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Planning, Structuring, Pre-Approval and Global Evaluation of Humanitarian Aid Projects

MEXICAN TECHNICAL TABLE FOR HUMANITARIAN AID PROJECTS FOR 143 COUNTRIES

International Project Director of System of Integral Humanitarian Development Projects (249 I AM Corporation) in 249 countries around the world

## PROJECT SUMMARY SHEET

Country: Department/Province: -----

Municipality:

Date: (day) \_\_\_\_ (month) \_\_\_\_\_ 2025

The following contents are the minimum that a public, private, or social investment project must contain to be submitted, without prejudice to any additional contents that comply with the Methodological Guidelines of the Citizen Renewal Corporation.

The information provided is for guidance purposes only. It should be analyzed and weighed based on the context and specific case to be applied.

### 1. BASIC INFORMATION

1.1 - Name of the organization preparing and submitting the project.

\_\_\_\_\_

1.2 - Project name (no more than 15 words): \_\_\_\_\_

\_\_\_\_\_

1.3 - Address, telephone number, and email address of the organization:

\_\_\_\_\_

1.4 - Associated institutions: \_\_\_\_\_

Associated institutions may include community councils or associations, neighborhood associations, improvement committees, a mayor's office, a planning office, a productive association, a social work legal entity, a member of a trade union, or an NGO, foundation, cooperative, SME, church, sports or artistic-cultural association, etc.

1.5 - Name of the person(s) responsible for the project:

### 2. DIAGNOSIS AND CONTEXT

Conduct a basic diagnosis of the current situation regarding your project's topic and the social, economic, territorial, population, environmental, cultural, ethnic, gender, etc. reality of the area and the people where the project will be developed.

Insert or place a map showing the geographical location of the project and any other images that you consider illustrative.

Provide only information about a particular municipality or type of project in a maximum of 3 to 4 pages, as an example or general overview of the problem the project will address.

### 3. FORMULATE THE PROBLEM

Starting from a need, which is a negative situation we want to change, in this section, you should present WHAT OR

WHICH IS THE PROBLEM that the project will address based on the following questions:

**WHAT?** This is the most specific definition of the project's topic, after having an "idea" of it. This answer should define what the project wants or can achieve to solve a problem or change a situation.

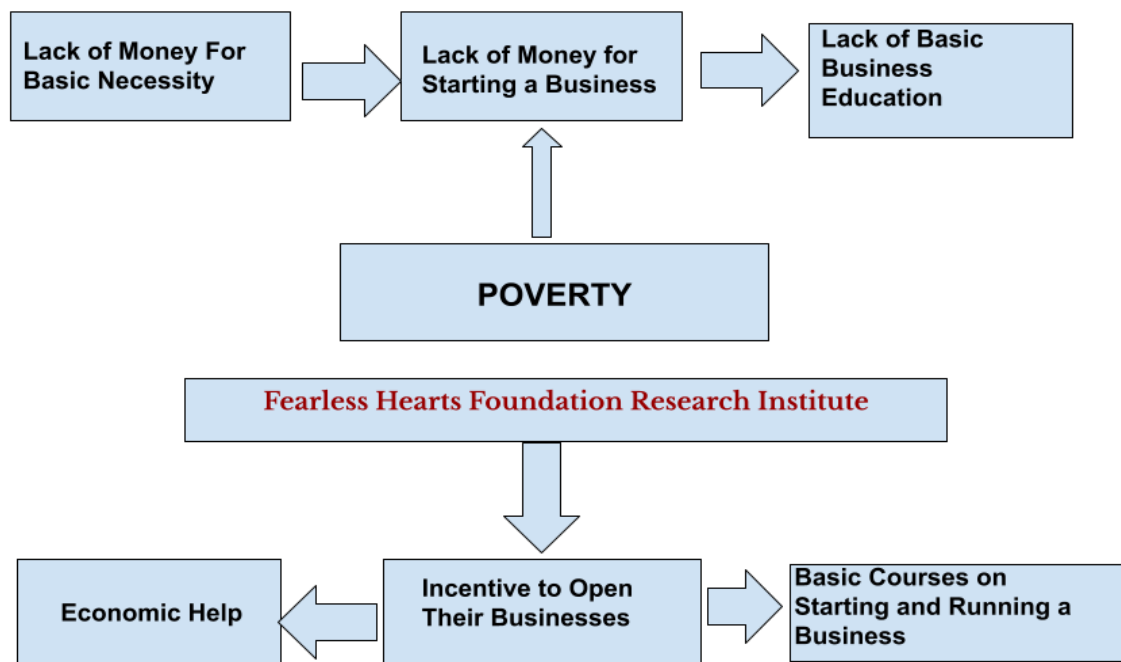
**WHERE?:** This is the location where the project will be developed.

