income. If we were to present an audit that was based on estimates the tax office would certainly take issue with us and require accurate figures be presented.

In order to give an accurate statement of volunteer hours that could be used as a line item in an audit, every volunteer hour would need to be accounted for in the same way that every dollar that is donated and expended is accounted for. Our organization receipts every dollar of its income, and carefully watched over every dollar expended. Receipts are written and proof of expenditure are gathered and submitted to our auditor every year to show that we have financial integrity.

If volunteer hours were to be given a dollar value and become a line item in our annual audit; then a similar system of accounting for each hour that each volunteer gives us should be in put in place. Volunteer hours are valued by DFAT who put out a new valuation every few years. The current valuation can be found on page 10 of this document.

https://dfat.gov.au/about-us/publications/Documents/rde_notes.pdf

According to this document the lowest recognized level of volunteer time is valued at \$43,368 per year (based on a 48 week year); this breaks down to 22.40 per hour.

If we agree that every amount of money that an organization receives need to be accurately receipted then how can we accurately receipt, volunteer hours? If we have sign sheets and the person forgets to sign in then for hour they work we have \$22.40 of unreceipted funds. It is our view that keeping an accurate accounting of volunteer hours will be onerous and hard to do. The safest thing we can do is to treat volunteer time as an estimate.

The danger we allude to in this matter has to do with how the Australian Tax Office understands *gifts in kind*. If a surgeon gives 100 hours of their time to our organization the DFAT document estimates that their time at \$60.24 per hour, hence their donated time has a value of \$6,024.00 can the surgeon ask our organization for issue a tax deductible receipt for a gift in kind valued at that same amount? If this were the case then further burden would be put on our accounting, and we are unsure as to how the Australian Tax Office would view the matter.

An estimate recognizes the value of the time given without putting a concrete value on the gift that would give rise to a claim that may see the ATO take action against the organization and the donor.

In 2014 our estimated volunteer hours were valued at more than \$7 million. In 2015 the amount will be a similar figure. Hence each year the ATO could lose more than \$7million per year in taxable income from just the time donated by one not for profit. There are hundreds more just like us who have many volunteers who help them every day.

We have told ACFID that we will include our volunteer estimates as a note to the audit but for the reasons stated above we feel that it would not be in our best interest to include them as a line item in our audited accounts.

How we calculate volunteer hours

Australian Mercy uses the DFAT document referred to above to calculate the value of its volunteer hours. This document gives a pay range for each identified designation. Project Assistant which is the bottom entry position has a pay scale of \$43,368 – \$47,364.

Australian Mercy highly values its volunteer workforce but at the same time does not want to risk inadvertently overstating its financial position in audit of accounts; therefore in calculating the value of volunteers we have chosen to use the lower end of the DFAT scale when calculating the monetary value of volunteer labour. In this case we calculate a Project Assistant at a pay rate of \$43,368.

A statement on the value of volunteer's contribution is found in the Auditors Notes to the Financial Statements and reads:

*Non-monetary items Non-monetary items arising from the work of volunteers in the Australian offices and the overseas projects constitute a significant value to the organisation. The current policy of the company is such that the value of these non-monetary items is not recognised in the company's accounts. However, the directors have calculated the value of the non-monetary volunteer work to be \$ ***** for the year ended ******

How we ask our projects and offices to report their volunteer hours

There are two ways that projects and offices can report their volunteer hours. Firstly they can include it as part of their 6 monthly reporting. There is a section in the 6 monthly report dedicated to this. Secondly they can fill out the templated tool that we have sent them and lodge it with the AM National Office at the end of the financial year.

Because we only seek an estimate we understand that sometimes some volunteer hours may be forgotten and thus not included we understand that we are dealing with approximate figures and are comfortable to use them.

It is our hope that as projects and offices become more used to dealing with this requirement that their ability to keep more accurate records will improve each year.

Volunteer visits to project sites.

