NORWEGIAN AGENCY FOR EXCHANGE COOPERATION

Guidelines

NOREC
NORWEGIAN AGENCY FOR EXCHANGE COOPERATION

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Norec definitions

Norec
The Norwegian Agency for Exchange Cooperation (Norec) is a Norwegian government agency under the Ministry of Foreign Affairs, mandated to finance the international exchange of persons within the framework of institutional cooperation.

Exchange
Sending and receiving young people on work placements between partners in different countries to learn and share knowledge and skills.

Partner
A civil society organisation, public or semi-public institution or private sector company. Partners take part in the planning and/or execution of a Norec-supported project and receive financial funding from Norec for this purpose.

Partnership
A group of partner organisations, companies or institutions, cooperating to implement a Norec-supported project. All the partners sign a partnership agreement for the duration of the project.

Coordinating partner
The signatory partner of the agreement with Norec. The coordinating partner (CP) has overall coordinating responsibility for the project. The coordinating partner has legal and financial responsibility to Norec on behalf of the partnership. The CP may be freely chosen by the partnership, for the duration of the project.

Youth
A person aged 18-35.

Participant
A person aged 18-35 whom the partners recruit and send abroad during the project. A participant can be recruited internally or externally.

Home and host partners
The home partner sends participants abroad. The host partner receives the participants.

Feasibility study agreement (FS agreement)
An agreement between Norec and the coordinating partner to explore the potential for a Norec project within the partnership.

Overall project description (OPD)
The main application document of the collaboration agreement application. It describes the partner organisations, partnership cooperation, expected results and project framework. The OPD specifies the number of rounds in the project.

Round application
A round is a shorter time frame within the overall project period during which activities, tasks and assignments are carried out by participants at the home and host partners to progress towards achieving the expected results. During the collaboration agreement period, the partners submit operational plans and budgets for each round of the project implementation (round applications). A round can last 3-18 months.

Project
The time frame during which the expected results described in the OPD are to be achieved by sending and receiving participants between partners. The project period is defined in the collaboration agreement. The project can comprise one or more rounds. A project cannot last longer than five years.

Collaboration agreement (CA)
An agreement between Norec and the coordinating partner, covering the project period. The CA states the responsibilities and obligations of Norec and the coordinating partner, and describes the project's overall objective and expected results.

Partnership agreement
An agreement entered into by the coordinating partner and the other partners in the partnership, defining the roles and responsibilities of each partner. It must cover the entire duration of the collaboration agreement.

Norec preparatory training
The main purpose of the preparatory training is to prepare the participants for their stay abroad. It covers topics on intercultural communication, leadership, global issues, health, safety and security. The training is compulsory for all participants.

Norec homecoming training
The purpose of the homecoming seminar is for participants to identify and reflect on results achieved and competences acquired during their stay abroad, and how to share these results and new competences when they return home. Personal challenges related to reintegrating are also addressed. The training is compulsory for all participants.

Additional training by the partner organisation
Norec provides general training relevant for work and life in another country. Each partnership can apply for funding for additional training, which should be specific to the partner, job or context the participants are in.

Onboarding by the partner organisations
All partners are responsible for preparing their participants. This onboarding is carried out by both the home and host partners before, during and after the exchange.

Partner training
Norec offers introduction seminars to new applicants and specific training for project coordinators. Norec's partner training is mandatory for all new project coordinators during the first year. It will provide good guidance on how they can best manage a Norec project. We also offer training on cross-cutting issues and other networking events. The training is offered digitally or at one of our course venues when travel restrictions allow.

Partner meeting
Compulsory meetings between partners during each round to plan and review the progress of the project. The meeting is funded by Norec in the project budget(s). Minutes from the partner meeting, specifying follow-up points, shall be submitted to Norec.

Midterm meeting
A compulsory meeting between the partners initiated by Norec halfway through the project period to review expected results, participants' work tasks, cooperation and communication routines. A representative/representative(s) of Norec will attend the meeting. The meeting is funded by Norec in the project budget(s).

Norec database
Contact details of applicants, partners, project contact persons and participants are registered in Norec's internal database for information purposes. Norec is obliged to hold this information for communication purposes in case of emergency. Personal data collected will not be shared with the public or outside Norec. All data and information received by Norec is handled in compliance with the Norwegian Personal Data Act (Personopplysingsloven LOV-2018-12-20-116) and EU General Data Protection Regulation (GDPR).

Online Public Archive

All documents received by and created by Norec are stored in Norec's online archive, Norec uses Public 360 case and archive system owned by TietoEvry. Archived documents include application documents, agreements, reports and payment details. The Norwegian Freedom of Information Act (English page: Offentleglova, LOV-2006-05-19-16) regulates access to public administration documents. The Act includes provision exceptions to the right of access.

Any person may apply to an administrative agency for access to case documents, journals, and similar registers of that administrative agency. If access is granted, no personal details or other sensitive information will be disclosed.

Norec’s ethical principles

Norec’s work is based on reciprocity. Our ethical principles lie at the core of this value. Participants, partners and employees are all ambassadors of Norec and shall act in accordance with these ethical principles in their work and in their relations with others.

We are culturally sensitive
We familiarise ourselves with local laws, culture, moral codes and traditions, and show respect in these matters by how we behave.

We respect human dignity
We show respect, by how we behave, to all individuals, regardless of race, gender, religion, colour, national or ethnic origin, language, sexual orientation, age, socio-economic status, political conviction, or any other distinguishing feature. We do not tolerate any form of harassment, abuse, discrimination, or any form of reprehensible conduct.

We are accountable
We consider the environmental consequences of our activities. We do not use our position to obtain benefits for others or ourselves. We have a zero-tolerance approach to corruption and other financial irregularities, and we report unacceptable circumstances or behaviour.

Part 1: Applications and reporting

How does Norec assess your application?

Applications are assessed in accordance with Norec's governing documents and principles:

1. Instructions for the Norwegian Agency for Exchange Cooperation (link)
2. Letter of Allocation No. 1 for each year from the Norwegian Ministry of Foreign Affairs (link)
3. Norec's grant scheme rules (link)
4. Norec's strategy (link)
5. Reciprocity (link)
6. Youth participation (link)
7. Formal requirements for partner organisations: to be legally established, financially stable and have the administrative capacity to manage an exchange project. The objective of the project should be in accordance with your organisation's mandate. In addition, all partners must comply with Norec's standards and work practices outlined in the Self-Declaration for Norec partners (link).

Project cycle

1. Feasibility study: To start an exchange project, you will first need to apply for and complete a feasibility study. If your application for a feasibility study is approved, you will receive funding to travel to attend a Norec *introduction seminar* and to conduct a *partner meeting*. The latter will enable you and your partner organisations to get to know one another better and agree on the goals for the project. During the feasibility study, you and your partner(s) are expected to prepare and plan for the exchange application. You need to choose a *coordinating partner* within the partnership. The guideline explains how to apply for a feasibility study, what is expected from the partnership and how to report on your feasibility study. The feasibility study report must be submitted and approved by Norec before an exchange project application can be approved.

2. Project application: Once you have completed the feasibility study, you can apply for a *Collaboration Agreement (CA)* with Norec. This usually comprises several exchange rounds and spans over more than one year. In the application, you and your partners must identify the goals of the project and outline how you will work together to achieve them. You need to draw up a round application and a budget for each round of exchange.

3. Exchange: Once you have entered into a Collaboration Agreement and round agreement with Norec, you can start recruiting the participants. Members of the partnership are jointly responsible for recruiting and following up the participants before, during and after the exchange. The key to success lies in recruiting the right participants, and providing meaningful tasks and a good learning environment.

4. Reporting: A round report must be submitted and approved after each round, and a results report at the end of the final round. In addition, your financial report and an externally audited report must be submitted and approved for each round of exchange.

Feasibility study

All projects start with a feasibility study. To receive support from Norec for a feasibility study, you must apply, with your potential partners, using the feasibility study application and budget templates on Norec's website. The purpose of a feasibility study is to acquire an understanding of the opportunities, risks and requirements associated with a Norec-supported exchange project.

During the feasibility study, the partners develop the plans for the Norec exchange project and assess the potential of their partnership.

The feasibility study includes two Norec-funded meetings between the partners:

1. *Introduction seminar:* During the introduction seminar, Norec representatives introduce Norec's principles of funding, results-based management, participant administration, ethical principles, and other useful topics for project management and writing a collaboration agreement application. The seminar also focuses on the understanding of the commitment needed in a Norec exchange project (for example visa and work permit requirements, taxation systems and accommodation arrangements). This meeting can be digital, physical or a combination of the two. For more information about the introduction seminar, go to the section on training guidelines and requirements in these guidelines.

2. *Partner meeting:* The partner meeting should be hosted by one of the partner organisations, and normally takes place at the premises of one of the partner organisations. The aim of this meeting is to further develop the project application and for the partners to get to know one another better, including each organisation's financial management systems and routines. Norec funds a two-day partner meeting, in addition to travel days, but the partner meeting can be longer if required. However, Norec funds maximum two days. This meeting can be digital, physical or a combination of the two.

Checklist: application documents

- Feasibility study application (A01)
- Feasibility study budget (A02)

Documents from all partners:

- Registration document
- Signature rights
- Statutes
- Latest annual report
- Latest audited consolidated annual financial statement
- Self-declaration on organisational conditions and practices (E19-template)
- Valid registration document for the audit firm that will audit the Norec funds (only applicable if the grant amount exceeds NOK 100 000)
-

Norec approves or rejects the feasibility study application based on the rules and regulations governing the grant schemes offered by Norec, the Norwegian government's current priorities for development cooperation, and Norec's budget situation. More information on how Norec assesses your application can be found on page two of these guidelines. Norec may collect additional information on applicants, such as carrying out a credit check or contacting referees.

A feasibility study including report shall be completed within eight months from the date of approval of the application. The feasibility study ends when the feasibility study activity report and financial report have been processed by Norec.

An approved feasibility study does not automatically mean that a collaboration agreement application will be approved.

Feasibility study application

1. FACT SECTION

The information requested in this section will be stored in Norec's internal database and the online public archive for communication purposes. The bank and auditor details are required for Norec to transfer funds. Note that the auditor used by the organisation must be certified, have a valid registration and be authorised/approved by the relevant national authority.

1.1. Coordinating partner's name and registration number
The partnership is represented vis-à-vis Norec by a coordinating partner who, as the signatory party, is financially and legally responsible for the project. The coordinating partner may be freely chosen by the partnership, for the duration of the project.

We require the legal name of the organisation. If the name the organisation is registered under (as on the registration certificate) is different from your operating name, state the legal name and put your operating name in parenthesis.

For Norwegian partners, the name must be identical to the name registered at the Brønnøysund Register Centre.

1.4 Internal administration
Every organisation involved in a Norec-supported exchange project must have at least five permanent full-time employees, or equivalent volunteer capacity. Please describe your procedures for election or appointment of board members.

Norec's target group is young people aged 18-35. Briefly describe how your organisation works with young people in no more than eight sentences. This may be with young people as staff, leaders, volunteers, board members, members or as target groups for your daily operations. If you have any specific recruitment policies concerning young people, describe these here.

1.5 Financial management
The coordinating partner is the organisation that will receive the grant from Norec, for onward distribution within the partnership. This means that all the partners must be able to receive and transfer funds internationally.

In this section, you must also provide information on your financial guidelines, including a description of routines for whistleblower and/or anti-corruption policies, as well as any other relevant information. Describe the checks and balances system of control between management and board.

1.6 Project management
To assess your organisation's capacity and routines, Norec carries out reference checks. The listed referees should be national or international donors.

3. PARTNERSHIP

If you have any previous experience of formal work collaboration, please describe this here. If you have not formally worked together before, explain how collaborating on an exchange project can be a positive means to strengthen the relationship between the organisations.

Norec's model involves mutual exchange of participants, and a key principle for Norec is that the organisations involved have equal ownership, cooperate equally in decision-making processes and communicate freely. For more information, go to the section on reciprocity in this guideline.

4. PROJECT IDEA

Here you must describe your preliminary idea for an exchange project. Present the needs and challenges that you intend to address and how an exchange of competences and skills between your organisations can help address those needs.

Based on the identified needs or challenges, you must identify provisional results that can be obtained by exchanging participants. For more information about the results-based management, go to the section on how to fill in the results framework.

Describe the type of exchange participant you expect to recruit (education, background, volunteering in organisation etc.), and between which countries the participants will be exchanged. Specify the provisional number of participants you plan to recruit.

4. ACTIVITY PLAN FOR THE FEASIBILITY STUDY

Present a provisional timeline for all the activities you intend to complete during the feasibility study, including information on communication channels and frequency of communication, timeline for document preparation and any additional meetings. We recommend including your provisional agenda for the partner meeting.

Feasibility study budget

The feasibility study budget is an annex to the feasibility study application.

The budget template is an Excel file containing one sheet for the budget and one sheet for the financial report.

Funding principles
The amount granted by Norec will be determined based on an assessment of the actual costs of travel and accommodation, the general cost level in the countries involved and/or in line with other feasibility study budgets that Norec has approved.

The grant will be settled based on actual documented costs. 60% of the grant will be paid at the start of the feasibility study. The remaining balance – up to actual costs – will be paid after Norec has received and approved the feasibility study financial and activity reports. Amounts over the approved budget grant will have to be covered by the partners, unless approved by Norec prior to reporting.

Norec covers the costs for two persons from each organisation to attend the partner meeting and the introduction seminar. We recommend that staff with key roles in the project from each organisation participate in both meetings.

Budget
In the budget, you must fill in the expected expenditures for each partner in the partnership.

Budget currency: (USD or NOK)	<Coordinating partner>				<Organisation 2>			
	UNIT AMOUNT	NUMBER OF PERSONS	NUMBER OF DAYS	TOTAL	UNIT AMOUNT	NUMBER OF PERSONS	NUMBER OF DAYS	TOTAL
Introduction seminar organised by Norec								
- Travel				0				0
- Per diem (days)				0				0
- Accommodation (nights)				0				0
- Visa, vaccines and similar								
Partner meeting								
- Travel				0				0
- Per diem (days)				0				0
- Accommodation (nights)				0				0
- Visa, vaccines and similar								
Other expenses								
- Other expenses for partner meeting								
- Audit (for projects exceeding NOK 100,000)								
TOTAL				**0**				**0**

BUDGET TOTAL, ALL PARTNER REPRESENTATIVES AND OTHER EXPENSES		**TOTAL (NOK/USD)**
		0

TRANSFER SCHEDULE - FROM NOREC TO <COORDINATING PARTNER>			
TRANSFER SCHEDULE	**DATE**		**AMOUNT (NOK /USD)**
Transfer 1 (60%)			0
Transfer 2 (40%)	To be decided		0
TOTAL			**0**

The following applies to both the introduction seminar and the partner meeting organised by the partners:

Travel
Fill in the costs of international flights and transport to/from airports. You must choose the most economic means of travel.

Per diem (days) and accommodation (nights)
Fill in the costs of accommodation and per diem required per day. Maximum rates per country for per diem and accommodation are stated in the table below. If meals during the introduction seminar are covered by the hotel or Norec, the per diem should be reduced or not included. Norec covers per diem for travel that exceeds 12 hours one way.

	Maximum rate, accommodation		Per diem	
	NOK	USD	NOK	USD
Africa				
Burundi	550	65	240	28
Ethiopia	1 100	129	252	30
Ghana	880	104	342	40
Kenya	880	104	390	46
Madagascar	495	58	198	23
Malawi	605	71	240	28
Mozambique	1 155	136	246	29
Rwanda	935	110	336	40
South Africa	1 375	162	270	32
Sudan	963	113	150	18
Tanzania	1 073	126	294	35
Uganda	935	110	336	40
Zambia	743	87	276	32
Zimbabwe	715	84	432	51

	Maximum rate, accommodation		Per diem	
	NOK	USD	NOK	USD
Asia				
Bangladesh	1 650	194	324	38
Cambodia	908	107	384	45
China	1 100	129	486	57
Hong Kong	1 705	201	534	63
Shanghai	1 320	155	486	57
India	935	110	300	35
Indonesia	1 100	129	312	37
Myanmar	935	110	300	35
Nepal	1 100	129	384	45
Thailand	770	91	426	50
Vietnam	715	84	288	34
Latin America				
Brazil	1 210	142	336	40
Rio	1 650	194	372	44
Colombia	1 100	129	330	39
Guatemala	605	71	408	48
Nicaragua	660	78	288	34
Norway				
Norway	1 980	233	780	92

Other expenses

Other expenses may include certified translation of registration documents, statutes and audit report, interpreters' fees, meals not covered by the per diem and rental of venue if needed. Enter the full amount and indicate in the "notes" cell why the amount is needed and a breakdown of the costs.