**WHEN?:** This refers to the execution time. It should start from year 0 (start of the project) to the final year (3, 5, 10, or more), depending on available resources.

**WHO?:** A matrix of stakeholders must be developed. The people who will receive the benefit and the executors, who will participate in the project's implementation, must be identified.

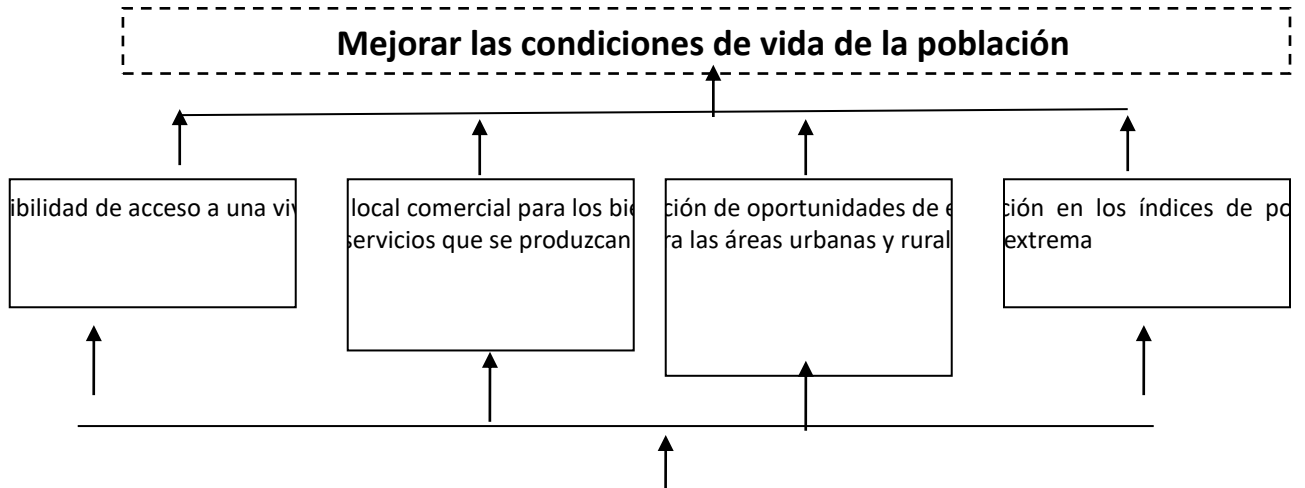
To draft this section, **USE WHAT YOU WILL INDICATE IN YOUR PROBLEM TREE.**