Volunteer support and participation are essential to our project successes. Volunteers provide a source of skilled and unskilled labour that should enhance the goals and the aims of each project.

Volunteers though need to be managed and need to be vetted in order to make sure that only people of suitable character to actually participate on our project sites. Our project clientele need to be protected at every level. Therefore the Australian Mercy Board is making sure that every project has in place a suitable mechanism through which it vets potential project volunteers.

In some cases this vetting can be done by the Australia Mercy National Office. If the volunteers are sourced in Australia and are in contact with the National Office then we take them through a thorough application process, which includes;

- a police check,
- submission and processing of a volunteer application form,
- familiarization with minimum standards required by Australian Mercy of its volunteers
- signing of a Volunteer Code of Conduct.

The National Office requires that this process be completed before any volunteer even buys their ticket to go to a project site.

(Copies of the documents used in this process are available on the Australian Mercy Project Portal).

However some volunteers make contact directly with the project and the Australian National Office are unaware of their intention to volunteer at a project site.

In such cases it is the responsibility of the project management to make sure that all volunteers no matter if they are sourced for Australia or elsewhere, go through an equally rigorous process to make sure that they are safe to work on a project site. It does not matter how well you know a prospective volunteer – all prospective volunteers need to go through the process.

Spontaneous Volunteers

A spontaneous volunteer is someone who just turns up to a project site and wants to help out. The Australian Mercy Board strongly opposes the use of spontaneous volunteers on its project sites. All volunteers must go through the application process and be approved.

In a disaster context spontaneous volunteers may in fact offer a valuable service and even save lives as they run to aid of those caught up in an accident or disaster situation or pull victims out of a burning building etc. These spontaneous volunteers may only have an involvement of a couple of hours in a crisis and in this context need to be treated differently to spontaneous volunteers who turn up at a project site with the expectation that their services will be needed.

On its not for profit website the Victorian Government has this to say;

Are we liable for the actions of 'spontaneous volunteers', for example, people who turn up to an event and just start helping out?

There is no legal definition of a 'volunteer' – some organizations have a structured volunteering program, while others engage with members of the community in an ad hoc way when they offer

to help out at an event or activity. An organization with a formal relationship with its volunteers through a structured volunteer program, for example, may more likely to be considered legally responsible if one of its volunteers sexually harasses or discriminates against another person.

Where a volunteer-involving organization allows a person to provide a service on its behalf, it may be liable if that volunteer discriminates against another person while providing that service. This will depend on the circumstances, but letting someone help out can be a sufficient connection to your organization for you to be liable for their behavior. Consider how you may have 'authorized' their participation – for example, by not stopping them from doing certain activities. You don't need to have an ongoing relationship with them to be liable for their behavior.

<http://www.nfpcompliance.vic.gov.au/common-questions/managing-volunteers/are-we-liable-for-the-actions-of-spontaneous-volunteers,-for-example,-people-who-turn-up-to-an-event-and-just-start-helping-out>

It is precisely for this reason that we strenuously oppose the use of spontaneous volunteers.

All volunteers who are working with children or on sites where there is likely to be contact with children must have some on site familiarization with the Australian Mercy child protection guidelines. Volunteers working with children need to be responsible to someone for their behavior.

Volunteers should not be left to their own devices but should be properly supervised.

The importance of child protection.

Child protection is a very serious issue. In Australia, the Royal Commission into the Institutional responses to child sexual abuse, <https://www.childabuseroyalcommission.gov.au/> has uncovered a plethora of abuse inside the church that has been carried out by people who were trusted by the Church authorities to care for those who were entrusted to it.

Many cases have been reviewed and charges laid, in the community there is considerable anger that instead of meeting the issue of the abuse head on, the Church covered it up and the culprits were moved on only to offend again. This Royal Commission will have a far reaching effect on public policy for decades after it is wound up.

I would encourage you to go to the site and read some of the testimony that has been given, it is of grievous to say the least.