Audit
If your total budget exceeds NOK 100,000, you are required to have the funds audited. For budgets under NOK 100,000, a narrative and financial report are sufficient. Norec may, however, ask for documentation of costs.

Transfer schedule

You can suggest a date for the first transfer of funds. Norec will set a final date for the transfer once the application has been approved.

Signature

The budget is not a valid annex to the application unless it has been signed and dated by the coordinating partner's authorised representative (the person with signature rights).

Feasibility study activity report

The purpose of the activity report is to provide Norec with a narrative assessment of the feasibility study.

2. PARTNERSHIP

Provide information on decision-making procedures in the partnership. For example: How did you share responsibilities? How did you communicate during the feasibility study? How did you work on this report and the collaboration agreement application (if applicable)?

Describe how you ensured receipt of funds from Norec and further disbursement within the partnership. How did you decide the amounts to be transferred? Describe how you monitored the expenditure during the feasibility study: How did you ensure financial control of the funds?

3. PROJECT IDEA

Provide information on when you intend to apply for a collaboration agreement or why you have decided not to pursue a collaboration agreement application. If you intend to submit a collaboration agreement application, it must be submitted to Norec within 12 months from the end for the feasibility study.

If you intend to apply for a collaboration agreement, describe what each organisation can gain or learn from collaborating on an exchange project.

4. ACTIVITY PLAN

For each meeting point, provide the date and location of the meeting. State also the total number of attendees (with titles) at each meeting. Provide a brief description of the main results from each meeting. What was the most important learning? What was the most important decision made? How did the meeting(s) affect your original project idea?

Feasibility study financial report

Norec's funding principles are stated in the feasibility study agreement as follows:

- Norec funds the feasibility study by means of a grant based on the calculated costs in the approved budget and in accordance with Norec's budget requirements. The grant will be settled based on actual, documented costs.
- A weighted average of the exchange rate must be used in the financial reporting.
- Bank charges on the internal transfers between partners must be covered by the partners.

There are certain acceptable limits of deviation for each budget line as follows:

- The total budget may not be exceeded without formal renegotiation.
- Deviations of +/- 10% on each budget line do not require comment.
- Deviations of +/- 10-20% on each budget line are acceptable without prior approval by Norec but require an explanatory note to the budget line in question in the "Comments" column.
- Deviations of more than +/-20% on each budget line require prior approval by Norec.

In the report section "Fund balance to be disbursed/repaid", enter the approved budget total in the top cell. Then enter the actual amount received from Norec in the second cell and your actual expenditure in the third cell. The total difference is the amount that you will either have to repay to Norec or Norec will disburse.

If the grant exceeds NOK 100,000, an audit report must be submitted with the activity report and financial report after completion of the feasibility study. For more information about the audit report requirements, go to the section on audit statement in these guidelines.

Both the financial and activity reports must be signed by the person with signature rights at the coordinating partner before being submitted to Norec

Collaboration agreement application

The collaboration agreement is a framework agreement between Norec and the coordinating partner of the partnership. The agreement provides the framework for implementation of an exchange project. The maximum duration of a collaboration agreement is five years.

- First-time applicants to Norec can apply for a collaboration agreement of maximum two years' duration.
- If you have had a previous collaboration agreement with Norec and have demonstrated high quality and good results, you can apply for a collaboration agreement of maximum three years' duration.
- If you have had a previous collaboration agreement with Norec for five years or longer and demonstrate solid plans for organisational learning/development, you can apply for a collaboration agreement of maximum five years' duration.

The application for a collaboration agreement with Norec is usually developed during the feasibility study. The coordinating partner submits the application on behalf of the partnership.

The application for a collaboration agreement comprises a number of mandatory documents and annexes (see below). The collaboration agreement application also contains the description and budget for the first round of exchange. A separate round application and budget must be submitted and approved by Norec for each of the subsequent rounds.

Checklist: application documents

- Overall project description, including results framework (B01)
- Partnership agreement (E03)
- Emergency plan (E08) (to be submitted if the application is approved)
- Participant contract of employment (to be submitted if the application is approved)
- Round 1 budget (C02)

Documents from all partners:

- Registration document
- Signature rights
- Tax statement
- Statutes
- Latest annual report
- Latest audited consolidated annual financial statement
- Unaudited/draft financial statement no more than three months old
- Self-declaration on organisational conditions and practices
- Valid certificate of registration from the audit firm that will audit the Norec funds

Overall project description (OPD)

The main document of the collaboration agreement application is the overall project description (OPD). This provides information on the organisations in the partnership, the project and the operational framework of the project. Instructions on how to fill in the application form can be found below.

1. FACT SECTION

1.1. Coordinating partner's name and registration number

State the legal name and put your operating name in brackets if the legal name is different from the operating name. For Norwegian partners, the name must be identical to the name that is registered at the Brønnøysund Register Centre.

1.2. Exchange project name and content

Give your project a short, suitable name. Provide a short description of your project in 2-4 sentences. The information in this section will be used by Norec in external communication about the project, e.g. on the Norec webpage (www.norec.no/en/projects/). The collaboration agreement also requires the partners to publicise the Norec project within their own organisation, in their local community and to the public in general.

1.3. Exchange project duration

The collaboration agreement can last up to five years. State the year you intend to start and the year you intend to complete the project. Please contact your programme adviser to discuss the appropriate duration for your project.

You must specify the number of exchange rounds you intend to complete during the project period. A round of exchange starts with the preparatory training and continues with the period of exchange abroad. At the end of their stay abroad, participants shall attend a homecoming seminar organised by Norec. For more information on Norec's training courses, go to the section on training guidelines and requirements in these guidelines. Information about Norec's upcoming training courses can be found here: www.norec.no/en/training/upcoming-training/. The end of each exchange is the final day of the follow-up work. A round of exchange must include a stay abroad for the participants of minimum six months and maximum 18 months. Shorter or longer periods abroad can be approved where there are good reasons for this.

The follow-up work period is the period after the participants have been abroad on exchange, during which they carry out tasks, assignments and activities for their home organisation. The follow-up work is normally two months' full-time work or the equivalent time as part-time work. It is a crucial element in any exchange project to facilitate the transfer of knowledge and skills acquired during the stay abroad from the participants to their home organisation. A shorter period of follow-up work can be applied for where there are good reasons for this.

1.4. Profiles of the various organisations

The information requested in this section will be stored in Norec's internal database for communication purposes. The bank and auditor details are required for Norec to transfer funds, and to verify that the auditor used by the organisation is certified and has a valid registration.

Internal administration

Every organisation involved in a Norec-supported exchange project must have at least five permanent full-time employees or equivalent volunteer capacity. If the highest administrative unit in your organisation is a board, describe your procedures for election or appointment of board members. Provide information on the composition of the Board or the highest administrative unit (its members, their backgrounds and their involvement in the organisation's affairs).

Norec's target group is young people aged 18-35. Briefly describe how your organisation works with young people, whether as staff, leaders, volunteers, board members, members or as target groups for your daily operations. If you have any specific recruitment policies concerning young people, describe these here.

Project management

Norec needs to know whether your organisation has previous experience of project planning and implementation to assess your organisation's capacity and routines to manage a project.

Norec carries out reference checks to obtain information from a third party about the organisation's capacity to receive project funds, implement and financially administer a project. The reference is used to assess the organisation's internal administration. The listed referees could be from partners in your network, or from national or international donors.

Financial management

In this section, you must provide information on financial administrative routines and a self-assessment of your organisation's financial situation. You can include information on other sources of income or donors in the pipeline. Provide information on your financial guidelines, including a description of routines for financial control and accountability, and of routines for whistleblowing and/or anti-corruption policies. Also, describe your organisation's routines for compiling annual reports and annual budgets, who has signature rights and how involved the Board (or highest administrative unit) is in the financial affairs of the organisation.

You must also describe here whether you can receive and transfer funds internationally. In a Norec-supported exchange project, the coordinating partner will receive the grant from Norec for further distribution within the partnership. All partners must be able to receive and transfer funds internationally.

2. DESCRIPTION OF THE EXCHANGE PROJECT

2.1. Needs assessment

In this section, you must put your project into a wider context and explain what needs or challenges you have identified for your organisations, your target groups, or your communities that you intend to address with this project. What do you want to change, and why? What do you want to learn from one another as organisations? What do you wish to improve in your organisation and what do you want to improve for your target group or in your community?

Keep in mind Norec's vision: "The world is full of knowledge and skills. Through mutual exchanges, we teach each other to think bigger, live more sustainably, and build responsible local communities."

2.1.1. State the overall objective of the exchange

The overall objective is a short statement of what you as partners want to achieve through the exchange project. It must reflect the information you provided in the needs assessment. Provide a description of why you think an exchange of young people is an appropriate and useful approach to achieve the overall objective and the expected results of the project. Indicate how your project can contribute to better conditions for your target group or community.

2.2. Participants' tasks, assignments and activities

Provide a narrative description of how the participants' tasks, assignments and activities while on exchange and during the follow-up period will contribute towards achieving the expected results. It is important that the participants' work description is clearly linked to the expected results. The description must cover the entire project period, including the follow-up work period, and indicate expected progress towards the results of each round of exchange. To achieve the expected results, the organisations must have made clear plans to ensure the follow-up part of each round of exchange is an integrated component of the project.

2.3. Results framework

You can either use one of Norec's two standard results framework templates (annexed to the overall project description template) or your own template, provided it includes the same elements.

The results framework serves two purposes: a project-monitoring and guidance tool for the project implementation, and a reporting instrument. This means that the results framework must be logical and as specific as possible. The expected results shall be possible to achieve over the course of the full project period. The results framework is valid for the whole project period. Norec's method is mutual exchange of people. The expected results must be achievable using this method. For more guidance on how to fill in the results framework, see the section on results-based management.

2.4. Sustainability of expected results

By the end of the project, Norec expects you to have achieved the expected results that you planned for. You must therefore ensure that the knowledge and competences acquired by the participants during the project are transferred to the home and host organisations. Strategies for learning must be in place to use the skills and competences learnt from the participants during, and after, the project ends.

2.5. Sustainable Development Goals (SDGs)

The UN's Sustainable Development Goals (SDGs) and Agenda 2030 are among the pillars that support Norway's foreign policy. For Norec, this means that the projects we support should contribute to achievement of the SDGs. For more information on the SDGs, please go to the relevant pages on the United Nations' website: UN's Sustainable Development Goals.

2.6. Youth participation

Youth participation is a core value for Norec, which defines a youth as a person aged 18-35. Explain how the exchange of young people can contribute to increased youth participation and influence in your organisation or in the target group. Improving or increasing youth participation in your organisation or target group can also be included in your overall objective or be an expected result for the project. For more information on this topic, see the section on youth participation in this guideline.

2.7. Risks and risk management

It is important that you have thought about the risks that you will face when sending and receiving young people, both before and during the project. The content of this section gives Norec a basis for assessing how prepared you are for different situations that you may have to handle before and during the project.

In addition to project- or partner-specific risks, your risk analysis must include an assessment of risks related to human rights, women's rights and equality, climate change and the environment, and anti-corruption. These are cross-cutting issues in Norwegian development policy and must be taken into consideration in all Norec-funded projects.

External risks refer to risks outside the organisation's control, for instance climate change; state regulations and procedures for processing visa applications, work permits and permits for international financial transactions; currency fluctuations; social or political unrest; annual rainfall/flooding or similar.

Internal risks refer to risks in the running of the organisation and the exchange project. Such risks may include working conditions, understaffing, staff turnover, ownership of the exchange project in the partner organisations, collaboration between partners, finding the right participants, transfer of funds within the partnership, collaboration with other actors involved, and management of exchange participants, including inadequate preparation, dissatisfaction, homesickness etc.

Mitigation refers to how you intend to prevent this situation from arising (if possible) and how you will manage the risk if it does.

Probability that this risk will occur: We expect you to assess the likelihood of these risks arising. Use terms such as "low, medium, high" or "unlikely, possible, likely".

Risk impacts are often defined as the consequences or effects of a risk event for the project objectives. Briefly describe the consequence a risk could have if it occurs.

Example:

External risk	Mitigation	Probability that this risk will occur	Risk impact (consequence if risk happens)
Difficult to obtain a work permit for participants	*Start the application process early and ensure proper documentation*	*high*	*Work permit application rejected, and project start delayed*

You do not need to use the table in the application document if you have an independent risk analysis for your organisation, which also includes the exchange project.

3. PROJECT FRAMEWORK

The participants are the main tool of every Norec-supported project and the key to achieving the expected results. For them to perform as well as possible, the partners must ensure proper recruitment and preparation of the participants before they travel to their host countries, and a proper introduction to the working environment of the host organisation on arrival. All partners must ensure adequate mentoring strategies, and plans for learning and transfer of knowledge, adapted to their context and work methods but also to each participant. The partners must also ensure satisfactory working and living conditions for the participants and that they have access to adequate health services.

The information provided in this section is important for Norec to assess the appropriateness of arrangements planned by the organisations and the costs included in the budget. This information includes the participant profiles, i.e. the participants' work/educational background, qualifications and/or other experience. If the partnership organises job- or context-specific training, the learning objectives shall be described.

Norec is also interested in knowing how former participants continue to be involved in and/or contribute to the project and/or organisations in the partnership.

For more information on Norec's requirements and recommendations for practical arrangements, recruitment, mentoring and training, see Part 2: Managing an exchange project in these guidelines.

4. DESCRIPTION OF THE ROUNDS

4.1. Number of exchange participants

Illustrate from where to where the participants will be going during the first round of exchange. This table will form the basis for all rounds of exchange, although the actual numbers of participants may vary between rounds. For security and communication purposes, Norec must know where participants are on exchange.

Example:

Number of participants from	to Organisation A in Myanmar	to Organisation B in Colombia	to Organisation C in Malawi	TOTAL
Organisation A in Myanmar		2	2	4
Organisation B in Colombia	2		2	4
Organisation C in Malawi	2	2		4
TOTAL	4	4	4	**12**

4.2. Timeline for the exchange participants in Round 1

The participants' contracts must be valid from the date of departure from the home country to the preparatory training until the final day of the follow-up work.

For information on Norec training dates and locations, see our website: https://www.norec.no/en/training/upcoming-training/.

If all the participants from the same organisation will have identical timelines, you can indicate this by replacing the heading “Participant 1” with e.g. “Participants 1-3”, depending on the number of participants.

ANNEXES

Your collaboration agreement application must contain all the required documents. Norec may require the documents submitted to be in either English or Norwegian. A certified translator must be used for translations.

DOCUMENTS ON BEHALF OF THE PARTNERSHIP

Partnership agreement
The partnership agreement is an agreement between the coordinating partner and the other partners in the partnership, focusing on the internal roles and responsibilities in the partnership, with the same duration as the collaboration agreement. Norec has developed a template for the partnership agreement (E03), which specifies the minimum information for the partners in the agreement. Each partnership can add items to the agreement, but nothing can be deleted from the template.

Results framework (see point 2.3. on page 17 for more information)

Round 1 budget (see page 22 for more information)

DOCUMENTS FROM ALL PARTNERS IN THE PARTNERSHIP

Signature rights (if not already submitted)
The individual who has or has been given signature rights must sign all the agreements and budgets with Norec, and the partnership agreement. If the signatory is not the executive director (or equivalent), a power of attorney must be made for the person signing the applications, budgets and agreements.

Self-declaration on organisational conditions and practices (if not already submitted)
Norec expects all partners to comply with the standards and requirements listed in the self-declaration form. You must inform Norec if you do not comply with any specific standards or cannot meet any specific requirements.

Certificate of registration (if not already submitted)
You must submit the following documentation to confirm that your organisation is a legally established organisation, institution or company.

- Norwegian partners: Enter your organisation number from the Brønnøysund Register Centre in the fact section of the overall project description.
- Non-Norwegian partners: Enclose a certificate issued by the relevant authority confirming that the organisation is appropriately registered in accordance with the laws of the country where it operates.

Tax statement (if not already submitted)
The partner shall fulfil its obligations relating to payment of taxes, VAT and similar under the laws of the relevant country in which the organisation is established. The tax statement must be valid on the date of application. A tax statement is usually an official statement from your country’s tax and/or revenue authorities stating that your organisation is tax compliant or tax exempt.