#### PROBLEM TREE (example)



3.1 ALTERNATIVES **TREE OF OBJECTIVES (Example)**

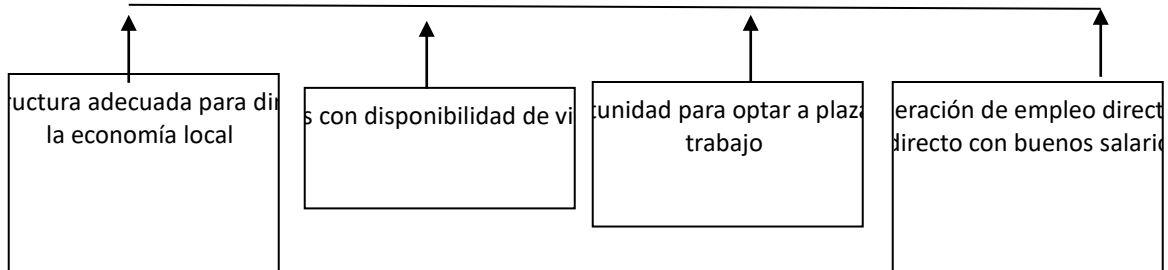
**PURPOSES**



**OBJECTIVE**

Disponibilidad y acceso a viviendas de bajo precio

**RESOURCES OR MECHANISMS**



It is what is proposed to do with the project to solve the problem and the diagnosis and context explained above.

**4.- PROJECT RECIPIENTS OR BENEFITED POPULATION**

Directly benefited population, understood as the group to whom the actions are directed and those who PARTICIPATE and receive the benefit.

WHO? The people who PARTICIPATE AND ARE EXECUTORS IN THE PROJECT must be identified.

**DIRECTLY BENEFITED POPULATION (IN TERMS OF DIRECT JOBS TO BE CREATED)**

POPULATION	MEN	WOMEN	CHILDREN	OTHERS (which one)

(If you have other information, you can change the table or open columns or rows.)

The number of direct beneficiaries is calculated as follows:

The number of direct jobs needed to execute the project (executive, administrative, office, field, technical, middle management, supervisors, monitors, skilled and unskilled labor, assistants, auxiliaries, operational, security personnel, etc.) multiplied by the average number of family members in the country. For example, considering the year 2022, this is 5.6 members, minus one unit, because it will be the worker in the direct jobs.

Example: construction of 300 homes, 356 direct jobs times 4.6 family members = 1,638.1

#### 4.1 BRIEFLY DESCRIBE THE CHARACTERISTICS OF THE DIRECTLY BENEFITED POPULATION

According to their socioeconomic status, occupations, trades or professions, type of vulnerability (displaced, deported, poverty, unemployment, disabled, or other characteristics of vulnerability or exclusion), and explain the type of benefit they receive.

#### 4.2 BRIEFLY DESCRIBE THE CHARACTERISTICS OF THE INDIRECTLY BENEFITED POPULATION

According to their socioeconomic status, type of vulnerability (displaced, deported, poverty, unemployment, disabled, or other characteristics of vulnerability or exclusion), and explain the type of benefit they receive.

#### INDIRECTLY BENEFITED POPULATION

POPULATION	MEN	WOMEN	CHILDREN	OTHERS (which one)

**NOTE:** The average number of indirect beneficiaries in a municipality in the sample country is entered (total population divided by xxx municipalities), and this number is calculated as the final figure of indirect beneficiaries per municipality at a maximum of 28%.

If the project will be carried out in several municipalities, the figure of 28% of an average municipality in the country is multiplied by the number of municipalities in the project.

This should be formulated taking into account the title. If well designed, it should include an infinitive verb (ar, er, ir) and respond to the (what, how, when, why, and for what).

#### 5.2. SPECIFIC (3 to 5 maximum)

This is the general objective, but broken down or distributed into several more specific objectives. They show how the project will be developed.

## 5. OBJECTIVES

### 5.1. GENERAL (1 or 2 maximum)

The y must be measurable through quantities, data, time, etc.

### 5.3.- GOALS OR RESULTS TO BE ACHIEVED (2 or 3 for each specific objective)

These are drafted according to the specific objectives.

They must be stated as a number or percentage, taking the number of people who receive the benefit as a starting point.

The activities required for the execution or fulfillment of each goal or result are derived from the goals or results.

They must consider the physical, human, financial, logistical, and other resources required during its implementation.

## 6.- JUSTIFICATION

This refers to the "WHY?", that is, the importance of the project.