Like the Church of decades ago our organization runs on trust, but trust alone is not enough what the Royal Commission clearly is telling us is that organizational policy and zero tolerance of sexual abuse also need to be in place and everyone needs to be trained. This is what is expected as a basic duty of care for the people who are in our care.

Some projects have not seen this as a priority issue because they do not have an emphasis on children, however it is not whether or not you have an emphasis on children that is the issue, it is are any children who visit your project site going to be safe? If a mother bring her 4 year old into your office, are you staff trained to make sure that the child is protected whilst they are there.

Currently in Australia no Government or Non government grant can be applied for unless the organization can demonstrate that it has a clear child protection in place and functioning.

It is for this reason that that Australian Mercy Board wants all projects to regularly provide child protection training to all of their staff and volunteers.

Effective Training

Child protection training need to be more than reading a pamphlet, it need to be thorough and cover areas such as improper touching, bullying, verbal abuse, photography, improper joking to name a few.

Sometimes people have the training but they still do dumb stuff. Recently we had a instance of sexual harassment occur on a project site by a volunteer. This matter took us nearly two years to resolve. The offender had undergone training in their denomination but had failed to put it into practice.

It is not enough to offer training once, or get people to read a pamphlet; training must be regular and policies with regards to the protection of children must become part of the values on which every project runs. Visual reminders such as posters on projects sites would also be appropriate.

Zero Tolerance

Our zero tolerance of sexual abuse and sexual harassment must be transparent, no cover ups. If there are local laws that need to be obeyed we obey them, if we are obliged to report matters we

report them. If the person faces court in the country of operation then that is a consequence of their action that we make no apology for.

In Australia there are also consequences local police need to be informed of all cases of sexual abuse that occur on Australian sites; however, they may need to be informed of sexual abuse that happens overseas even if the person has face court in the country where the offence took place. They may face other charges here and have their names placed on the sex offenders register.

It is not enough for us to give mental acent to this issue it must become a value on all of our project sites. The most recent policies for child protection are available in the Project Portalr. These polcies are always under review, so check them regualry.

What to do.

- Check the Project Portal website
- Download the Latest Policy and Procedures manual and access the
Child protection policies.
Images and messages statement.
Any othe relevant policies and procedures found in the document.
- Make yourself familiar with these documents.
- Download any training helps
- Put together a training course for your project site that you can offer twice a year to your staff.
- Familairize yourself with local laws and reponsibiities you mayhave in the country your project operates.
- Talk to the Australian Mercy head office if you have any concerns about child protection.
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So in the short term;

- review the Australian Mercy volunteer documents
- make sure your project has a stringent volunteer process in place
- do not accept spontaneous volunteers
- make sure all volunteers are properly supervised
- talk to the Australian Mercy National Office if you have issues regarding volunteers.

Projects taking on loans

Recent events have highlighted the Australian Mercy Board's need to clarify our policy in regard to all Australian Mercy Projects entering into loan agreements.

By Loans we mean;

- A loan may be in the form of monies or items of financial value. Items like but not limited to cars, computers, or cash etc.
- Any loan agreement with a registered financial institution, including but not limited to credit cards over draft arrangements, and other lines of credit.
- Any form of loan from a separate legal entity.
- Any loan given by a person, family or family trust that are not a registered financial institution or legal entity.

Projects that are not registered as their own legal entity, either in Australia or internationally, come under the legal entity of Australian Mercy. Therefore:

- All loans being applied for, or negotiated above \$1,000 AUD require Australian Mercy Board approval.
- Loans under \$1,000 do not require board approval but must still be included in the financial reports for the project and itemised accordingly in their chart of accounts.

All loan agreements must include the following:

- The purpose of the loan
- The amount being loaned and the associated fees and interest charges.
- The time frame of the loan
- Repayment schedule
- A default clause

Copies of both the loan documents and the variation agreements must be sent to the National Office of Australian Mercy within 7 days of their signing.

Projects that are registered as their own legal entity, either in Australia or Internationally, must apply the following:

All loans being applied for or negotiated above \$1,000 AUD must have approval from the project's legal board.