Statutes (if not already submitted)
Statutes are instruments or regulations that govern the institution or the organisation. The statutes are expressed in a formal document, which is adopted or enacted by the governing institution.

Latest annual report
The annual report is a document summarising the activities and management of the organisation in the past year. You must either submit the report in PDF format or provide a reference to the relevant link on your organisation's website. If you do not have an annual report, please provide an explanatory note.

Latest audited consolidated annual financial statement
This is a document in which the financial results for the previous financial year have been audited by an external, independent and certified auditor. The audit report must cover all income and expenditure in your organisation, management letter, and auditor's evaluation and/or recommendations. If you do not have an organisational audit report, please provide an explanatory note.

Financial statement no more than three months old
This statement shall demonstrate the organisation's financial situation at the time when the application is submitted. It must provide information of your organisation's income and expenditure, and balance sheet.

Valid certificate of registration for the audit firm that will audit the Norec funds
Norec requires the audit firm that will audit the Norec funds to have been given the right to operate as an auditor by the relevant national authority. Most countries have official registers of active and registered auditors. In addition to the audit firm's certificate of registration, please include the website of the national authority where the audit firm is registered, with a direct link to the register.

DOCUMENTS TO BE SUBMITTED IF THE APPLICATION IS APPROVED

Emergency plan
The partners must ensure that all participants are informed of relevant risks and safety issues in the country or city/area where they will be hosted, and that relevant precautions are taken both by the host partners and the participants. The emergency plan must contain routines, relevant contact information and procedures in the event of an emergency. The scenarios must be specific to the city, district, country or region where the participants will stay.
The emergency plan must be kept under frequent review to ensure that it is up to date. It can be based on the Norec template (B05) or you can submit your organisations' existing emergency plans if available.
We recommend that you plan for the most probable scenarios and ensure that the emergency plan is accessible to all staff, participants and partners in the partnership. Probable scenarios include fire in the office, robbery and health-related emergencies.

Participant contract of employment
The participants must sign a contract of employment. This can be the same or similar to your organisations' standard contracts of employment and must as a minimum observe the labour standards, and taxation laws and regulations of the host country. In addition, the requirements specified by Norec must be included. For more information on Norec's requirements, see the section on recruitment of participants in these guidelines.

Round application

The round application consists of two documents, the round description (C01) and the round budget (C02), and must be submitted for each round of the exchange, except the first round, which is an integrated part of the overall project description.

Checklist: application documents

- Round description (C01)
- Round budget (C02)

Documents from all partners:

- Latest audited consolidated annual financial statement
- Latest annual report (if available)
- Valid certificate of registration for the audit firm that will audit the Norec funds

Round description (round 2 onwards)

The project details, and the structure and content of the project rounds are described in the overall project description and are valid for every round of exchange within the project period. The round description for round 2 onwards should provide information on what has been learnt so far in the round you are currently in. It must also provide information on any deviations, changes or modifications made for the round, compared with the description provided in the overall project description.

1. FACT SECTION

Provide a brief description of the financial situation of all the organisations in the partnership. Do not cut and paste from the overall project description, as Norec requires an updated self-evaluation of the organisations' financial situation. The evaluations must be verifiable in the financial documentation you submit with the round application (see annexes).

2. DESCRIPTION OF THIS EXCHANGE ROUND

2.1. Lessons learnt from current round

The information required in this section gives Norec a basis for assessing the development in your organisations.

Lessons learnt can be both small and big. They can be practical approaches to necessary processes such as work permit applications, accommodation arrangements and recruitment strategies, or more programmatic issues such as modifying strategies and approaches to achieve the expected results. Communication routines within the partnership and adjustment of fund transfer dates are further examples of potential lessons learnt.

2.2. Significant deviations, changes or modifications for this round

Norec will approve justified changes, modifications and deviations that are necessary for this round compared with the previous round. You must describe the changes you plan to make and explain in detail why they are necessary or positive for the project to progress towards the expected results.

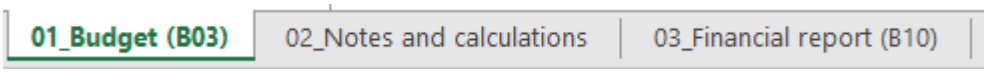
2.3. Timeline for the exchange participants

See section 4.2. under the overall project description part of the guidelines for technical guidance on how to fill out the timelines.

Round budget

The round budget (C02) is an annex to the overall project description (OPD) and round description (C01).

The round budget template is an Excel file that consists of a first sheet called “Budget”, a second sheet called “Notes and calculations” and a third called “Financial report”. The first two sheets must be filled in before you submit the budget, together with the overall project description and/or the round description. You will find the various sheets at the bottom of the open Excel file.



Funding principles

The amount granted by Norec will be determined based on an assessment of the actual costs of the activities, the general cost level in the country and/or the type of personnel to be recruited for the exchange. In the event of overexpenditure, or if funds are used differently from what is stated in the approved budget, you will have to cover the expenditure from your own funds. You are also free to supplement the grant from Norec with funding from other sources. Any unspent funds in the budget must be repaid to Norec.

There are certain acceptable limits of deviation for each budget line as follows:

- The total budget may not be exceeded without formal renegotiation (amendment).
- Deviations of +/- 10% on any budget line do not require comment (provided there is no change in the number of Norec participants and the length of their contracts).
- Deviations of +/- 10-20% on any budget line are acceptable without prior approval by Norec (provided there is no change in the number of Norec participants and the length of their contracts) but require an explanation in the financial report.
- Deviations of more than +/-20% on each budget line require prior approval by Norec.
- Funds allocated to participant expenses cannot be used for administrative costs.

Budget (C02)

Agreement ID (assigned by Norec)

Leave this cell blank. This ID will be assigned by Norec if the application is approved.

Currency (NOK or USD)

Choose the currency you are budgeting in. If the coordinating partner is Norwegian, the budget must be in NOK. If the coordinating partner is from any other country, the budget must be in USD.

Exchange rate, if USD

If the budget is in USD, state the exchange rate between USD and the local currency of the coordinating partner that you have based in the budget.

The budget is partner specific, meaning that you must show costs per partner. Not all budget lines must necessarily be filled in for all partners. For example, if one organisation will purchase insurance for all the participants involved in the project, costs of insurance must only be filled in for this partner, multiplied by the number of applicable participants. “Total participant and partner expenses” specifies the total grant each partner will receive from Norec.

There are specific maximum rates for some budget lines. All amounts in the budget must be explained and justified in the third sheet, “Notes and calculations”.

Participant-related costs

Allowance (including taxes) or stipend

Participants in a Norec-supported project receive one of two kinds of monthly remuneration: an allowance or a stipend.

The allowance or stipend must cover the whole project period for the participant, including Norec’s preparatory training and homecoming seminar (if applicable) and the follow-up work at the home organisation after the exchange period abroad. If the follow-up work is not carried

out as full-time (100%) work, Norec covers only the allowance or stipend in line with the percentage of employment.

The first month of the contract for the participants is normally the month of the Norec preparatory training. All participants must have received part of their allowance or stipend prior to this.

Criteria for receiving allowance/stipend:

To qualify for an allowance, the participant must fulfil the following criteria:

- Role – The participant must have a role in the project that aims to contribute to the institutional/organisational development of at least one partner organisation.
- Work permit – Participants must have a work permit or equivalent document while they are working with the host organisation.

In addition to the two criteria above, the following apply:

- If the participants are internally recruited, they must be young employees, with a salary and contract of employment.
- If the participants are externally recruited, they must have a professional background or university degree relevant to the planned work tasks in the project.

Some categories of participants cannot receive allowances, namely:

- Students
- Participants without work and/or residence permits for the host country
- Participants working in a group of four or more participants from each organisation per round

If the participants you intend to recruit fall within one or more of these categories, they do not qualify for allowances but qualify instead for stipends.

Allowance

The level of the monthly allowance must be comparable to the salary of staff at the home and host organisations with similar tasks and qualifications. The amount specified in the budget must include all applicable income taxes (gross allowance) and benefits such as holiday pay, in accordance with national regulations. The amounts specified in the budget need to be described with reference to national requirements in the “notes and calculations” sheet (sheet 3) of the budget template.

The maximum rate of allowance for participants going to Norway is ca net NOK 10,000 after taxes per month (total budgeted amount depends on the taxes applicable).

The maximum rate of allowance for participants from Norway is gross NOK 20,000 before taxes per month.

When setting the monthly allowance, you must provide adequate information justifying the allowance level.

Stipend

In cases where the criteria for an allowance are not met, the partners can apply for stipends to cover the participants’ basic daily costs:

- food
- social activities
- basic necessities

You must provide adequate information justifying the stipend level. The monthly stipend must be similar in level to that received by other volunteers, interns or students at the host organisation (if applicable) or in line with national standards.

The maximum rate of stipend for participants going to Norway is NOK 5,000 per month.

Participants receiving stipends may be subject to taxation, depending on the regulations of the countries involved. You must provide information on taxation requirements for participants receiving stipends. Norec may request documentation to verify this information.

You can add NOK 500 for public transport costs for participants not going to Norway and NOK 1,000 for participants going to Norway.

Norec may ask for documentation to justify the level of allowance/stipend.

Taxes and pension paid by the organisations
This budget line is applicable to projects with participants who receive an allowance. If the national legislation in the countries involved also requires this for participants without work permits (such as interns, volunteers etc.), it also applies to projects with such participants.

In your capacity as the participants' employers, you must undertake mandatory social security payments according to national laws and standards in the countries concerned. Examples are mandatory contributions to government employment funds, national health insurance schemes, national insurance and provident funds. The form and levels of such payments may vary from country to country. You must describe this in the "notes and calculations" sheet in the budget and provide documentation of the same.

Accommodation
The accommodation grant is intended to provide the participants with a safe and reasonable standard of living in the host country. It is the responsibility of the host partner to find suitable accommodation for the participants. The host partner must pay for the accommodation.

Accommodation costs must be reasonable given the local context, and the accommodation must be comparable in standard to that of the participants' colleagues. If you intend to accommodate more than one participant in the same apartment or house, you must ensure that all bedrooms have a lockable door.
The amounts budgeted for on the accommodation budget line must cover monthly rent, utilities (electricity, gas, water) and common service charges.

Suitable accommodation might be a host family, a 1- or 2-room apartment or an apartment shared with other participants. The accommodation costs must cover the whole period of the participant's stay abroad.

Maximum rates for accommodation in Norway

For participants receiving a stipend, the maximum monthly accommodation rate is NOK 5,000. For participants receiving an allowance, the maximum monthly accommodation rate is NOK 6,000.

- For both categories: If staying in Oslo, Bergen, Trondheim, Tromsø or Stavanger, the maximum monthly accommodation rate is NOK 8,000.

Insurance
The partners must make sure that participants are insured for the entire period of their contracts. There are two kinds of insurance that all participants must have:

- Travel insurance: The travel insurance must cover participants from the date of departure from the home country to the preparatory course organised by the partnership and/or the Norec preparatory training until they have arrived in the host country. It must also cover participants from the date of departure from the host country to the Norec homecoming seminar and/or until arrival in the home country.
- Health/medical insurance: The health insurance must cover the entire contract period, including all Norec training, the exchange period abroad and the follow-up work.

The participants must be informed of the level of insurance cover, and the partners must provide the participants with the insurance policy document and number. The costs of the insurance policies must be documented to Norec on request.

Any additional insurance required by the partners because of the nature of the project or otherwise can be applied for, and must be justified and documented to Norec.

Departure/set-up grant
The departure/set-up grant is to be handled in its entirety by the partners and is not to be given to the participants. All expenditure drawn from this budget line must be documented in the project's audit and receipts provided. Funds in this budget line cannot be used as "pocket money" or similar for Norec training courses. All costs related to this budget line must be described in sheet 3 of the budget template and documented to Norec on request.

The departure/set-up grant must cover the costs of obtaining participants' passports, and other official papers and documents prior to departure.

The departure/set-up grant must also cover vaccinations and medicines necessary in the host country and, if required, a medical check-up before departure from the home country.

If required, it can be used to purchase necessary personal working tools, clothing, cooking equipment, furniture, bed linen, utensils, mobile phone SIM card and other essential practical items for the participants' set-up on arrival in the host country.

Visas and permits
This budget line only covers costs necessary for obtaining participants' visas, work and/or residence permits. It includes:

- fees for any necessary visa/work permit/residence permit for the participant and renewals
- any necessary travel to and from consulates, visa offices and embassies for the processing of visa/work permit/residence permit applications
- visas for Norec preparatory training courses if these are in a third country

All costs must be described in sheet 3 of the budget template and documented to Norec on request.

Language courses
A grant for language course tuition fees may be awarded where this is necessary for the participant to carry out work tasks and function socially in the host country. All costs shall be itemised in sheet 3 of the budget template and documented to Norec on request.

International travel
Norec only covers the costs of international travel to a Norec training course and directly thereafter to the host country, and a return ticket home (either via a Norec training course, if applicable, or direct). Norec does not cover international travel back and forth between the home country and preparatory training courses prior to departure to the host country. The grant is calculated based on the lowest fare available on public transport and/or by air (i.e. economy-class airfare). It should be possible to change the tickets ("flexible tickets"). The grant must also cover the most reasonable mode of transport to and from the airport.

This budget line does not cover pocket money while travelling, as the participants must already have received their allowance or stipend for the month when the travel takes place.

Additional training by the partner organisation
Norec can cover up to five days' job- or context-specific preparatory training provided by the partnership. This preparatory training can be held in one of the partners' home countries, in connection with Norec's preparatory training or by the host partner. The rate should cover costs related to accommodation, facilitators and other costs related to the training.

Maximum rate for training in Norway: NOK 9,000/participant/week.

Maximum rate for training outside Norway: NOK 5,000/participant/week.

Longer preparatory training can be approved where this is justified.

Official travel and activities
This budget line may be used to cover the participants' in-service travel as deemed necessary by the host partner to carry out activities in the field to achieve the expected results. Norec does not cover public transport to and from the office under this budget line. This budget line must also cover any costs necessary for the participants to carry out the planned activities as presented in the overall project description.

The grant must cover the whole duration of the period abroad and the follow-up work at the home organisation after the exchange period abroad. Costs must be described in sheet 3 and documented to Norec on request. These costs must also be verifiable in the project audit.

Administration

Project coordinator — coordinating partner

The administration grant covers the following costs for the coordinating partner:

1) Administrative expenses of recruiting and sending, as well as preparing, mentoring and following up participants hosted by the organisation. Examples of costs include renting office space, accounting software, office accessories, copying, salary of accountant/contact person or other staff.

2) Salary and social insurance costs for a project coordinator. The coordinating partner is required to have an employed project coordinator for all projects with participants receiving stipends.

The amount on this budget line must be calculated based on the following percentages of total participant-related costs:

Project with participants receiving stipends		***Project with participants receiving allowances***	
Norwegian partners	25%	Norwegian partners	8%
Non-Norwegian partners	15%	Non-Norwegian partners	5%

Administrative support for other partners

This budget line shall be used to cover the same costs as those covered by the Project coordinator budget line for the organisations in the partnership that are not the coordinating partner.

The amount on this budget line must be calculated based on the following percentages of total participant-related costs (Cell Z20 in the budget template) for all partners:

Project with participants receiving stipends		***Project with participants receiving allowances***	
Norwegian partners	7%	Norwegian partners	7%
Non-Norwegian partners	7%	Non-Norwegian partners	4%

Maximum percentage of administrative support within the total budget

The total amount for administrative support for all the partners cannot exceed 20% of the total budget. Administrative support refers to the combined amounts of the grant for *Project coordinator – coordinating partner* and the grant for *Administrative support for other partners*.

Equipment
This budget line may be granted for procuring practical equipment necessary to facilitate the participants' work at the host partner, such as electronic office tools. All items purchased under this budget line are to remain with the host organisation after each round. The participants may not take these items home after the exchange period abroad. Smaller electronic items usually have a lifetime of around three years, which means that you may not apply for the same items every year. All costs must be documented and justified.

All partners receiving funding to cover equipment must have procedures for depreciation of equipment and keep inventory lists for all equipment bought for the project.

The maximum rate for this budget line is NOK 8,000 per partner receiving Norec participant(s).

Audit
This budget line must cover the costs of auditing the project. The partner organisations conduct local audits of the funds used. Based on these local audit reports, the coordinating partner conducts a consolidated audit of the project funds received from Norec. The audit must comply with the articles of financial administration set out in the collaboration agreement and these guidelines. The audit costs must be documented to Norec on request.