We should ask ourselves: WHAT HAPPENS IF THE PROJECT IS NOT CARRIED OUT?

The regulations and laws that justify the project can be included.

How the project will contribute to solving the problem to be addressed or to the diagnosis or context and problem that makes it necessary to be implemented in the country or those municipalities.

## 7. INCLUSION OF THE PROJECT IN DEVELOPMENT PLANS

The project must be included in the Municipal, Departmental, Provincial, or National Development Plan, indicating the theme, axis, objective, area, or, if possible, the Public Policy to which it can be included or related.

## 8. OPPORTUNITY

This refers to the external factors that enable the development of the project. In most cases, it is the shared responsibility between the project and the administrations at the municipal, departmental/provincial, or national level of government.

As well as the corporate values, such as justice, social and gender equity, environmental sustainability, etc., that the project will provide the opportunity to implement, advance, or contribute to through its implementation.

Explain what opportunities for socioeconomic, cultural, gender, environmental, peace, justice, job creation, and general prosperity growth and development the project will bring to society at large, to specific productive and professional sectors, to MSMEs, etc.

**9. ACTIVITY SCHEDULE:** First, identify the activities, which in turn correspond to the development of the specific objectives, then establish the timelines, responsibilities, and resources.

### FROM 5 TO 15 YEARS MAXIMUM

Objectives Specific	Activities	Time/month	Persons Responsib	Resourc
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Objectives Specific	Activities	Time/month	Persons Responsib	Resourc

## 10. ADMINISTRATION AND FINANCING

You must indicate, in general, the positions of the team of professionals and assistants that are in charge of the project and how the resources to be received will be managed at the project level

## 11 . DECISION MAKING

Indicate:

a.- The way in which the directors of the organization will manage, execute or achieve the objectives and goals/results of the project, and

b.- The methodological route for the development of the project.

## 12. INTERNAL COMMUNICATION AND SOME OPERATIONAL AND FUNCTIONAL ISSUES

A Communications Plan must be drawn up so that the entire human team is connected, preferably virtually (Internet, Skype, Whatsapp and other applications, Zoom, Google Meet, Teams, Jitsi Meet)) and communication (cell phones, radio), face-to-face meetings, as appropriate.

## 13. BUDGET

You must establish your costs of these Items or Activities in Excel so that it is easy to have in order what is the origin of these data or how you calculated them.

**ALL THE BUDGET OF THE PROJECT DO IT FIRST IN EXCEL FORMAT. DO NOT TAKE IT HERE IN ANY WAY.**

**JUST PLACE HERE THE SUMMARY OF EACH ITEM, example, Salaries; Machinery, equipment, facilities, buildings, office equipment, vehicles, inputs, raw materials, training, travel, per diem, publications, etc. Round the decimal places to zero.**

**If the project already has, will obtain or contribute other funds to the requested project, it must be indicated in a separate column.**

TOTAL COST OF THE PROJECT: in Dollars U\$ \_\_\_\_\_

**Years of duration or execution**

**THE FOLLOWING ITEMS ARE JUST AN EXAMPLE, GUIDE OR REFERENCE TO PREPARE THE BUDGET IN EXCEL. IT IS NOT SOMETHING RIGOROUS, BUT ADAPTABLE TO EACH TYPE OF PROJECT.**

**IF YOU NEED TO ADD OTHER ITEMS, YOU CAN DO IT.**

**WHEN YOU HAVE YOUR FINAL BUDGET IN EXCEL, DELETE THE FOLLOWING TABLES IN THIS DOCUMENT.**

**If it is a productive, profitable project, you must establish at least 4 financial indicators: Internal Rate of Return (IRR); Net Present Value (NPV); Cost/Benefit and Break-Even Point, and said final data (not the calculation) places it here.**

ITEMS OR ACTIVITIES	Quantity Unit	Unit	Value	Value Project	Other Contributions	To be requested from CRC
<b>I. Investment expenses</b>						
<b>1. Personnel expenses</b>						
Experts						
Professionals						
Executive or managerial						
personnel Administrative						
Technicians/Supervisors						
Trainers						
Operational/field or auxiliary personnel						
Employer and worker quota for social security						
Employer and worker quota for other employment benefits						
<b>Subtotal personnel</b>						