All loans must be included in the financial reports for the project and itemised accordingly in their chart of accounts.

Australian Mercy accepts no liability for any such loans.

Evaluating your project

All the projects that are part of Australian Mercy are striving to bring change into the lives and circumstances of people and communities who are suffering in some way.

All change is measurable, otherwise it is not change! So we need to look at our programs and measure the changes that are happening so that we can better understand our progress and effectiveness.

Project evaluation is vital for the good project outcomes. In some sense we are evaluating things as we go but not all that evaluation is done in a team setting or formalised in any way; it is just part of the day to day decision making.

Formal project evaluations need to happen at least annually. Data needs to be collected and analysed and any adjustments to the project made on the basis of the formal evaluation process.

Program effectiveness needs to be based on the review of program objectives and actual practices. This process needs to be carried out by the project leadership team.

Defining Objectives – Of course, everyone wants to know how to measure outcomes of a program. But, before you can look at the outcomes you have to first analyse your goals and objectives. **(These are stated in your project proposal.)**

Program objectives need to be specific and measurable if the objectives in your project proposal are not specific enough to be measured then you need to restate them so that can be measured.

Measurable objectives help us to measure progress. Here are two examples of possible project objectives.

- *Example 1: To provide health care to village families.*
- *Example 2: To provide health care to the 100 families living in XYZ village*
- *Example 3: To provide health care to all families living in XYZ village.*

Only examples 2 and 3 are measurable.

We need to make sure that our objectives are measurable so that we can chart our progress and tailor our project to the target group that we are trying to reach.

Some program objectives can be qualitative, but donors / funders will also want to see quantitative measures, so you should make sure to focus on these as well.

When thinking about measuring effectiveness your project will have to make sure that you are asking the right questions. Here are a few suggestions to get you going.

Has the project been running in keeping with its goals and objectives? If no why not?

What do we need to do to get the project back on track – or do we need to adjust the objective?

Looking at our project objectives, are they as relevant now as they were when we started the project? Do we need to adjust them?

Looking at each objective separately;

- On a scale of 1 -10 are we achieving that objective?
- Are there any changes we need to make in order to improve the effectiveness of that objective?
- Do we need to change the objective?
- If we have failed to meet an objective – why – how do we fix this problem?

Measuring effectiveness is not just based on opinion you may need to collect some data.

Data Collection – Once you know what questions you are trying to answer, then you can focus on what data you will need in order to answer them. Making sure you have the right system set up for collecting this data and making sure that any case workers or other staff members who will be inputting data understand the larger picture is also an important step in this process.

For instance; one of your questions might have to do with staff morale. It might be that flaws in staff morale are evident unless staff is first given a questionnaire to fill out that helps them to express any concerns or frustrations that they are experiencing. The questionnaire in this case provides you the data.

Data Analysis – After you know what data you need, you have to figure out what to do with it. This where you attempt to take the information you collect in step two and apply it to the objectives you set in step one. This is where a good software solution can really come in handy.

Data Evaluation – Last but not least, you can't just decide how to measure outcomes of a program and then walk away. Outcomes management systems need to be evaluated regularly, generally on an annual basis to make sure they are still serving the needs of the organization and any donors / funders on the particular program or project.

Data evaluation should lead to decisions that can affect the outcomes of the project.

The new ACFID code of Conduct requires all signatory NGOs to have a process of evaluation in place that shows that each project is undergoing a process of annual evaluation at the project level.

Therefore from January 1, 2018 all Australian Mercy project will be asked to include an annual evaluation statement in their Annual Report.

We are asking projects to begin their project evaluation in the January and to have completed the process by no later than June 30, so that it can be reported in the Annual Report for that year. Details of the evaluation will also be reported in the 6 monthly report for January 1 – June 30.

Formalised project evaluation will help us to have better focussed and more effective project outcomes.