For Norwegian auditors, the maximum rate is NOK 20,000.

For auditors from any other country, the maximum rate is NOK 10,000.

Audit costs exceeding these rates can be applied for, with justification and documentation.

Partner meeting/midterm meeting
The grant is intended to cover the costs of the partners' annual meeting to review implementation, results, finances, administration and future development of the project. Midway in the project period, the partner meeting will be the mandatory midterm review with Norec.

For partners travelling to the partner meeting and midterm meeting, the grant is intended to cover economy-class airfare, accommodation costs and local meeting expenses for 1-2 persons. One of the partner organisations will normally host the partner meeting at their offices. This should rotate between the partners. Norec covers costs for maximum three full workdays, not including travel time.

The average maximum amount for each partner is NOK 12,000. This means that costs for one partner can be higher, but the total amount cannot exceed an average of NOK 12,000 per partner.

Other meetings with Norec
This grant is intended to cover travel costs to other training courses and meetings organised by Norec. Norec covers airfare at the lowest rate plus public transport from home to the airport. Meetings covered by this budget line are:

- Norec partner training (participation is obligatory in the first round of exchange for new Norec partners). For more information about the partner training, go to the section on training guidelines and requirements in these guidelines.
- Forums and summits organised by Norec
- Regional forums related to the Norec exchange

Norec will provide information on applicable meetings.

Transfer schedule
Enter the provisional dates you wish to receive the various transfers from Norec and the minimum amount required in the first transfer.

Funding for additional purposes (not part of a standard Norec budget grant)

Alumni meetings
If you have had a collaboration agreement for five years or longer, and you have a long-term plan for involving former exchange participants in your organisations and/or networks, you can apply for funding to cover the costs of an alumni meeting.

Visits home for participants with small children
This budget line can be applied for by submitting an updated budget including a written justification. It can only be applied for after recruitment of participants is complete. Eligibility criteria:

- The participant's child/children must be under 10.
- One visit is payable for participants intended to stay abroad on exchange for six months or longer.
- Two visits are payable for participants intended to stay abroad for longer than 10 months.

Norec only covers the travel costs.

Evaluations
The partnership can apply for funding to conduct an external evaluation of the project, e.g. by a consultancy firm or similar to assess the quality, achievements and potential for improvements to the project, by submitting a written request to the project's programme adviser. Eligibility criteria:

- The project has lasted longer than six consecutive years.
- The project has not been subject to any financial, administrative or implementation mismanagement.
- The formal request is justified, and the goals of the evaluation are described in detail.

Norec will consider funding parts of, or the whole, evaluation based on the formal request, the project duration, the number of participants and Norec's budgetary situation.

Participant supervision
The partners can apply for additional funding to follow up the participants during their stay abroad. The grant typically covers travel costs for the project coordinator of one of the partners to follow up participants hosted by another partner. It can also be used to supplement the salary costs of a staff member tasked with day-to-day follow-up of participants at one or more of the partner organisations.

Eligibility criteria:

- Small organisations with limited staff capacity and financial solidity
- Challenges have been experienced with the project administration and, consequently, the follow-up of participants hosted by one of the partner organisations has been reduced
- Large projects with 15 or more participants per round

The need for this grant must be justified.

Resource personnel
The partnership can apply for additional funding to cover costs of resource personnel (e.g. persons with a highly specific competence). This can be to assist the partners and the participants in implementing certain activities or facilitating certain workshops or seminars, or to otherwise provide an external competence for a limited period. To be eligible for this grant,

the applicant must provide a needs assessment and a justification. Documentation may also be requested by Norec.

The partnership can also apply for additional funds under this budget line to cover costs of resource personnel to assists participants with disabilities. Please contact your programme adviser to discuss this further.

Collaboration agreement amendment application

Template B03 must be used to submit an amendment application. It must be filled in, signed and submitted with all the required annexes.

In the amendment application, you must provide a short description of the situation leading to the need for an amendment. Any changes must have a logical connection to the needs assessment and the overall objective of the project, and must be properly justified.

If the amendment requires a budget revision, a financial report of actual expenditure so far in the project must be submitted with the revised budget. The financial report cannot be more than one month old.

If an amendment involves changes to the results framework, a revised results framework must be submitted with the amendment application.

If the costs of budget items in the round budget have changed significantly and you require additional funding to cover these costs, you must clearly state the change in cost and how much additional funding is required. An amended budget and financial report are required as annexes to the application, highlighting the new costs.

If an amendment involves changes in the configuration of the partnership, a revised results framework and overall project description must be submitted with the amendment application. If it involves adding new partners, the partnership must apply for, and complete, a feasibility study with the new partner before amending the existing agreement.

If the amendment relates to the number of participants or the duration of the exchange/follow-up period, a revised budget and financial report must be submitted with the amendment application.

Reporting

The partnership reports to Norec using the following templates:

- Round report (C06) or results report (C05)
- Financial report (C04)

One month before the final disbursement from Norec in each round, the partnership must submit a consolidated interim financial statement.

One month after the end of the participants' follow-up period, the partnership must submit the results/round report.

Four months after the end of the participants' follow-up period, the partnership must submit the consolidated financial report and audit report.

The reporting deadlines for round 1 will be specified in the agreement signed between Norec and the coordinating partner. For subsequent rounds, the deadlines will be specified in the round approval letters.

The coordinating partner is responsible for coordinating preparation of the reports and submitting them to Norec on behalf of the partnership. Reports submitted to Norec must be signed by the coordinating partner on behalf of the partnership.

The reports shall in general compare the planned activities and budgets for the round with the actual achievements and expenditure.

As stated in the collaboration agreement, reporting on the previous round must be submitted and approved by Norec before the final instalment for the current round is disbursed. If the reports are not submitted or do not fulfil Norec's requirements, Norec can withhold upcoming transfers.

The partnership must prepare a round report for the project after each completed round of exchange. After project completion, the partnership must prepare a consolidated results report. The round report provides a status on progress towards the expected results and the achievements of each specific round. The results report covers the whole project period and assesses whether the expected results have been achieved.

Round report

2. RESULTS SECTION

2.1 Project results

When reporting in this section, you must use the results framework that was approved by Norec for your overall project description. Report on the achievement in this round in the *Progress* column.

In addition, explain in a narrative text how the participants have been involved in the work that has led to the achieved results. If progress towards the expected results is not developing as planned, state how far you have come and the likelihood of getting on track for the final year. Unplanned results should be stated and reflected upon in relation to this year's achievements.

3. LEARNING IN THE EXCHANGE PROJECT

3.1 Participants

Focus on the new knowledge and competence gained by the participants and how the participants' skills have contributed to your organisations. Include short stories that illustrate changes in the participants during their exchange.

Also, include reflections on how the participants have been challenged regarding their cultural norms and understanding of gender roles and power relations while on exchange. Use the participants' reports, your own and colleagues' reflections and observations, as well as the homecoming seminars as your starting point.

In accordance with the EU General Data Protection Regulation (GDPR), use only first names when reporting, as the information will be stored in Norec's internal database and in the online public archive.

3.2 Partner organisations

Changes that you have observed in the organisations should be elaborated on in this section. As the partnership grows, you will find that knowledge and competence are exchanged between your organisations. Describe how this contributes to changes at organisational level.

6. PARTNERSHIP COOPERATION

When evaluating the cooperation within the partnership, focus on communication, decision-making procedures and sharing of responsibilities. See the section on reciprocity for more information.

Assess the financial procedures and control mechanisms within the partnership, including money transfers and payments. Consider whether the budgeting is cost effective. Give examples of areas for improvement in future rounds.

Results report (final report)

2. RESULTS SECTION

When reporting in this section, you must use the results framework and overall objective of the project approved by Norec. The report must reflect the achievements of the project period as a whole.

2.3 Sustainability of expected results

For Norec, it is important that the project creates new knowledge and leads to change that can be sustained in your organisation. Describe how the results you have achieved in the project will be utilised in the coming years.

2.4 Sustainable Development Goals (SDGs)

See the guideline section on the OPD. Briefly describe how your project has contributed to **each** of the SDGs you stated that this project would work towards in the OPD. General remarks on your work on the SDGs are also useful.

2.5 Youth participation

See the section on youth participation below. Describe how the project has worked towards giving young people authentic opportunities and contributing to their independence and inclusion.

5. PARTNERSHIP
See section on partnership cooperation in the round report guidelines above. In the final report, you should reflect on the cooperation within the partnership, including on financial management throughout the project period.

7. LESSONS LEARNT
Look back at all the rounds of exchange and describe how the challenges you have encountered in implementation of the project have enhanced the quality of the exchange project.

Financial report and audit statement

The financial reporting shall include:

- A budget analysis for each partner and the partnership (actual expenditure compared with budget, with notes and explanations as appropriate) in accordance with Norec's funding principles (see below)
- Transfer record for each partner in the partnership
- A record of Norec participants' duration of stay abroad (months) for each partner and the partnership
- A consolidated audit report (separate document; does not apply to the interim financial statement to be submitted one month before the final disbursement of the round from Norec)

Financial report (C04)
Currency and exchange rate
The coordinating partner must specify in the round financial report sheet the currency (NOK/USD), the actual exchange rates on the date of receipt for each partner and the total remaining balance in local currency.

Norec shall be informed of significant currency fluctuations which may hamper the implementation of the project. Norec strongly encourages partners to revise their budgets in the local currency regularly so that they are adjusted to reflect changes in the exchange rate.

Budget analysis
Norec's funding principles are stated in the collaboration agreement as follows:

- Norec's funding of the project is a grant based on estimated costs for each round of the exchange. Expenses above the total approved grant will have to be covered by the partners' own funds/other funding.
- The partners report on actual expenditure compared with the budget for each budget line.
- A weighted average of the exchange rate must be used in the financial reporting.
- Interest income and currency gains on the funds transferred from Norec or on the internal transfers between the partners shall be specified in the financial report and are to be repaid to Norec.
- Bank charges on the internal transfers between partners must be covered from the administrative grants.

There are certain acceptable limits of deviation for each budget line as follows:

- The total budget may not be exceeded without formal renegotiation (amendment).
- Deviations of +/- 10% on each budget line do not require comment (provided there is no change in numbers of Norec participants and the length of their contracts).

- Deviations of +/- 10-20% on each budget line are acceptable without prior approval by Norec (provided there is no change in numbers of Norec participants and the length of their contracts) but require an explanation in the financial report.
- Deviations of more than +/-20% on each budget line require prior approval by Norec (amendment).
- Funds allocated to participant expenses cannot be used for administrative costs.

Audit statement
The audit statement shall be submitted as a separate document and in accordance with the following requirements:

1. The auditor shall perform the audit in accordance with International Standard on Auditing (ISA) 805 and the other requirements stated below. The auditor must specify in the audit opinion if ISA 805 has been used. If ISA 805 is not used in the country in question, the auditor may use a similar national auditing standard.

2. The auditor shall submit the audited financial statement directly to Norec.

3. The audited financial statement must account for the total grant from Norec to the partnership. It is the coordinating partner's responsibility to collect and compile the audited financial statements of the other partner(s) in the partnership. The coordinating partner's auditor should review the other audit report(s) and evaluate whether the report(s) meet(s) Norec's audit requirements (as described in this document). Based on this evaluation, the coordinating partner's auditor will draw up the audit opinion for the compiled financial statement that has been submitted by the coordinating partner.

4. The audited financial statement must cover the entire project period of the round and state the agreement ID assigned by Norec. It must include an income and expenditure statement, and a balance sheet, using Norec's financial reporting format (C04). It is important that the approved budget and the accounts are directly comparable. Deviations from the budget should be commented by the auditor and explained by the coordinating partner/partner's management, in accordance with Norec's requirements.

5. The auditor shall submit a management letter detailing any findings made during the audit of the project.

6. All audits must be carried out by independent chartered/certified auditors.

7. The following key documents must be made available to the auditor, who must familiarise themselves with these documents and the accounting and audit requirements:

    - The collaboration agreement and project description
    - The round budget
    - Norec's guidelines on budgeting and financial reporting
    - Approval letter

8. The auditor must:
    - Verify that the coordinating partner and the other partner(s) satisfy the conditions laid down in section 9 of the collaboration agreement.
    - Verify that the funds have been used in accordance with the approved budget.
    - Verify that the coordinating partner and the other partner(s) have kept internal records of all petty cash and bank transactions

- Verify that the coordinating partner and the other partner(s) can document all expenditures by means of the original invoices/receipts (signed and stamped), confirming that the sum has been paid
- Confirm the amount transferred from Norec and ensure that it was received and recorded in accordance with the agreement
- Verify that entries for the project are valid project expenses and that invoices and receipts are only used once
- Confirm total costs, unspent funds and any currency gain or loss
- Specify the exchange rate used in each transfer for each partner

Physical inspection of the accounts of any partner may be conducted at any time by an audit company assigned by Norec, the Auditor General of Norway and/or Norec representatives. Below is an example of what an auditor's report from a project partner must contain, in addition to the financial report.

Part 2: Managing an exchange project

The results of your exchange project depend heavily on how you work as a partnership and how you work with your participants. As a representative of a partnership, you are responsible for doing your best to get the most out of the project on an individual, institutional and local community level. This chapter contains information gathered from many of Norec's experienced partners as well as from Norec staff. It contains recommendations as well as Norec's requirements of host and home partners. We hope it will help you to plan and run the exchange project successfully.

1. BEFORE THE EXCHANGE	• Recruit the participants • Sign participant contracts • Apply for visas/work permits in the host country • Provide safe accommodation for the participants • Purchase insurance/flight tickets • Sign up participants for Norec pre-departure e-learning and preparatory training courses and organise the partnership's preparatory training if applicable • Prepare the participants for the exchange • Prepare the participants regarding country-specific health, safety and security issues in the host country • Inform the participants of ethical principles and whistleblower routines • Prepare the workplace/colleagues for receiving participants • Write a work description for each participant • Assign a contact person/mentor for the participants at the host partner • Establish reporting and communication routines and channels within the partnership and with the participants • Sign agreements with all partners and draw up a transfer schedule for funds within the partnership • Establish routines for regular payment of allowance or stipend • Organise a working-language course at the host partner (if applicable) • Send participants on Norec preparatory training courses • Sign up for partner training (new partners/partner contact persons)
2. DURING THE EXCHANGE	• Register participants with the home embassy in the host country • Introduce participants to where they will be living and working • Familiarise participants with the work description and expected results • Brief participants on arrival on safety and emergency procedures (security briefing) • Mentor participants during the exchange • Communicate frequently with partners and participants • Monitor progress in the project against indicators and expected results • Prepare midterm meeting and partner meetings • Prepare and plan for the participants' reintegration and follow-up work in your organisation when they return • Sign up for Norec homecoming seminar
3. AFTER THE EXCHANGE	• Send participants to Norec homecoming seminar or make sure this is arranged within the partnership • Arrange meetings and notes to ensure a good handover from former to current participants • Conduct follow-up work and ensure transfer of competences to the home organisation • Assess the outputs and results of the exchange with partners and participants • Engage external authorised auditors • Submit narrative and financial report to Norec

Working in partnerships

Ownership, reciprocity and collaboration
A trust-based reciprocal relationship with equal ownership of the exchange project is critical in building an environment in which the partnership and the participants can work effectively towards the project's goals and expected results. The partners in the partnership also need to make sure that the project has the necessary support in the partner institution, from top management to employees.

Equal participation
The partnership needs to take a conscious approach to addressing inequalities between the partner institutions, and strive to ensure equal participation in decision-making, preparing applications and reports, and monitoring and follow-up of the project.

Communication and conflict resolution
All partners share equal responsibility for maintaining a good relationship. A high level of cultural sensitivity is important in this respect. During planning meetings, partners should address issues regarding how to solve conflicts and other situations where communication between the partners becomes difficult.

Hosting participants
Hosting participants is a key role in a Norec exchange. In many ways, the relationship between the participants and the host is a mentor-mentee relationship. Being a mentor means enabling a reciprocal and collaborative learning relationship, sharing common responsibility and accountability in achieving mutually defined learning goals.

Practical elements of an exchange project

Before participants' exchange period abroad

Distribution of tasks
Project-related tasks should be distributed within the partnership in accordance with the Partnership Agreement. When it comes to financial management, each partner must use accounting software that allows them to keep track of project funds. The coordinating partner plans the transfer of funds within the partnership in collaboration with the other partners.