ITEMS OR ACTIVITIES	Quantity Unit	Unit	Value	Value Project	Other Contributions	To be requested from CRC
<b>2.- General Expenses</b>						
<b>(before starting the project)</b>			50	50		50
<b>expenses project management</b>			20	20		20
Technical and economic studies of the project (approx. cost)			9	9		9
Legal expenses and payments for permits, licenses, Mercantile Registry, Property, etc.			3	3		3
Annual consultancy for evaluation and audit of the project			83,000.0	By years of of each		
<b>component Training</b>						
<b>Seminars (training, Accompaniment, visits)</b>						
Training workshops and u for Beneficiaries or actors						
Workshops, Seminars, exchange visits, videos, etc. training and updating of project personnel.						
Development of Components						
<b>Purchase of equipment</b>						
Machinery and Equipment directly related to the execution of the project						

ITEMS OR ACTIVITIES	Quantit Unit	Unit	Value	Value Project	Other Contributions	To be req from CRC
<b>Furniture and office equipment</b>						
<b>Purchase of vehicles</b>						
<b>Per diems and travel expenses</b>						
National trips						
International trips						
<b>Printing and publications</b>						
Campaigns information						
Publishing of books, magazines, writings, etc.						
Publicity and propaganda						
Disclosure in communication media						
Materials, Internal Informative to beneficiary communities.						
<b>Subtotal overhead</b>						

ITEMS OR ACTIVITIES	Quant Unit	Unit	Value	Value Project	Other Contributions	To be requested from CRC
<b>3. Expenditures on infrastructure</b>						
Purchase of land						
Purchase of buildings or other facilities						
Construction						
Remodeling/reconstruction of infrastructure and real estate						

ITEMS OR ACTIVITIES	Quant Unit	Unit	Value	Value Project	Other Contributions	To be requested from CRC
And other engineering works related to the project						
<b>Subtotal expenses on infrastructure</b>						
<b>TOTAL INVESTMENT EXPENSES</b>						
<b>II. Operating and/or administrative</b>						
<b>1. General expenses</b>						
<b>Materials and supplies/Raw materials to make the products or services of the project.</b>						
Fuels						
Repair and preventive and corrective maintenance of machinery, vehicles and equipment						
Spare parts, oils and lubricants for vehicles, machinery and equipment.						
Insurance of machinery, equipment, real estate, offices and vehicles.						
Physical security and computer security expenses for equipment, machinery, buildings, offices, etc.						
Expenses for supplies, materials and biosafety equipment for facilities, machinery, equipment, offices, vehicles, staff and visitors.						
Depreciation of machinery, vehicles and equipment						
Endowments						
Stationery, consumables and office supplies						

ITEMS OR ACTIVITIES	Quant Unit	Unit	Value	Value Project	Other Contributions	To be requested from CRC
<b>Administrative expenses</b> for the proper functioning of the project (in central offices and other project sites)						
Packing and packaging <b>transportation</b>						
Information transmission services						
Mail, parcels, Courier, logistics, freight						
Other communications in remote areas						
<b>Public services</b>						
Cellular and fixed telephony and other forms of communication						
<b>Leases</b>						
Leases of personal property						
Leases of real estate						
<b>Other unclassified or unforeseen expenses (no more than 3% of the total project)</b>						
<b>Subtotal general expenses</b>						
<b>Total operating and/or administrative</b>						
<b>Grand total investment expenses + operating and/or administrative expenses</b>						

**Remember: These calculations are first made in an Excel File to show where these amounts that are placed in this Table come from.**

**Do not put the Excel Sheets in this document, but only this Table that summarizes said costs, expenses, investments, etc.**

**14 MONITORING AND FOLLOW-UP AND EVALUATION BIENNIAL AND ANNUAL OF THE PROJECT.**

Explain the actions of monitoring, follow-up, supervision and **operational and financial evaluation of the project** and the way in which the community will participate in the evaluation and fulfillment of the project, the evaluation of the performance of the workers in all their functions and positions, using a proper methodology.