Sexual misconduct in the development setting

Australia has some of the best policy in these areas and ACFIDS Code of Conduct has set standards that Australian organizations such as Australian Mercy must comply with.

Australian Mercy's position

The Board of Australian Mercy wants to restate that we have a zero tolerance of sexual misconduct in our offices and project sites. We remind our managers and staff that;

It is the obligation and responsibility of every person to ensure that their working environment is free from bullying and other unacceptable behaviours (including sexual harassment, and misconduct). The responsibility lies with every manager/supervisor and staff member and other volunteers to ensure that bullying and other unacceptable behaviours do not occur in the workplace. (Australian Mercy Policy Manual)

We urge all projects to make sure that all staff are familiar with our policies and procedures for sexual abuse and harassment which are listed in our policy manual under *Bullying and Other Unacceptable Behaviours Policy*

The Australian Mercy Board is to be informed of every occurrence of sexual misconduct in any of its offices or projects. These matters will be dealt with according to our policy and where necessary the matters will be reported to the police for full investigation.

Background

Sexual misconduct in any setting is abhorrent and wrong. More so, we who work in a development setting are working with vulnerable people who in some cases are recovering from some of the worst experiences of their life. To be involved in a sexual relationship with those who are supposed to be helping them in their time of vulnerability is the last thing that their recovery needs.

Sexual misconduct in Haiti

News items about the staff of Oxfam Great Britain being involved in sexual misconduct in Haiti, the Sudan and other places made world headlines in February 2018.

<https://www.news.com.au/finance/work/leaders/oxfam-scandal-highlights-the-sexually-charged-atmosphere-that-can-exist-among-aid-workers/news-story/825b91460a0d3ca7e6c54bc1528890d6>

As a result Oxfam GB was banned from working in Haiti ever again. Donors and ambassadors deserted it and even after it apologized for its actions Oxfam has found it hard to undo the damage done to its reputation.

<https://www.telegraph.co.uk/news/2018/06/14/oxfam-great-britain-permanently-banned-operating-haiti-sex-scandal/>

At the centre of some of the accusations were confirmed reports that in Haiti the NGO's then-country director, had admitted paying for sex and that three staff members had physically threatened a witness.

No details were released about those Haitians who were directly or indirectly hurt by the scandal.

East Timor

This is not the first time that NGOs have been involved in the sexual exploitation of women in a development setting. In 2003 and later in 2007 United Nations staff were caught openly frequenting brothels in East Timor (Timor Leste), despite the UN having a zero tolerance of such behaviour.

<https://www.theage.com.au/world/un-turns-blind-eye-to-use-of-timor-brothels-20070507-ge4two.html>

ACFID report

These actions though they occurred outside Australia caused the Australian Council For International Development (ACFID); the peak body to whom Australian Mercy belongs to seek a report into vulnerabilities in NGO's within Australia being caught up in similar instances. The interim report has been released and points to risks that currently exist amongst Australian NGOs.

<https://www.theguardian.com/australia-news/2018/aug/09/clear-risk-factors-for-sexual-misconduct-identified-in-australian-aid-sector>

Any questions about this document should be directed to the National Office.

First Aid requirements in offices and on Project sites

Background

Staff safety and welfare is extremely important to the Board of Australian Mercy. Our volunteers and staff are our greatest asset it is imperative that their welfare be maintained through the provision of safe work places and good mitigation procedures that reduce the possibility of serious accident outcomes. One of the ways we seek to reduce such outcomes is through the provision of a qualified on-site first aid officer on all of our project and office sites.

In this memo the Australian Mercy Board seeks to outline the minimum standards for the appointment of first aid officers.

As well as reading this memo all project and office sites should familiarise themselves with the First Aid policy and First Aid procedures that are outlined on our policy manual.

Appointment of First Aid officers (FAO)

The Australian Mercy Board recognises that on some sites trained medical staff already exist. If a person is a *registered nurse or medical practitioner and they are willing and able to accept the responsibilities of being a first aid officer then they can certainly function in that position. However if a person is not a registered medical worker then they should undergo first aid training and not rely on training that may be outdated.