Create a monitoring plan to outline how and when to measure indicators and results during the project period, and to make sure that the partnership is on track with the project.

Payments, allowances/stipends, accommodation and tax
The partners must agree on how allowances/stipends, accommodation and official travel/activities are to be paid during the exchange. No funds are paid directly from Norec to the participants. It is the responsibility of partners in collaboration with each participant to ensure that they follow national tax regulations. Accommodation costs are to be settled directly by the host partner. Transport costs to and from the office are to be covered by the participant. These should be incorporated in the allowance. See the section on budget guidelines in these guidelines for more information.

In countries in Asia, Africa and Latin America, employer's national insurance contributions payable by the employer shall be calculated based on documented national rates and actual payments. Explanations must be provided in sheet 3 of the budget template.

Provident fund contributions are usually calculated based on the participant's allowance. If the employer has to pay a fee for keeping the participant on the payroll, this shall be documented to Norec.

Taxes and pension paid by the organisations: projects with a Norwegian partner
For participants receiving their allowance from a Norwegian partner, the employer's mandatory national insurance contribution constitutes a percentage of the following budget lines: the main allowance, the pension fund contribution and the accommodation allowance. This will be 14.1% for most participants.

Pension fund contributions apply to all working residents of Norway, including non-Norwegian participants in Norway. A pension fund contribution is 2-15% of the monthly allowance, based on the participant's main allowance and accommodation allowance.

Documents, insurance, visas and residence/work permits
It is the partner's responsibility to ensure all legal documents (visas/work permits/passports/travel tickets/insurance) are obtained and all country-specific procedures are adhered to. This can include registration at local authorities, tax authorities or similar. The partners must make sure that the participants have all the necessary visas and permits, both for their stay in the host country and for their participation in Norec and partnership training courses.

Norec recommends that the partners familiarise themselves with the procedures for visas and work/residence permits and start the process(es) as soon as possible. Norec can issue invitation/confirmation letters for participants who need such documents as part of the visa application process. The embassy in the home country representing the host country will also be a good source of information. For Norwegian participants, information on most host countries is available at Landinfo.

Many countries have vaccination regulations for persons entering the country. Participants may need to present a valid international vaccination certificate showing they have received the prescribed vaccinations. The partnership is required to arrange for adequate local medical facilities for participants in the area/neighbourhood to which they are posted.

Prepare workplace
Inform colleagues about the content of the exchange project, the role of the participants and the partner's role as a host partner. The host is responsible for ensuring that the participants have office space and the necessary means/equipment to perform their work. This preparation can be carried out in collaboration with the participants and the home partner, as required and appropriate.

During the participants' exchange period abroad

Monitor the partnership's progress during the project
Are you achieving the expected results? Are adjustments to activities, tasks or assignments needed to achieve your expected results? Discuss and evaluate within the partnership and with the participants whether changes/improvements are necessary.

Norec
Norec staff will conduct project visits and midterm meetings. Partners and participants must be prepared to meet Norec representatives and present relevant documentation on request. The agenda for the midterm review will be similar to the one for partner meetings and will be decided in collaboration with your project's programme adviser at Norec.

Communicate any changes in your project to your contact person at Norec. Any changes regarding the following aspects must be communicated to Norec for prior approval: change of participants' length of stay, major budget deviations, changes in expected results and indicators, and change of partners involved.

Communication within the partnership
Regular communication within the partnership is extremely important for a successful exchange project. Progress and adjustments, follow-up of participants, administration of the project and other issues should be discussed openly.

After the participants' exchange period abroad

Reporting to Norec
Close collaboration between partners is needed when it comes to reporting, both narrative and financial. Each partner reports on their results, the role of the participants at their host organisation, partnership cooperation and learnings, as well as deviations that have occurred

during the exchange. The partners must engage an external authorised auditor to conduct project audits. See www.norec.no for reporting templates.

Evaluations
Evaluating the exchange project should be part of each partnership's monitoring system involving the partners and participants. Norec will conduct an evaluation of the project at the end of a collaboration agreement. Funding can be obtained for an external evaluation of the project. Any new agreements with Norec depend on the result of the evaluations.

Recruitment of participants

Participants must be recruited in accordance with the work tasks/activities/assignments described in the overall project description. The home and host partners must agree on the criteria for recruitment and selection of participants. All the organisations involved shall assess one another's candidates, i.e. the participants they will receive. Identifying the right participants is important; the success of your project depends on their success. The successful participant ideally possesses the right combination of professional and personal skills. Experienced partners recommend including the host partner in the selection process.

Norec has an age limit for participants (18-35). Exceptions can be made in certain cases but exceptions must be justified according to the needs of the project and discussed with your programme adviser.

Norec is expected to maintain an equal gender balance. All partners are therefore encouraged to design projects that are attractive and accessible to all genders, and to be gender sensitive during the recruitment process.

External vs. internal recruitment
Participants do not necessarily have to be permanent staff members. However, recommendations from evaluation reports and other assessments are unanimous: partnerships with internally recruited participants are more likely to reach their goals, and the long-term effects are stronger and the results more sustainable when the partners manage to "keep" their participants after the exchange. This is normally easier with internally recruited participants. Important changes happen when the participants continue to be a resource for the partners, as the new competence and knowledge learnt while on exchange stays within the organisation.

Personal qualities:

- *Willingness to learn as well as to teach*
- *Motivation and commitment*
- *Flexibility and adaptability*
- *Problem-solving skills*
- *Modesty and humility*

Professional qualifications vs. personal qualities
The professional qualifications required are specific to each exchange project and depend on the project content. There will always be a balance between a candidate's formal education/job experience and less measurable characteristics such as flexibility, adaptability and motivation. It may very well be that formal competences alone are not enough to succeed as a participant.

In addition, experience shows that some personal qualities are significant in identifying successful participants (see box).

How do you identify personal qualities?
The kind of qualities listed are seldom found on a CV and may be difficult to detect during an ordinary interview. One approach would be to present cases that describe a situation or dilemma that the participant is likely to experience during the posting, and ask how the candidate would address it.

Sign contract of employment with newly recruited participants
The contract of employment for exchange participants in a Norec-supported project must as a minimum contain the following items: (see box below)

Checklist for participant contracts

1. *Parties: names and signatures of participant and partner (employer)*
2. *Duration: specify start and end date of the contract*
3. *Legal basis: this is normally relevant national legislation, the partnership agreement between the partners, and the collaboration agreement between the coordinating partner and Norec*
4. *Details of termination: conditions of probation and dismissal according to national law*
5. *Allowance/stipend: specify the monthly allowance/stipend to be paid to the participant, when (date), to which bank account and in which currency.*
6. *Taxes and mandatory deductions: specify the deductions that will be made from the monthly allowance/stipend*
7. *Pension: include accrual of pension rights for the participant (if applicable)*
8. *Working conditions: details of working hours/days and holidays*
9. *Accommodation: specify the standard of accommodation to be offered to the participant, and which utilities will be covered by the host partner*
10. *The participant's tasks/duties: provide a concise list of the main tasks and duties the participant is required to perform, including attendance at Norec training courses and follow-up work*
11. *Insurance: details of the health and travel insurance the participant will have*
12. *Contact information: relevant contact details (telephone numbers, e-mail and postal addresses)*
13. *Annex: the host organisation's emergency plan*
14. *Annex: Norec's ethical guidelines*

The contract of employment for the exchange period shall be adapted to relevant national laws, standards and requirements, as well as to the specific nature of the Norec project, and recognise the interests of both the employer (partner) and the employee (participant).

If participants do not have a bank account, the partners must assist them in opening one and enter the bank account number in their contract (if payments are digital). It is the partnership's responsibility to ensure that participants have been paid all or part of their first day before their arrival at the preparatory training course. Regardless of which partner is the employer, the contract of employment may specify that the home partner is responsible for making payments regarding the allowance, including employment tax, pension fund contributions etc. The contract of employment shall specify that any taxation of the agreed allowance will depend on relevant national laws and/or any bilateral agreements between the sending and receiving countries. Whenever possible, the amount of tax that will be deducted should be specified in the contract. If this is not possible, the taxation percentage applicable in the country must be indicated.

Partners and participants should agree early on the timing of working hours and holidays, to make sure that these fit with work plans and the expected results of the exchange project. The terms and conditions of the holiday regulations in force in the host country shall apply. The participants should also observe the public holiday system of the host country and can, in dialogue with the host partner, include holidays from their own country, if relevant.

Sign up participants for Norec's training courses
Norec organises preparatory training and homecoming training for participants, and partner training for new contact persons at the partners. The coordinating partner is responsible for signing up all attendees for the training courses. In consultation with Norec, the partners will choose the time and place most suitable for the partnership.

Mentoring of participants

Before the exchange period abroad starts

Information for participants
It is important that participants are familiar with the content of all relevant documents regarding the exchange project. These include the project description, the project budget, the collaboration agreement, the contract of employment, the partnership's emergency plan and Norec's ethical guidelines. The participants shall be informed of any whistleblower mechanisms, and procedures on preventing and handling harassment. The partner is responsible for giving the participants adequate information on the exchange project.

It is important that the partners provide information on the partner organisations and the history of the partnership, and discuss the results of the exchange with the participants. Ensure a handover between new and returning participants in the project as a tool to facilitate the preparation of new participants.

The partners must inform the participants of country-specific issues such as health issues, cost of living, cultural dos and don'ts, transportation, special customs and nice-to-know matters. Experienced Norec partners recommend a Skype meeting/call with the participants and their future host partner before the exchange starts, to get acquainted, build trust and start clarifying expectations.

Prepare a monitoring and communication plan
Participants shall report regularly to both the host and home partners on progress, achievements and challenges in the exchange. It is up to the partners to decide on the frequency and the format of the reporting.

Take time to talk about personal challenges
Keep communication open with the participants, and talk about how the exchange period can affect their family and social lives, what they can expect from you and what you expect from them.

Health issues
Ensure that the participants have had all the necessary vaccinations.

Develop a work plan for the follow-up work on return from the period abroad
The work plan for the follow-up work can be drawn up while the participants are abroad. The work plan provides predictability about what the participant is expected to do on returning from the exchange period abroad and will be helpful for planning the return to the home partner. It should be drawn up in collaboration with participants and the host partner.

Contact person and mentor
Assign the participant a contact person at the host organisation for work-related issues. It is also important that the participant has a mentor and/or cultural broker who can facilitate integration into a new culture. The contact person and the mentor should not be the same person.

Develop a work plan for the period of exchange abroad
The work plan provides predictability and direction in accordance with the planned project results. The work plan should be drawn up in collaboration with participants and the home partner.

During the exchange

Introducing participants to the workplace and tasks
On arrival, host partners must have a plan for introducing the participants to the workplace and their tasks.

Communication
Enable frequent communication with participants and the host partner on tasks, transfer of competence at the host partner and planning of follow-up work at the home partner, based on the mentoring and communication plan. Feedback from the participants should be considered in developing the project and for potential development of your organisation. Using these reports as a tool to develop the participants' skills is another important part of being a mentor.

Brief participants on country-specific safety issues
On arrival, all participants must be briefed on safety issues and the emergency plan. All participants and partners should have a copy of the emergency plan available, and it must be updated regularly. The plan contains contact information for embassies and hospitals, and specifies who has responsibility for what in case of emergency. Partners should also brief the participants on general and specific safety issues in the host country and the host city/area on arrival. The information shall enable participants to practise safe behaviour when it comes to areas to be avoided, safe means of transport, handling valuables, dress codes etc.

Registration in host country
On arrival, all participants must be registered with the embassy, the local authorities and/or police. The host partner is responsible for helping the participants to register. The purpose of registration is to enable the embassy/consulate to assist participants in an emergency situation.

Language course
The host partner is responsible for signing up participants for a language course or finding a qualified language teacher if applicable.

Planning for mentoring of participants
A plan for follow-up and mentoring of participants must be drawn up. A mentoring plan can consist of regular meetings, at which tasks, professional development and integration in the workplace are discussed. Feedback on job performance must be given on a regular basis.

Planning for transfer of competences
A plan for transfer of competences from the participants to other staff shall be drawn up, providing time to discuss methods and ways of working, and to share knowledge on specific subjects and other aspects.

Social and cultural integration — at work and in the community
It is important to help the participants with social and cultural integration at the workplace and in the community. The host partner is responsible for helping the participants to integrate socially. An important aspect of this is introducing participants to social arenas in the community. The host partner must also assist participants in understanding local culture and customs by acting as a cultural broker.

Maintain open and regular communication with the participants to ensure they are coping well emotionally at work and in their free time.

Mapping of participants' skills and personal goals
Partners should follow up on the recruitment phase and map participants' skills in collaboration with each individual. By clarifying the participant's personal goals, expectations can more easily be adjusted. The work plan developed before the exchange must be adjusted in collaboration with the participant. Tasks must be adapted to the expected results of the project and the work plan adjusted to the participant's skills, competences and knowledge.

From individual to institutional learning
The host partner is responsible for implementing relevant learning from the participants at institutional level. This could be new working methods, new knowledge or a change of priorities. The success of the exchange depends on bringing individual learning to institutional level, and using this to build institutional capacity.

Provide support in emergency situations
The host partner is responsible for their participants' safety during the period abroad. Specific persons at the host partner may be assigned specific responsibilities during an emergency, as outlined in the emergency plan. Participants should be familiar with the emergency plan. This plan should provide information on whom to contact and what to do in case of emergency.

If emergency assistance is needed during the posting abroad and the participant cannot be assisted by the partner or others as specified in the emergency plan, Norec can be contacted for assistance. Norec can help to put the participant in touch with a doctor or other healthcare worker who will follow up the case. It is stressed that this arrangement applies to emergency assistance only and must not be used for routine consultations.

After the exchange period abroad

During follow-up work
As well as being part of the progress towards achieving the expected results, a key element of the follow-up work is transferring competences from the individual exchange participant to the home partner as an institution, and to relevant networks outside the institution or to the wider community/society. It is important that the partner takes on a mentoring role for the returning participants, to better facilitate the transfer of competences. Norec recommends that the mentor for the participants you have hosted is also the mentor for the participants returning to your organisation. Experienced partners recommend making use of former exchange participants as facilitators for the follow-up stage of the project.

After follow-up is complete
Partners should establish communication routines to keep participants involved with your organisation and in the project after reintegration and follow-up work. This is to create a network of former participants, who can be an important resource for the project and new participants. This can also help you understand how the knowledge and skills acquired are put into use after the end of the exchange.

Information concerning participants from Norway

Notification of move abroad
Norwegian participants are required to notify their move abroad and move back to Norway to the national register in their home district. A form is provided for this purpose and is available at Skatteetaten.

Allowances
When deciding where payment of allowances is to take place, partners should be aware that the decision might have consequences for the participant's right to membership of the National Insurance Scheme (Folketrygden). See information in the section below and/or contact NAV.

Holidays
No modification from the Holiday Act/Holiday Regulations of the relevant country may be made in an employee's disfavour, unless it is specifically laid down in the Act/Regulations that a modification may be made. The Act/Regulations should provide for matters such as the length of holiday, holiday period, and calculation and payment of holiday pay.

Pensions
Norec grants funds towards pension schemes as detailed in the specific round budget. The Mandatory Occupational Pensions Act came into force on 1 January 2006 and provides a summary of the employer's obligations, the employee's rights and the minimum legal requirements for pension schemes. The Act means that most employers must have an

occupational pension scheme for their employees. Employers who already have a pension scheme must ensure that it satisfies the Act's minimum requirements. The Act does not apply to employers who have pension schemes in accordance with legislation or tariff agreements for government or local-authority employees. The Mandatory Occupational Pensions Act only applies to participants receiving their allowance from their home partner.

Norwegian participants spending more than 12 months out of Norway who want to retain their membership of the pension scheme under the National Insurance Scheme (Folketrygden) must apply for voluntary membership. Participants may have to pay extra costs, as the contribution rates for voluntary membership vary depending on whether tax is paid in Norway and whether the employer is required to pay employer's contributions in Norway. See also the section on the National Insurance Scheme below.

Participants employed in the Norwegian public service and working at least 14 hours per week are required to be members of the Norwegian Public Service Pension Fund. The Fund entitles members to full disability and dependents' cover for as long as they are employed, and gives entitlement to a contractual pension, disability and dependents' pension, on leaving the public service if they have served for at least three years (deferred entitlement). Employees who have previously accrued qualifying time in the Norwegian Public Service Pension Fund will continue accruing qualifying time during their term on a Norec-funded project. Any subsequent public service appointment will give the same entitlement to accrue qualifying time.