**15. PROPOSAL FOR THE SUSTAINABILITY OF THE PROJECT**

Explain how and in what time the project will be sustainable in economic, financial, legal, technical, environmental, cultural, social, labor, business, etc. matters.

Institutional agreements for sustainability and mechanisms are proposed to leave the necessary installed capacity in the participating and benefited population.

**16. SPECIFICATIONS ACCORDING TO THE TYPE OF PROJECT**

Define the type of project, be it productive, educational, cultural, artistic, recreational, social welfare, housing, health, agricultural, environmental, peace and justice, infrastructure construction, sports, etc

Locate the project in the line to which it corresponds, marking with an **X**

**Line in which it is registered** Mark **X** **Subline:** (If there is one)

**Line 1:** Business innovation and social transformation: \_\_\_\_\_

**Line 2:** Fabric and social development: \_\_\_\_\_

**Line 3:** Technological innovations and social change: \_\_\_\_\_

**Line 4:** Community management, participation and development: \_\_\_\_\_

**Other Line:** (which one) \_\_\_\_\_

**17 PROJECT IMPACT**

Use this format to show the impact of the project (place the number of...

.....

BENEFICIARIES		JOBS		COSTS USD\$	
DIRECT	INDIRECT	DIRECT	INDIRECT	TOTAL	REQUESTED

**NOTE:** Direct **jobs** already explained in numeral **4** of this document.

are **NUMBER Indirect jobs** result from multiplying the direct jobs of the project by 5 or more indirect jobs (in construction it can be up to 28 or more) that are related to or benefit from the execution of the type of project in question

**Direct beneficiaries:** they are already explained in **THE NUMBER 4** of this document.

**Indirect beneficiaries:** How they are calculated is already explained in **NUMERAL 4.2** of this document.

## 18 ANNEXES -

You must use the annexes described below and paste it in the corresponding space, according to the titles of the project. You can use more annexes if you consider it pertinent.

Listed below are annexes that you must include **IF YOU HAVE THEM OR CAN GET THEM WHEN SUBMITTING THIS SUMMARY SHEET OF YOUR PROJECT.**

**IF FOR REASONS OF TIME OF RESOURCES, YOU CANNOT DO IT, INDICATE THAT YOU WILL SUBMIT THEM WITH THE PROJECT IN ITS FINAL VERSION.**

**18.1** Provide images as a photographic record of social gatherings, geographical maps, topographical surveys, analytical and comparative tables, list of professionals *assigned to the program and project*, *price list*, *bidders' quotes*, *Brochure of the companies involved in the execution of works*, design of the present civil works and construction, etc.

**18.4.** Designs, structural calculations, architectural plans, plumbing plans, electrical telecommunications plans, gas network designs and plans, air conditioning system designs and plans, security system designs and plans, others according to the type of project.

### **18.5. Brochure of the Suppliers'**

**18.6.** "Resolution of the legal constitution of each of the foundations, companies, NGOs, cooperatives, associations and organizations with legal status, etc. in which the interest of each of the members of the project is declared, with the approval -by unanimous vote of its Board of Directors or Board of Directors.

### **18.7 Other annexes: Tree of Problems and Objectives (see example at the end of this document)**

**SIGNATURE:** \_\_\_\_\_

**RESPONSIBLE:** Full name and position in the organization of the person who delivers the project

**Received** \_\_\_\_\_ **by:**

Angel U. Reyna, who receives the project

Receipt Date: (d) \_\_\_\_\_ (m) \_\_\_\_\_ (y)

\_\_\_\_\_ Time: \_\_\_\_\_ am/pm \_\_\_\_\_

**Project Code:** \_\_\_\_\_