Minimum standards for FAOs in Australia

The minimum standard of first aid training required on Australian sites is a senior first aid certification that has been granted by St Johns' Ambulance, the Red Cross or other equivalent registered training provider. This certification needs to be current and renewed as required so that the first aid officer's skills remain current.

It is recommended that the cost of training a first aid officer and First Aid supplies should be borne by the relevant office or project site. It may be that multiple first aiders need to be trained in order to meet the needs of some projects sites. Please see the policy and procedures manual for suggested First Aid Kit supplies

FAOs on overseas sites

With project sites outside of Australia it may not be possible to send the first aid officer to a registered in-country first aid training course. In such cases the first aid officer should be seen to actively educate themselves in manners such as;

- receive training from a local hospital or medic,
- train via online resources
- read other first aid manuals and books that may be available.
- familiarise themselves with first aid procedures at other locations

Their ongoing personal development in this area is essential.

The training of the first aid officer and provision of relevant first aid materials is the direct responsibility of the site manager.

Under no circumstances should an untrained or unqualified person be appointed to the position of first aid officer. Such an appointment may put the lives of our staff, clients, volunteers, on site contractors and visitors at unnecessary risk.

Questions about this issue can be directed to the National Office.

**AHPRA or equivalent registration is essential. See documentation on Medical staff and volunteer.*

Medical Volunteers serving with Australian Mercy.

We are grateful to partner with you in your area of devotion and we recognise your desire to deliver the best standard of services possible to the people we seek to serve.

In recent years the Board of Australian Mercy has reviewed and affirmed its volunteer application processes of which every office and project should be utilising.

Our Volunteer policy and procedures are clearly laid out in our Policy manual. Application forms and information that you can utilise with your volunteer processes are available as well.

Download the Volunteers application pack [here](#) (including Medical Volunteer documentation)

Download the Policy and procedures manual [here](#)

I would like to share some thoughts with you regarding in particular, Medical Volunteers;

When processing Medical volunteers additional checks and steps are necessary.

The purpose of these extra processes is to make sure our medical practices are legal and ethical and that all our project clients receive the highest possible standards of medical care with the minimum of risk. We do not want people's well-being jeopardized by under qualified people offering medical care for which they are not adequately trained.

The Australian Health Practitioner Regulation Agency, (AHPRA) is the key government agency that has responsibility to make sure that state and federal agreements on these medical matters are enforced. www.ahpra.gov.au

As part of this process AHPRA have set up a series of specialist Boards that oversee the regulation and practice of each main area of health practice; also certain titles have now become protected by law so that a person cannot claim to be a practitioner of a protected title unless they are first registered with and authorized by AHPRA. Penalties apply for people who falsely use these protected titles.

To be in any kind of medical practitioner in Australia a person must first be AHPRA registered.

Should caregivers give medical care for which they are not registered with AHPRA or call themselves by a protected title such as Doctor, Nurse, Paramedic, Optometrist etc without first having the appropriate AHPRA registration they can be fined and in some cases jailed. Any organization that was found to be complicit in such a breach can also face hefty penalties. <http://www.ahpra.gov.au/Publications/Tribunal-Decisions.aspx>

The Australian Mercy Board requires all personnel and volunteers who wish to practice their medical profession under the auspices of Australian Mercy to declare their AHPRA registration as part of their staff or volunteer process; which the receiving office must validate on the AHPRA website before their application is finalised.

A video explaining the need for AHPRA registration is available [here](#)

There are also a processes outlined in the volunteer application documentation for medical personnel whose registration is in another country.

Every medical volunteer must have their medical registration checked against their home country registration authority before they can medically practice with any Australian Mercy office or project.

Please read the relevant parts of the policy manual, the volunteer documentation and look at the explanatory video.

If you have any questions about Medical volunteer registration please contact the Australian Mercy National Office.

Dealing with outbreaks of Coronavirus* (and other viruses).