For many participants, the commitment to the employer will be restricted solely to the term of the project. Certain categories of employees are exempted from compulsory membership of the Norwegian Public Service Pension Fund, but this does not apply to participants. Provisions in the Pensions Act for individual exemptions from compulsory membership apply exclusively to individuals employed for a term of less than three years who have not previously been members of the Fund, and who are covered by another, equivalent public service pension scheme. This exemption will not be generally applicable. Any application for exemption from membership of the Norwegian Public Service Pension Fund must be made by individuals themselves to ensure that they are fully apprised of which entitlements will be lost if exemption is granted.

Please note that compulsory membership may also apply in the municipal or private sectors.

More information on the Norwegian Public Service Pension Fund is available (also in English) at www.spk.no/en.

Membership requirements as mentioned above apply only to participants receiving their allowances from their home partner.

Tax

Participants will normally pay tax — to the home country, the host country or both. This must be determined by participants themselves and/or the partners, by contacting the home tax authorities (Skatteetaten) and local tax authorities.

More information on tax is available from the Norwegian Tax Administration.

National Insurance Scheme

In order to take out insurance through Europeiske Reiseforsikring (or equivalent), the participant must normally be entitled to a compulsory or voluntary membership of the National Insurance Scheme during the stay abroad (membership of the health component of the National Insurance Scheme for voluntary members). Alternatively, a higher premium can be paid to the insurance company.

Partners and participants should be aware that Norwegian citizens spending more than 12 months outside Norway lose their automatic (compulsory) membership of the National Insurance Scheme (Folketrygden).

All partners should contact NAV Internasjonalt to check whether participants are compulsory members of the National Insurance Scheme, or if they need to apply for a voluntary

membership. Compulsory membership depends on the time spent abroad, and whether the partner pays a National Insurance contribution in Norway or the salary is paid by a foreign employer.

Participants who spend more than 12 months outside Norway therefore need to apply for a voluntary membership if they want to continue to be members. Depending on the circumstances, this may also apply to participants who spend only six months abroad.

For participants receiving their allowance from their home partner and spending less than 12 months abroad, membership of the National Insurance Scheme *may* be compulsory during the stay abroad. NAV Internasjonalt can answer any questions regarding compulsory and voluntary membership of the National Insurance Scheme. Please see also Arbeid I utlandet — Medlemskap I folketrygden.

Participants must complete the form Application for membership of the Norwegian National Insurance Scheme during residence outside Norway (in Norwegian only) in order to retain membership of the National Insurance Scheme (voluntary membership). This membership incorporates all chapters of the Norwegian National Insurance Act and automatically entitles participants to extended cover for some health services during postings abroad.

It is imperative that participants submit their applications in good time before departure. Participants can obtain detailed information from NAV Internasjonalt regarding their rights and obligations. Persons granted a tax exemption by their tax office on income earned abroad should still send the form to NAV so that it can collect the contribution, which would otherwise be deducted together with the tax.

The home partner should be cited in the application as the participant's representative in Norway. If the participant earns taxable income during the posting abroad, the home partner will receive a giro for payment of the National Insurance contribution on a quarterly basis. In this way, the home partner functions as a link between the participant and NAV.

During residence outside Norway for voluntary members, the contribution is paid to NAV. NAV will be able to provide additional information regarding alternative forms of cover and National Insurance contribution rates for voluntary membership.

Voluntary membership lapses when participants return to Norway. On their return, participants once again become compulsory members of the National Insurance Scheme in their municipality of residence. For more information, see NAV Internasjonalt — Arbeidstaker I utlandet and NAV Internasjonalt — Sjekkliste — Arbeidstaker I utlandet.

Reimbursement of medical expenses
Claims for reimbursement of medical expenses abroad should as a rule be sent to the Health Economics Administration (Helsenorge). Reimbursement is based on production of receipts. The National Insurance Scheme only covers bills that have been paid, and not those sent directly from a doctor/hospital abroad.

Participants should submit any claim through the home partner, who will endorse the claim form. The home partner undertakes to advance the expenses for participants posted abroad. The home partner may subsequently submit a claim for reimbursement to the National Office for Social Insurance Abroad/NAV Internasjonalt.

The deadline for submitting a claim is six months from the date the bill was issued. Claims submitted more than six months after the date of issue will be rejected as being out of date.

It is extremely important that the partnership obtains confirmation that participants are members of the National Insurance Scheme in good time before departure.

The National Insurance Scheme’s regulations on covering costs due to illness while abroad are available at Helsenorge.

Insurance
The partnership is required to take out medical/health and travel insurance for each participant. The partners decide which insurance provider to use. The insurance policies must be valid in the host country.

Some insurance providers may offer combined policies, e.g. Europeiske Reiseforsikring (ER), which has a participant-specific policy that includes both travel and medical/health insurance. The partnership should make reference to Norec when taking out insurance with ER. The terms and conditions will be provided with the insurance certificate.

Other insurance
If applicable, all employers are required to insure their employees in accordance with any act relating to industrial injury insurance.

Registration of residence with the Norwegian embassy/consulate
Norwegian participants are required to register their residence in the host country with the country's Norwegian embassy/consulate. The purpose of registration is to enable the embassy/consulate to assist participants in an emergency situation, e.g. the need for evacuation. Registration should be completed on https://www.reiseregistrering.no/.

The embassy/consulate will also in certain cases be able to assist with repatriation as a result of serious illness or accident. The responsibilities of the embassy/consulate are limited to what is stated on the Ministry of Foreign Affairs' national sites. Norwegian embassies have their own websites with contact details and other practical information. See www.norway.info for a summary.

Information concerning participants going to Norway

Residence and work permits in Norway
Under Section 6, subsection 24 of the Norwegian Immigration Regulations, work permits for up to four years may be granted to participants employed by Norec's Norwegian partners in accordance with Norec's statutes. The Regulations specify that applicants shall return to their home country on completion of the contracted term of employment, and that the circumstances at the time of application are consistent with return.

You will find more information on how to apply, requirements, processing time and other questions regarding residence and work permits on the website of the Norwegian Directorate of Immigration. It is important to apply well in advance of intended departure. Note that connecting flights in countries outside the Schengen area may require participants to have airport transit visas. This must be checked well in advance of departure.

Persons applying for a visa are required to produce documentation showing that they are covered by travel/medical insurance. As a rule, applicants are required to take out insurance in their country of ordinary residence. If this is not possible, the applicant must seek to take out insurance in another country. The insurance can also be taken out by the host organisation, in which case the insurance should be taken out in Norway.

The insurance must be valid for all Schengen countries with minimum cover of EUR 30,000. Documentation of the insurance must be produced at the time the visa is issued. This means participants are not required to have insurance cover from the time the application is made, but at the time the visa is issued.

Participants do not have the option of undertaking paid part-time work alongside the work performed as a Norec-funded participant. Participants have a work permit valid for full-time work for a single employer. For up-to-date information, see Norwegian Directorate of Immigration.

Participants in health projects: authorisation to work in this sector in Norway is subject to stringent requirements. For a Norec project, participants have the status of visiting employees under supervision, and do not work independently within their profession. State authorisation

as a health sector professional is therefore not required to work as a participant in Norway. Participants are not entitled to use any of the professional titles cited in Chapter 9, Paragraph 48 of the Health Personnel Act. The participants are otherwise covered by the provisions of the Norwegian Health Personnel Act.

Arrival in Norway
Following Norway's ratification of the Schengen Agreement, participants will most likely have to change aircraft in another country within the Schengen area before coming to Norway. This means that there will be limited opportunity for the host partner to be present and clear up any potential misunderstandings at passport control, in countries within the Schengen area. It is therefore important that the participants carry with them all the essential and correct documentation before entry into the Schengen area. Essential documentation includes details of the place of residence in Norway and contacts including telephone numbers, as well as the contract of employment, passport and tickets. The documentation must be in English.

All participants should be met at the airport on arrival in Norway. In addition, the partner contact person should send a mail in advance of arrival to *Grensekontrollen* (Border Control), Gardermoen police station, e-mail: bcp.osl@politiet.no, to notify

- the participant's name, and that the person is travelling to Norway as a Norec participant
- date, time and flight number
- name of referee/contact person and telephone number

This is particularly important in cases where communication can be difficult due to, for instance, language barriers.

Alien registration
Participants from the South must present themselves at the local police station for registration within seven days of arrival in Norway, bringing their passport and residence and work permits for Norway. More information can be found on the website of the Norwegian Directorate of Immigration. It may also be necessary for participants to register with their home embassies in Norway.

Participants who are staying in Norway for more than six months must register in person with the National Population Register within eight days of arrival in Norway. The form RF 1401-Notification of move to Norway from abroad must be filled out and brought along, together with passport and residence permit. The Population Register may ask to see other original documents. A national identity number will be provided when the Notification of move to Norway from abroad has been approved. Further information on the National Population Register may be found at www.taxnorway.no.

Everyone working in Norway must have a tax deduction card. The tax deduction card shows how much tax your employer should deduct before you are paid. All participants must attend the tax office in person and identify themselves before an ID number and a tax deduction card will be issued. Further information on tax and tax deduction cards may be found here. An application should be made for a tax deduction card for foreign citizens (http://www.skatteetaten.no/upload/Skjemaer/alltid/RF-1209BE.pdf). Bring official ID (passport) and a contract of employment to the tax office.

The Labour Inspection Authority, the Police, the Directorate of Immigration and the Tax Administration have established a joint Service Centre for Foreign Workers, but their services cannot be used by participants. Participants must therefore contact the individual agencies.

See www.norway.info for a list of Norwegian embassies and consulates, as well as facts about Norway and information on Norwegian history, culture and society.

New in Norway will help participants to become familiar with their rights, opportunities and obligations after receiving a work permit in Norway. The menu on the right of the page contains

a number of links to information on useful topics and to relevant public agencies. Remember to select Labour migrants.

Allowances
To set up a Norwegian bank account, the participant must obtain a national identification number (ID number/*personnummer*) from the National Population Register in Norway. Setting up a bank account and receiving a bank card may take some time.

Holidays
The Holidays Act/Regulations cover matters such as the length of holiday, holiday period, and calculation and payment of holiday pay. The terms and conditions of the Norwegian Holiday Act apply to all participants posted in Norway. Any holiday should be taken by agreement with the host partner, in conformance with the provisions of the Holiday Act/Regulations.

Pensions
Participants accrue normal pension entitlements in accordance with the regulations of the National Insurance Scheme.

The Mandatory Occupational Pensions Act came into force on 1 January 2006 and provides a summary of the employer's obligations, the employee's rights and the minimum legal requirements for pension schemes. The Act means that most employers must have an occupational pension scheme for their employees. Employers who already have a pension scheme must ensure that it satisfies the Act's minimum requirements. The Act does not apply to employers who have pension schemes in accordance with legislation or tariff agreements for government or local authority employees. Read more about mandatory occupational pensions here.

Participants employed in Norwegian public service organisations and working at least 14 hours per week are required to be members of the Norwegian Public Service Pension Fund. The Fund entitles members to full disability and dependents' cover for as long as they are employed, and gives entitlement to a contractual pension, disability and dependents' pension, on leaving the public service if they have served for at least three years (deferred entitlement). Employees who have previously accumulated qualifying time in the Norwegian Public Service Pension Fund will continue accumulating qualifying time during their term with Norec. Any subsequent public service appointment will give the same entitlement to accumulate qualifying time.

For many participants, the commitment to the employer (host partner) will be restricted solely to the term of the project. Certain categories of employee are exempted from compulsory membership of the Norwegian Public Service Pension Fund, but this does not apply to participants. Provisions in the Pensions Act for individual exemptions from mandatory membership apply exclusively to individuals employed for a term of less than three years, who have not previously been members of the Fund, and who are covered by another, equivalent public service pension scheme. This exemption will not be generally applicable. Any application for exemption from membership of the Norwegian Public Service Pension Fund must be made by individuals themselves to ensure that they are fully apprised of which entitlements will be lost if exemption is granted.

More information on the Norwegian Public Service Pension Fund is available (also in English) at Statens pensjonskasse. Please note that compulsory membership may also apply in the municipal or private sectors.

Tax
Persons who receive a salary or other allowances from a Norwegian employer while temporarily resident in Norway are liable for tax in Norway. The allowance paid to participants by the host partner counts as salary for tax purposes.

Participants will normally pay tax —to the home country, the host country, or both. This must be determined by participants themselves and/or the partners, by contacting the Norwegian

Tax Administration (Skatteetaten) and the home tax authorities. More information on tax is available from the Norwegian Tax Administration.

Participants who become resident in Norway for tax purposes should include all payments from the employer to cover subsistence, accommodation and visits home in their gross taxable income when applying for a tax deduction card.

Tax liability under Norwegian legislation may be limited by rules laid down in taxation agreements with other countries. Participants will, as a rule, be covered by the taxation agreements Norway has with several countries. A list of countries with which Norway has taxation agreements is available here. The various agreements limit the application of Norwegian tax legislation in different ways. Most taxation agreements contain legislation governing tax liability to the country in which the employment takes place (source taxation).

Pay for work that is carried out in Norway for a Norwegian employer is always liable for tax in Norway. If the person concerned is resident abroad for tax purposes, the country of residence must ensure that double taxation is avoided in accordance with the provisions of the relevant taxation agreement. If there is no taxation agreement with the person's country of residence, whether and how double taxation is to be avoided rests with the domestic legislation in the person's country of residence.

More information regarding tax position may be obtained from the Norwegian Tax Administration. Participants are required to file a tax return with the Norwegian tax authorities. The tax return shows an overview of the individual's financial circumstances, and a tax assessment showing income, other financial circumstances and the calculated tax. The obligation to file income tax returns applies irrespective of whether the tax liability under Norwegian legislation is limited by a taxation agreement. The income tax return must be submitted to the tax office that issued the tax card (see the section on Arrival in Norway).

The host partner is required to report salary and other allowances paid to participants to the Norwegian tax authorities, including accommodation costs ("naturalytelse"). This applies irrespective of whether the participant is liable for tax in Norway.

The tax office in the municipality of residence will be able to provide more detailed information regarding tax legislation.

National Insurance Scheme
Anyone resident in Norway or working in Norway for a specific employer is subject to compulsory membership of the National Insurance Scheme. Since the host partner will have formal employer's responsibility for the participants, the participants will be compulsory members of the National Insurance Scheme, with the same entitlements as Norwegian nationals.

In the case of national insurance queries, participants should refer to the local National Insurance office in their municipality of residence.

The host partner should obtain confirmation that the participants are members of the National Insurance Scheme. Further information on membership of the National Insurance Scheme is available here.

Supplementary insurance
In addition to the cover provided by the National Insurance Scheme, the host partner is required to take out supplementary medical/health and travel insurance for each participant. The partners decide which insurance provider to use. The insurance must be valid in the host country.

Some insurance providers may offer combined policies, e.g. Europeiske Reiseforsikring (ER), which has a participant-specific policy that includes both travel and medical/health insurance. The partnership should make reference to Norec when taking out insurance with ER. The terms and conditions will be provided with the insurance certificate.

Other insurance
The host partner must take out statutory industrial injury insurance for participants to cover their stay in Norway.

Health
There are no special health or vaccination requirements in Norway for non-Norwegian nationals granted work and residence permits. However, the person concerned must not be evidently in need of treatment prior to entry. Other requirements regarding vaccinations may apply to the country where Norec and partnership training courses take place.

All participants are obliged to contact the district health centre where they are to reside as soon as possible after their arrival in Norway so that they may be tested for tuberculosis. Participants who will be residing in Oslo and Akershus should be referred to the Diagnostics Centre (*Diagnosestasjonen*) at Ullevål University Hospital. The examination comprises a general medical investigation for tuberculosis, a Pirquet skin test and a chest X-ray. Participants who hold a vaccination card from their home country are asked to bring this to the examination, together with their passport. Please note that participants are required to return for a further examination approx. three days after the first. The district health service may also request additional medical checks depending on the participant's country of origin.

As members of the National Insurance Scheme, participants will have identical rights to Norwegian nationals in relation to health and medical facilities. The "Regular GP" scheme gives everyone living in Norway the right to have a general practitioner as their primary care doctor. The host partner should enquire with its county medical centre to find out whether it is possible to locate GPs to suit the participants in terms of language and cultural awareness.