**This project memo has been written in the context of the 2019/2020 COVID 19 outbreak. So it references that virus all the way through. However, the matters discussed in the project memo should also apply to other future coronavirus outbreaks.*

Background

We all have colds or the flu from time to time and in flu season we must take precautions to manage the flu in our homes and work places. However, if there is an epidemic in our area extra steps must be taken in order to manage the risks presented by viruses, especially the coronaviruses.

Coronavirus is not a single virus but a family of viruses, such as Severe Acute Respiratory Syndrome (SARS), Middle East Respiratory Syndrome (MERS) and more recently COVID 19. Coronaviruses are *zoonotic* meaning that they originated in animals and transferred over to humans. SARS came from civet cats, MERS from camels and it is thought that COVID 19 has come from bats.

Viruses have the ability to replicate once they are inside the human body. They do this by getting inside a cell in the human body and using that cell to replicate itself. SARS, MERS and COVID 19 cause respiratory disease and want to make their way into your lungs.

How we catch viruses

Viruses are spread in numbers ways. Firstly, we can breathe in infected droplets if an infected person has sneezed or coughed near to us.

We can also pick up the virus by touching an infected surface, like a table, bench or a door handle. The virus transfers onto our hands and the next time we touch our face it transfers to our face and waits to be breathed in.

Viruses can also be found in food that has been prepared by and infected person, or on plates, cups and cutlery that has come in contact with the virus.

Epidemics and pandemics

When a disease becomes prevalent over a wide area it can be declared an *epidemic*. If the spread of that disease escalates further, to include an even wider geographical area and a significant portion of the population becomes affected it can be declared a pandemic. However, the World Health Organization have a specific definition of Pandemic that says *a pandemic is declared when a new disease for which people do not have immunity spreads around the world beyond expectations*. When the WHO declare a Pandemic this is what they mean. Each country should have health protocols in place should epidemic or pandemics be declared within their borders.

Australian Mercy projects should be familiar with these protocols before an epidemic/pandemic is declared. <https://www.who.int/emergencies/diseases/managing-epidemics-interactive.pdf>

Also you can sign up for the WHO free online training <https://openwho.org/> there are courses covering COVID 19 and other epidemic and pandemic diseases

Who is at risk?

Everyone is at risk from a virus but people who are in older age groups (above 60 years), people who are immunocompromised (they have weakened immune systems) and young children are especially at risk.

Symptoms

COVID 19's symptoms are very flulike. Symptoms can range from mild illness to pneumonia. Some people will recover easily, and others may get very sick very quickly. People with coronavirus may experience:

- fever
- flu-like symptoms such as coughing, sore throat and fatigue
- shortness of breath
- In serious cases it causes fluid to accumulate in the lower lungs and without medical help the person will probably die. A video on symptoms can be found here <https://youtu.be/vpALWJBQqzM>

Preventing the spread of a virus

To prevent the spread of a virus we must take deliberate steps to stop the disease from getting into the environment around us. This will mean hard work, but it must be done.

With regards to the fighting the coronaviruses the World Health Organization recommends that;

- Hands are washed regularly with soap and water
- Surfaces are regularly wiped down with anti-bacterial agents
- People learn not to touch their faces
- Coughing and sneezing is done into the elbow or shoulder not into the main room.
- People are tested for the disease and if they have it they are isolated for 14 days.
- Public gatherings and travel be limited.

Handwashing/sanitizing

Handwashing needs to be regular and with soap. The temperature of the water is not important but washing our hands with soap in the correct way for at least 40 seconds is.

The WHO have a short video about this which can be found here

<https://www.youtube.com/watch?v=lisgnbMfKvI&t=21s>

They also have a printable poster which can be found here;

https://www.who.int/gpsc/5may/How_To_HandWash_Poster.pdf?ua=1

All staff should be made aware of basic hand hygiene practices, not just after using the toilet, but at other times when they may have come into contact with infected surfaces.