The patient's own or another general practitioner is the initial point of contact during office hours. If the condition is serious and there is a need for a doctor outside normal hours, the emergency medical service must be contacted. The emergency medical service will also refer the patient to hospital if necessary. Admission to hospital is free of charge for members of the National Insurance Scheme. A fee must be paid to the emergency medical centre, even if you are admitted to hospital. All participants should familiarise themselves with the national number of the emergency medical centre (*legevakt*): 116117. When you call this number, you will be routed to the nearest emergency medical centre in your area. You can only call this number from a Norwegian phone number. If emergency/urgent medical help is needed, call 113.

Certain specialists may have very long waiting lists. Most medicines may only be obtained on prescription and a fee must be paid for consultations with a doctor or the outpatients department at a hospital, as well as for medicines.

Charges for dental care are not covered by the National Insurance Scheme and must be paid by the individual.

Part 3: Useful information

Results-based management

This section outlines how the concepts of results-based management are applied in Norec's projects and provides practical information relevant for filling in the results framework.

Needs assessment: The needs assessment is normally the rationale for the project. The more precise the information on the scale and nature of the problem (the needs), the easier it will be to define the expected results, and to determine the extent to which changes have occurred and the effects for the target group. The needs assessment should be directly linked to the results framework.

Completing a SWOT analysis for each organisation in the partnership can be a useful tool for filling in this section. The SWOT analysis is a classic strategic planning tool originating from business and marketing analysis, which encourages groups (or individuals) to reflect on and assess the Strengths, Weaknesses, Opportunities and Threats of a strategy and how it can best be implemented. Contact your programme adviser for more guidance on how to do a SWOT analysis.

Theory of Change (ToC): A theory of change is a complementary instrument to the results framework. It is the vision you have for the change(s) you want to achieve. It explains the logic of your intervention and how, together with others, you will contribute to achieving your envisioned change. It can be helpful to have one for the project. Within the framework of a Norec-supported project, it will be useful to base the project's ToC on Norec's ToC.

Inputs: A project's inputs are the financial, human and physical material or resources that are invested in a project. Within the framework of a Norec-supported project, the inputs are the sum of the resources provided by Norec and the partners. This includes the grant and courses provided by Norec and the partners, the hiring of the participants, and the partners' contributions of, for instance, staff time, office space and additional financial resources.

Two levels of results:

Output results

Outputs are the products and services (deliverables) that arise as direct, short-term results of the project activities, i.e. the participants' assignments and tasks.

Within the framework of a Norec-supported project, activities completed by the participants and partners are equivalent to the immediate outputs of their work. The outputs will be new knowledge, skills and abilities for individuals in the partner institutions and/or their target groups. The outputs can also be the establishment of new routines, strategies or working areas in the institution, or a completed campaign or event. These are highly tangible results for capacity-building projects such as a Norec-supported project. Results such as new routines and strategies can easily be tracked back to the knowledge and skills that have been exchanged in the partnership.

Examples of output results:

- Renewable Energy Ltd has been certified in accordance with the ISO Environmental Management standard
- The multinational staff of International IT Ltd have increased their level of satisfaction with the leadership team's management
- Agriculture Norway AS and Agriculture India Limited have improved their collaboration on cultivation of vegetables
- Environmental NGO has enhanced its potential to access funding from regional and local donors
- Municipality Greentown has established collaboration with relevant research institutions on compiling reports on local environmental status
- Ecological NGO has strengthened its advocacy work for production of organic food

- Members of Better Health Network have enhanced their capacity in project management and human resource development
- Staff at the maternity ward at Frisk hospital are confident in dealing with patients with an immigrant background from South Asian countries

Outcome results

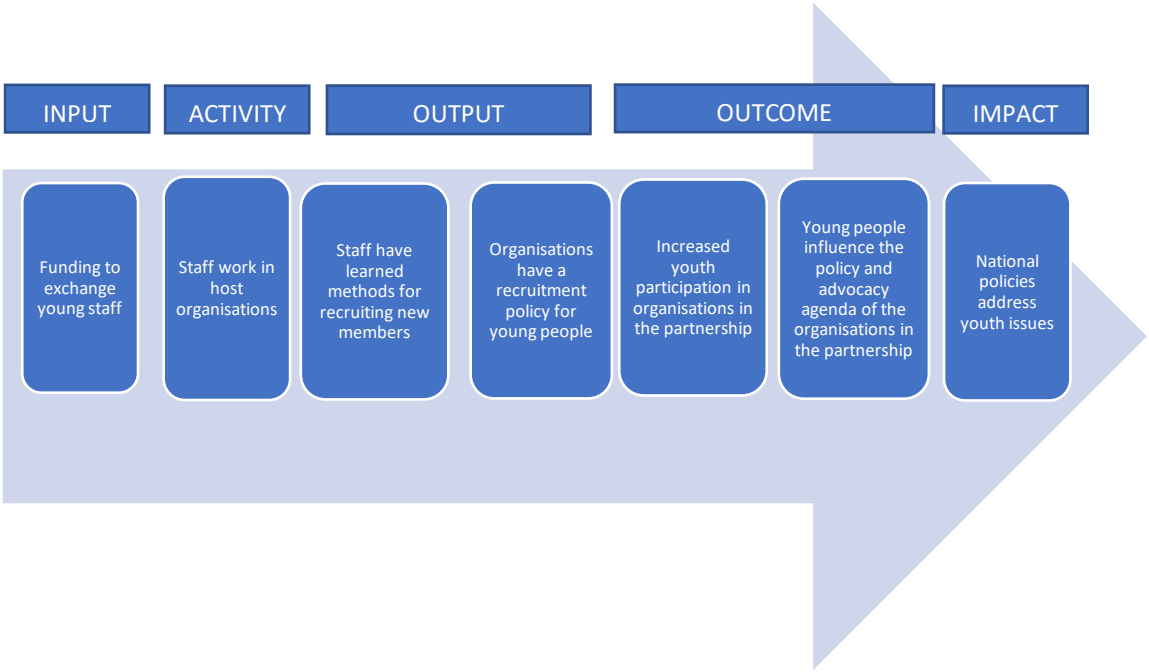
Outcome results are medium-term effects achieved by an intervention's outputs for the partners and/or the project's target group. These can be changes in behaviour, politics, presentation or accomplishment of work. The change should be for your target group or those who you see as your users. Outcomes are the wider institutional and/or societal effects of the outputs produced by the exchange participants and project partners. Expected project results (outcomes) are usually planned and reported for a project period of three to five rounds. A perspective of one or two rounds may also be relevant.

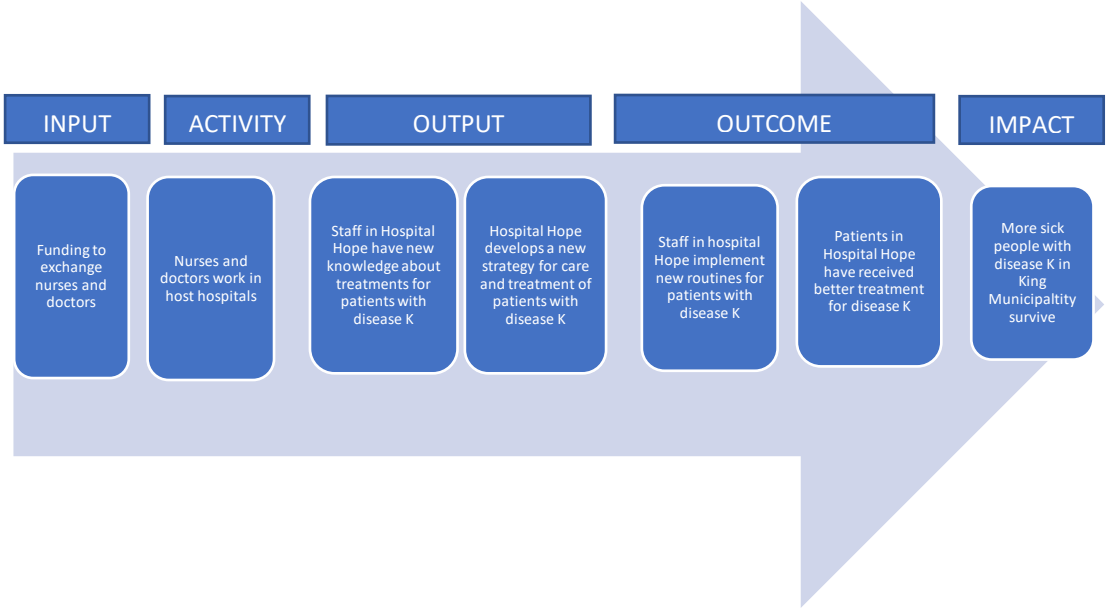
Examples of outcome results

- More inhabitants in Little Town are setting up small-scale businesses
- The pupils at secondary schools in Little Town are implementing their knowledge of waste disposal systems at home
- Municipality Big Town is implementing a climate change adaptation plan
- Patients with cancer at Hope hospital are receiving services in line with national standards
- People in Green Hill and Big Forest local communities have access to preventive health services provided by community structures
- Patients with tropical diseases at Up hospital are receiving improved treatment

Tips for formulating good expected outcome results:

- WHO will be reached: Start the phrase with the target group of the project.
- WHAT change will be achieved: Describe (only) the new positive situation (the change) that you would like to see for the target group at the end of the project period. Avoid the words "through" and "by".
- WHERE: Indicate where the change will be achieved.





How to fill in the results framework

A results framework is a detailed structure for measuring results. It is often, but not necessarily, a table or a matrix. A good results framework should include expected results at the different levels along the results chain — outputs, outcomes and impact. The starting point for defining expected results is a description of the current situation, often referred to as the problem analysis/baseline.

Expected result: A result is a describable, measurable change in state or situation due to the cause-and-effect relationship brought about by an intervention (exchange of young people). Results are consequences of the activities (tasks and assignments) carried out by the participant to achieve certain changes. The expected results should be clearly linked to the needs assessment and the overall objective for the project. You should develop at least three expected results at output and/or outcome level. An expected result should describe the change(s) that your organisation wants to achieve through this project. Expected results may also be defined for the partnership as a whole.

Results should be SMART:

- Specific: presents the desired change, the target group, the region/area, etc.; distinct and clearly stated (not vague), to avoid differing interpretations
- Measurable: involves quantitative and/or qualitative characteristics, to monitor and evaluate progress
- Appropriate: responds to specific and recognised needs or challenges ("relevant"), contributes to the overall objective and within the mandate of your organisation
- Realistic: achievable with the financial and human resources available
- Time-bound: by when the expected result shall be achieved

Indicators: An indicator is not an activity, but a variable that measures one aspect of a project and the planned results. The indicator should be linked to the baseline value and the target set. Develop 2-4 indicators per expected result.

Indicators should measure the result(s) you want to achieve and provide evidence that a result has been achieved. An indicator is a success criterion that helps evaluate objectively whether an expected result has been achieved. An indicator also verifies whether an intended change has occurred. Indicators are variables that help to track progress over time and measure the degree of results achievement. Indicators are normally quantitative (number, frequency, percentage, ratio) but may also be qualitative (observations, views, assessments). The indicators should allow for disaggregation when appropriate and possible. Disaggregation means breaking down information to a more detailed level, for instance by gender, age, income

group, disability, or any other category of interest. Disaggregation enables analysis of results for specific target groups. Disaggregation of information at the project level is, for instance, key to implementing the "leaving no one behind" objective of the SDGs.

A good indicator is also SMART:

- Specific: stated in clear and simple terms
- Measurable: can be measured in qualitative or quantitative terms
  a) Quantitative indicators: direct or statistical (numerical) indicators
  b) Qualitative indicators: indicators that reflect people's judgements, opinions and attitudes towards a given situation or subject. Quality may be measured both through quantitative indicators as well as surveys of the users' assessments, i.e. how they perceive the quality of the services
- Achievable: realistic to measure, given the financial and human resources available
- Reliable: consistently measurable; different observers who measure in the same way will get the same result
- Timely: measured at time intervals that are relevant and appropriate in terms of programme goals and activities

Remember: the indicator shall verify planned results and not describe an activity in the project.

Baseline values are established to define the current status for each indicator. This should be defined from the outset (or as early as possible) to enable a comparison with the target as progress is made, and to track progress over time.

Targets are the expected or desired values for each indicator at some point in the future. They are defined to give a sense of the magnitude of the expected changes and will serve as a benchmark for assessing the level of progress made. Targets should be defined as soon as possible, for example after conducting a baseline study. You set the targets you want to achieve (per year, if applicable). This will make it easy to show progress. You will report on the progress after every round of exchange, unless you have specific targets set for each round.

How to measure and/or Data source of verification: Describe how your indicator will be measured and the sources of information you will use to assess each indicator.

When to measure: Indicate the frequency with which the indicators will be measured.

Summary of activities: List the main planned tasks, assignments and activities the participants will carry out while abroad and on return to the home organisation. Do not list all tasks, assignments and activities. Remember that it must be the tasks and assignments carried out that lead to the specific mentioned expected results. The latter should secure the transfer of knowledge from the participant to the organisation. This will ensure that you achieve the expected results.

How organisations learn

Learning, building capacity and sharing knowledge are at the core of an exchange project. According to Norec's theory of change, mutual exchange of young people can stimulate learning and sharing across borders. Norec expects its partners to be willing to learn from their project participants and their partner organisations.

Being a "good learner"

The following measures are often present in organisations that are "good learners":

- Cross-structural meeting places: organisations that are good learners often have different places where information is shared, across teams and organisational structures. Meeting places can be virtual or physical
- Collaboration with mentors: new employees and participants work with experienced colleagues, to observe how tasks are solved. A lot of implicit knowledge might be transferred between the two
- Decentralised and horizontal communication channels (across hierarchy): quick and informal communication makes it easier to share ideas and knowledge

- Digital databases: store, analyse and compare new data with older data, and make it easier to share knowledge that is accessible to all
- Systematic training of employees: organisations that are good learners also have a capacity-building strategy for their employees and regularly provide training for new and experienced employees
- An organisational culture based on mutual respect and care: organisations that are good learners put a lot of effort into building a positive organisational culture, which creates confidence between participants, colleagues, and between employees and employer

Learning from your partner organisation(s)
Partners in an exchange project can learn a lot from one another. The following should be considered:

- Is the partnership based on trust?
- Are you open to listening to the other partner's (partners') ideas and experiences?
- Will you consider new ideas, experiences and changes for your own organisation?

Learning from the participants
Participants can both learn from and teach their peers, colleagues, mentors and contact persons in the organisations. To facilitate this, the relationship between participants, contact persons and close colleagues should be based on trust, willingness to learn and listening.

The participants must be given time and space to contribute with their knowledge.

Youth participation

Norec emphasises young people (anyone aged 18-35) in its projects. This is exemplified by the upper age limit of 35 for participants in Norec-supported projects. Young people are a substantial worldwide demographic group that in many places has limited access to possibilities, work opportunities and decision-making processes. The world is full of competence and skills. Norec believes that young people are resource persons, that they are the leaders of tomorrow and of today, and that they must be given a space to influence their context.

Norec seeks to support projects aiming to improve the situation for young people in their organisation and/or in the target group the organisation serves. To ensure appropriate youth participation in your project, you should ensure the following components are in place:

1. Authentic opportunities: The participants and/or target group (if young people) must be given real-life responsibility and genuine opportunities to make decisions or influence processes in the project. To this end, the partners must provide a platform for genuine influence and real-life responsibility for the participants and the target groups.

2. Independence and inclusion: The participants must be given the space to set the agenda and influence project-related decisions. They are not only tools for you as partners but must be understood as active contributors to the project.

3. Recognition: The participants must be recognised as persons with interests and opinions. The same applies to the project's target groups. They must be given a voice and be listened to. Your participants and your target group are a valuable resource for the project and must be recognised as such.

4. Information: To be able to influence and to make good decisions, the participants must be given information in a relevant manner. Sharing project documents and strategies is essential to achieve this. Furthermore, this ensures shared ownership of the project with the participant and the target groups, which in turn sets the stage for better project implementation.

Reciprocity

Reciprocity is a core value for Norec. A reciprocal – or mutual – partnership means that everyone in a partnership contributes to and benefits from it. All parties are equal in a mutual partnership. Every actor has a say in processes and decisions that affect them. As partners, you must work together to shape the project and its goals, recruit and follow up participants, and maintain transparency with respect to budgets and the allocation of resources. You set your own goals, but as partners you commit to helping one another to achieve them.