If paper towels are not available for them to use then cloth towels should be made available and changed regularly. Hand sanitizers are great to use if water and soap are not available. Research shows that soap and water does the best job of cleaning germs from hands. The soap does not have to be medicated, any soap will do.

Wiping down surfaces

Desks, counters, tables, doors, chairs are all surfaces that can come in contact with viruses.

Researchers at the University of Bristol found that the average sneeze or cough can send 100,000 contagious germs at airspeeds of 100km per hour. One sneeze can travel up to 10 meters from the sneezer.

Coughing and sneezing can affect every surface within 10 meters of the sneezer. Tables, chairs, computers, phones everything. All those surfaces can become infected with whatever viruses or contagious germs the person sneezing is carrying.

Infected hands will infect the surfaces they touch. It goes without saying that all surfaces need to be wiped regularly, not just once a day.

Touching faces

Everyone touches their face, to scratch, rub their chin, to put on makeup, to eat, etc. If you know that you are going to touch your face wash your hands first. Infected hands touching your face will spread the germs. If you have scratch use a clean tissue to do it not unwashed hands.

Try and train yourself to touch your face less during the day. Some research show that people working in an office can touch their faces more than 60 times in one hour.

Coughing and sneezing safely

When we sneeze mucus and saliva is ejected out of our mouths at a very fast speed. If we are sick that mucus and saliva is laden with germs. We said before that a sneeze can infect an area of 10 meters. If you sneeze or cough into your arm or elbow the area effected by that sneeze is greatly reduced. You can also sneeze into a tissue in your hands but please get rid of the tissue safely and wash your hands.

In order to combat viral infections we need to train ourselves and our staff to learn how to sneeze and cough safely. Remember, if you are coughing into your clothes change your clothes and wash them thoroughly before wearing them again.

A short video on how to sneeze safely can be found here.

<https://www.youtube.com/watch?v=nz7z8L4tx1I>

Getting tested

People who have flu like symptoms should not be coming to work they will probably infect other people. With Coronaviruses the symptoms are very flu like, but because it's severe form is so dangerous it is important that people with the symptoms of the disease are tested.

There have been cases reported where people who have recovered from the disease have been reinfected so multiple testing of some people may be necessary.

People displaying flu like symptoms should not be at work. People experiencing flu like symptoms should, not be involved in the preparation or serving of food. Be careful that the staff of food outlets that you use are not exhibiting flu like symptoms.

Travel

In times of virus epidemics/pandemics travel should be limited. Travelling in confined spaces such as a taxi, bus, train or plane should be avoided unless you know that those vehicles are being regularly cleaned and sanitized.

If you are considering traveling to other regions within the country where you live, find out about that area before you leave, if it has declared a hot zone then you might not be allowed back until that ban is lifted.

If you are planning a trip overseas, check about the status of the country that you want to travel to. Also check that your travel insurer will cover you for Coronavirus. Some insurers won't cover you if you are booking after a certain cut-off date or if you are travelling to or through certain countries.

Some countries are asking travellers to isolate themselves for two weeks (at their own expense) once they arrive in-country before they do any visiting or sightseeing.

Check the Coronavirus status of the country you are going to on your government's travel website. You might get to your destination OK but you may not be able to get back if your country of origin has closed its borders with that country because of Coronavirus.

Gathering and crowds

Infected people in public places spread disease. When a virus epidemic or pandemic arises reducing exposure to the disease means reducing exposure to public places.

To reduce transmission of viruses the WHO and CDC do recommend the avoiding of large groupings of people. In serious epidemics safe grouping can be as low as 10 people. Projects should consider their need to meet in groups and how big those groups should be in times of a virus epidemic. They should also think about whether it may be safe to eat in a restaurant, attend a sports event, or even send your children to school. Government websites should be consulted to obtain guidance in these matters. If no advice is given then assume the worst and plan for a reduction of exposure to crowded situations.

Think about whether you need to attend meetings or sports events where large groups of people get together, these could be places where the infection can be passed on.