We know that reciprocity in a partnership develops over time. The trust that emerges leads to the sharing of responsibility, ownership of one another's results and a shared understanding of the challenges. Reciprocity fosters respect, highlights each party's contributions and ownership of their own objectives, and allows people to participate in the development of their own society.

Training guidelines and requirements

Norec is a competence centre for exchange cooperation and will actively support project partners and exchange participants with courses and guidance. Norec shall deliver high-quality training that supports Norec's overall objectives. This chapter contains detailed guidelines for participant and partner training.

About Norec's participant training

Norec structures its exchange programmes so participants can contribute to professional development both during the exchange and after they return home to their own community.

Training courses are designed for active participation and use a range of learning methods to increase the motivation to be a change actor and stimulate reflection. In this way, we ensure that everyone involved reflects on the exchange cooperation and puts it in a global context. Norec also aims to enhance learning and the transfer of knowledge between individuals and the organisational level.

To ensure the quality of participant trainings, the default is in-person training, supplemented by digital courses.

Participant training cycle

Norec's participant training is a compulsory supplement to the partner's own training. After recruitment, the home partner is responsible for proper onboarding of participants. The minimum requirements are described in Part 2: Managing an exchange project.

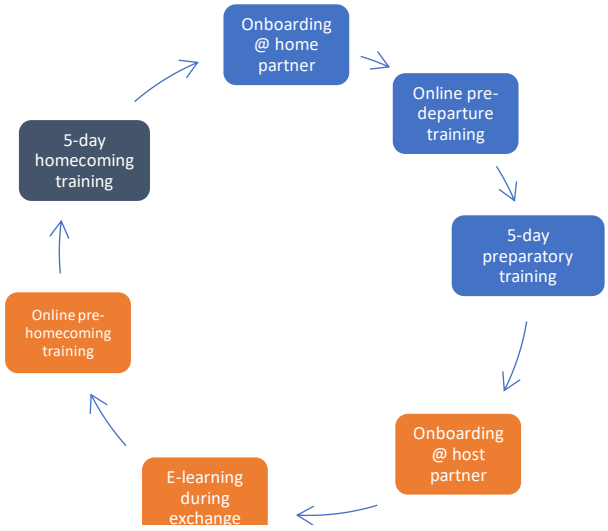


Figure 1. Participant training cycle

The partner must register the participant no later than six weeks prior to the preparatory training. Upon registration, the participant will receive a short online e-learning course to prepare them before they travel to attend the five-day training.

Upon arrival, the host partner is responsible for further "onboarding". The minimum requirements for this are described in Part 2.

During the exchange, Norec offers optional e-learning training to all participants via its digital learning platform: participants.training.norec.no.

The home partner is responsible for registering the participant for homecoming training no later than six weeks in advance of the training. Upon registration, the participant will receive a short online e-learning course that should be completed before the five-day training.

Overall training plan

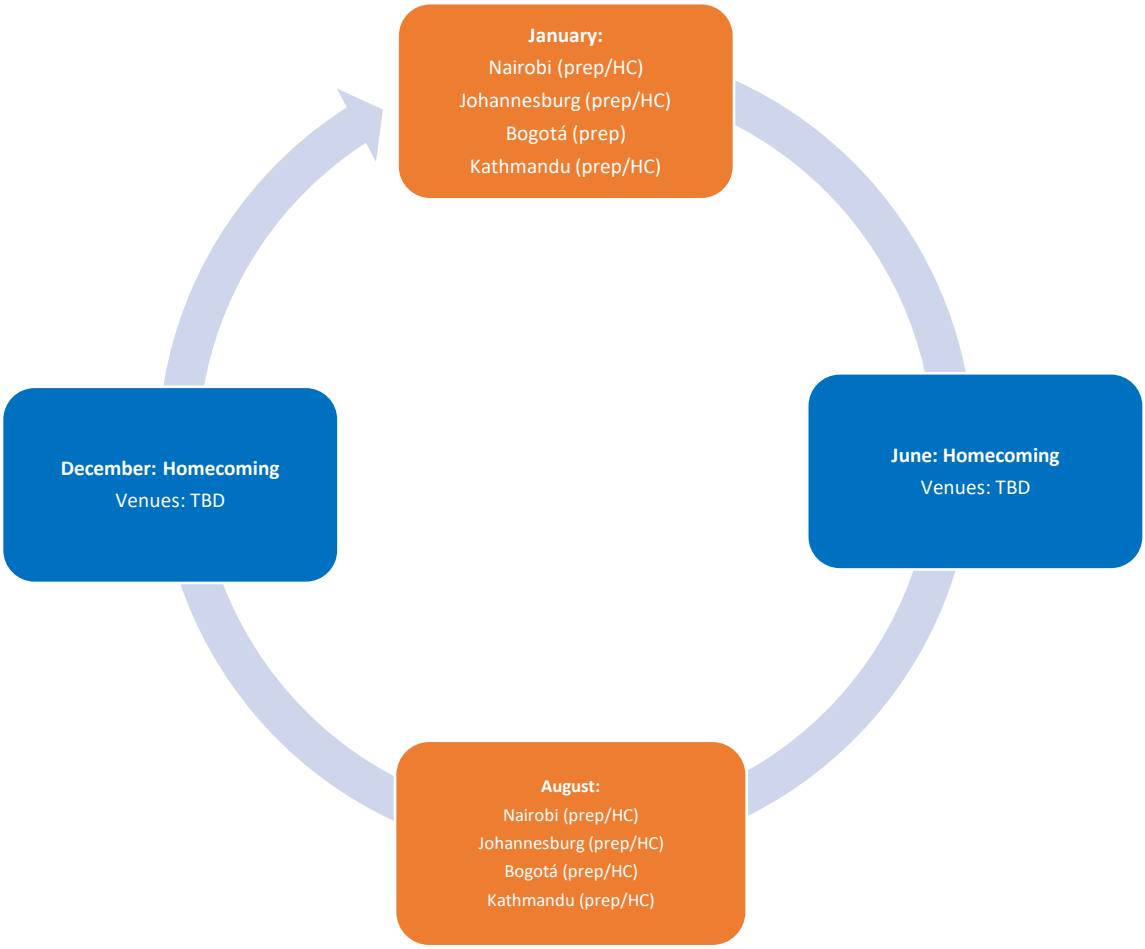


Figure 2. Training plan for participants

We schedule preparatory training twice a year, in January and August. All exchanges shall start with preparatory training, which will take place in Johannesburg, Nairobi, Kathmandu or Bogotá. Digital alternatives are provided in February and September for participants who miss out on the in-person training. We aim to let all participants in a partnership attend the same training, provided this is justified from an environmental perspective.

Homecoming training is offered in parallel with the preparatory training in August and January. To accommodate other lengths of exchange, we also offer homecoming training in June and December (currently planned to be online). Our schedule of dates and venues will be published well in advance on Norec's website.

Norec training overview

The following gives an overview of the framework and intended learning outcome for each training course conducted by Norec. Detailed learning objectives for each training course can be found on Norec's website under Training.

Norec's preparatory training

The main purpose of the preparatory training is to clarify the role of the Norec participant, to prepare the participants for their stay abroad and to show them how they can contribute to the sustainable development of their project.

Description	• The training consists of two parts. • An online **pre-training** module taken 2-4 weeks before the participant leaves their home. • A 5-day **preparatory training course** on site or online before or shortly after they join their host.
Participants	• All Norec exchange participants. Max. group size: 20 online or 40 on site.
Duration	• Pre-training can be completed within 1 day. • The preparatory training is 5 days. If on site, add 1 day for arrival/1 day for departure.
Budget	• Board and lodging is covered by Norec. • Travel costs are funded through the CA budget and must be covered by the partner. • Extra nights before/after the training must be covered by the partnership. • For online training, each partner organisation is responsible for ensuring participants have access to stable internet and a suitable venue for the training.
Training venue	• The participants attend on-site training at the location that minimises travel costs and CO_2 emissions. • The on-site training is offered in Bogotá, Kathmandu, Johannesburg and Nairobi. • If travel is restricted, or for other valid reasons, the training will be offered digitally via Norec online training platform
Registration and deadlines	• Norec will send out a registration link to the partner 3 to 4 months in advance of the training. • The partner must register the participants 6 weeks before the training starts. • Norec confirms attendance to the hotel no later than 4 weeks before the training starts. • Shorter deadlines may apply if the training is digital.
Staff and facilitators	• The training is conducted by Norec staff with assistance from external facilitators and a local logistical supplier. Former participants may be engaged as volunteers.
Frequency	• Preparatory training is offered twice a year, in January and August. • Digital alternatives are provided in February and September. • Norec will be flexible

Intended learning outcome.	• After Norec's preparatory training, participants will
	  ○ Understand their role as a Norec participant
	  ○ Understand how they can promote sustainable development at individual, organisational and society level through their programme
	  ○ Understand the personal and professional challenges related to living and working in another cultural context
	  ○ Be able to identify and use specific tools and approaches to prevent, minimise or overcome challenges related to living and working in another cultural context.

Modules and learning objectives	• Details of modules and learning objectives will be notified to partners and participants upon registration.

Norec's homecoming training

The purpose of the homecoming seminar is for participants to identify and articulate new learning and competences acquired during their exchange, and discuss how they can share these results and new competences when they return home. Personal challenges related to reintegrating are also addressed.

Description	• The training consists of two parts. • An online **pre-homecoming** module taken 2-4 weeks before the participant leaves the host partner • A 5-day **homecoming training** either on site or online.
Participants	• All Norec exchange participants about to return to, or who have recently returned to their home countries at the end of their exchange. • Max. group size: 20 online or 40 on site
Duration	• Pre-homecoming: 2 hours to 1 day. • Homecoming training: 5 days. If on site, add 1 day for arrival and 1 day for departure.
Budget	• Board and lodging is covered by Norec. • Travel costs are included in the CA budget. • Extra nights before/after the training must be covered by the partnership. • If the course is completed digitally, each partner organisation is responsible for ensuring the participants have access to stable internet and a suitable venue for the training.
Training venue	• The 5-day preparatory training is offered in Bogotá, Kathmandu, Johannesburg and Nairobi. • The participants will attend training at the venue that minimises travel costs and CO_2 emissions. • If travel is restricted or for other valid reasons, the training may be completed digitally via Norec online training platform
Registration and deadlines	• Norec will send out a registration link to the partner 3 to 4 months in advance of the training. • The partner must register the participants no later than 6 weeks before the training starts and provide travel details about 1 month before. • Shorter deadlines may apply if the training is digital.
Staff and facilitators	• The training is conducted by Norec staff with assistance from external facilitators and a local logistical supplier. Former participants may be engaged as volunteers.
Frequency	• Homecoming training is offered in January, June, August and December.

Intended learning outcome.	• After Norec's homecoming training, participants will:
	  ○ Be able to identify, articulate and present new learning and competences from their exchange.
	  ○ Be able to reflect on and discuss how they and their project have promoted sustainable development at individual, organisational and society level.
	  ○ Be aware of challenges related to homecoming and reintegration, and be able to identify and use strategies to prevent, minimise or overcome these challenges.

Modules and learning objectives	• Details of modules and learning objectives will be notified to partners and participants upon registration.

Additional training provided by the partner organisation
All partners are responsible for appropriate onboarding of the exchange participants. These requirements are described in Part 2.

Some partners have additional training needs for training their participants. This training should be relevant to the partnership, the job or the context in which the participant works.

Each partnership can apply for additional funding for such activities. The following should be included in the collaboration agreement application or round application.

Description of the training	Describe the topics the training will cover, who will participate, venue, length of the training and who will facilitate the training. *Example: The partnership will have a 2-day meeting after the preparatory training in Nairobi for all new exchange participants. The purpose is to provide an in-depth introduction to the digital tools used for online guidance counselling in our project. We will also give the participants a security briefing, since we are working in potential risk areas. The training will take place at Hillside Hotel and be facilitated by two of the project coordinators.*
Budget	Explain the calculations used to arrive at the budget. *Example: The training brings together 10 persons for 2 days. The daily rate is NOK 1000 per participant for 2 days. In addition, 2 persons from the partnership will attend as instructors. Travel costs are NOK 10,000. The daily rate for the facilitators is NOK 1000, for 3+3 days. In total, we are applying for NOK 36,000.*
How this training will enhance the project's expected results	Here the applicant should give a short description of how this training will enhance the project result. *Example: The project uses several digital tools to reach out with online counselling in Uganda and Kenya. This corresponds with results no. 1 and 3.*
Intended learning outcome of the training	Describe what skills you expect the participants to have after the training. Try to be specific in the objectives. *Example: After the training, participants will be able to:* *Use tool X as a working tool to reach out to remote clients online.* *Understand how to address technical difficulties the client may experience.* *Understand the risks involved in working in risk areas in Nairobi and Kampala, and how these risks can be mitigated.*
Environmental considerations	Describe what measures have been considered to reduce the environmental footprint, e.g. reducing travel by arranging the training digitally or other logistical measures. *Example: We have considered doing the training digitally, but it is an advantage to gather all the participants under the same roof in order to learn from one another's context. The training will take place after the preparatory training to avoid unnecessary travel. Two instructors will travel from Uganda to Kenya.*

Norec's partner training

Norec offers introduction seminars for prospective partners, training for coordinators as well as networking arenas and other professional training to develop our partners.

The Norec introduction seminar

Norec arranges introduction seminars for everyone who applies for a Norec-supported project. This seminar is mandatory for all prospective partners and is an important part of the feasibility study – along with partner visits.

Description	Compulsory seminar for all partner organisations as part of their approved feasibility study. All the partners from one project will attend the same seminar. The seminar is conducted on site or digitally.
Participants	1-2 representatives from each partner organisation. 1-4 partnerships per seminar. Up to 20-25 delegates is the recommended maximum for in-person training. Digital introduction seminars are conducted per partnership via Norec's digital learning platform.
Duration	3 days. For on-site training, add 1 day for arrival and 1 day for departure. The digital introduction seminar is conducted over 3-4 half-day sessions.
Budget	Board and lodging is covered by the Norec training budget. Travel costs and per diem are covered by the feasibility grant. Other travel costs, e.g. extra nights, must be covered by the partners themselves.
Venue	We hold the seminars in Bogotá, Kathmandu, Nairobi, Johannesburg and Norway. Other venues can be considered, depending on the countries in which the partnerships are based, if there are cost and environmental benefits.
Frequency	One introduction seminar at each venue per year. The training is announced on Norec's website and by invitation.
Norec staff	1-2 facilitators from Norec per seminar is recommended, depending on size of group.
Modules	Being a Norec partner Roles and responsibilities Planning a Norec project Financial management principles Recruitment and leadership
Intended learning outcome	After the Norec Introduction seminar, participants will: be inspired and motivated to continue planning a Norec exchange understand the Norec model, its principles and values understand the crucial factors for a successful exchange project be able to design a project within the Norec framework.

Norec's partner training

After your organisation has entered into an agreement with us, we will ensure that key personnel are trained.

Description	Norec's partner course is mandatory for all new partner coordinators in the Norec exchange programme. The training should be completed during the first year. If you replace key personnel along the way, we will also offer training for new staff.
Participants	Partner coordinators. Key persons in the project (e.g. managers, accountants) may also attend the training. 1-2 representatives from each partner organisation. Up to 25 delegates.
Duration	5 days on site, shorter if held digitally. This training is under review in 2021.
Budget	Board and lodging costs are covered by the Norec training budget. Travel costs are covered by the CA grant.
Venue	Bogotá, Kathmandu, Nairobi or Johannesburg. Other venues can be considered, depending on the countries in which the partnerships are based, if there are cost and environmental benefits. If travel is restricted, the training will be conducted digitally via Norec's training platform: partner.training.norec.no
Frequency	One training course at each venue per year.
Norec staff	1 training officer and 1 programme adviser
Modules	Norec: The model, principles and values A Norec partnership in practice: Framework and financial principles The participant: recruitment, preparation and follow-up during and after the exchange Organisational learning, mentoring and transfer of knowledge Global understanding.
Intended learning outcome	After Norec's partner training, participants will: be inspired and motivated to coordinate a Norec exchange understand the Norec model, and be able to apply its principles and values be able to design, organise and report on a project within the Norec framework understand the crucial factors for a successful exchange project, and be able to incorporate this understanding in the implementation of their project be able to analyse how their own project may be understood in a global development context, and how it may contribute to the UN Sustainable Development Goals.

Other partner training:

Norec also arranges meeting places for partnerships in order to inspire, guide and create learning. Norec facilitates such training to strengthen the project results. Scheduled training events are publicised through partner mails and on our website.