Core Operations

Frequently Asked Questions (FAQ)

Finance and Operations Development Division (FaOD)

Frequently Asked Questions

1. What is the core operations (Core Ops) approach?

The core ops is an approach to our work with partners that focuses on reducing duplication of work and allowing flexibility for partners to manage their projects. It focuses on the collection of information that enables CBM to manage its overall portfolio and reporting to donors and external authorities.

2. What are the aims of the Core Ops?

The Core Ops aims at:

- *Simplification* of reporting to enable partners to focus on project implementation
- *Freeing resources* to enable COs and RHs to dedicate more time to partners
- *Powershift* to provide partners with flexibility to manage their projects, using their own reporting systems
- Exceptions to the core ops based on donor requirements, project size, number of partner & countries, and critical issues

3. Why is CBM using the Core Ops?

The core ops builds on the understanding that one size does not fit all. There is a shift from capturing detailed partner/project information in the system, to capturing of key /high level information submitted by the partner. The detailed project/partner information remains in respective documents filed in the document libraries.

4. When do we start implementation of the Core Ops?

We are all already using the Core Ops approach with some projects. With the roll-out of ProMIS and the migration of project and partner documents the Core Ops has to be applied/ implemented for all projects.

5. How can the Core Ops support partners?

The core ops will enable partners to use their own project development and monitoring systems and tools, instead of filling in additional templates for CBM. For example, if the partner has vast experience in construction projects, its templates might be better suited for reporting. This will not only enable mutual learning between partners and CBM, but also support exchange of good practices between partners.

6. Does flexibility mean the partner can submit anything they want?

No. The partner will have to submit specific required information to CBM as agreed with CBM Country Office. The following order is to be considered when deciding what reporting template is to be used;

- 1st choice: Donor's template (if required)
- 2nd choice: Partner's template (if suitable)
- Last choice: CBM's template (if donor template not required and if partner template not suitable)

7. Are there mandatory and flexible CBM templates?

Yes. In cases where CBM has a specific requirement, CBM templates have to be used:

Figure 1: Overview of mandatory and flexible templates

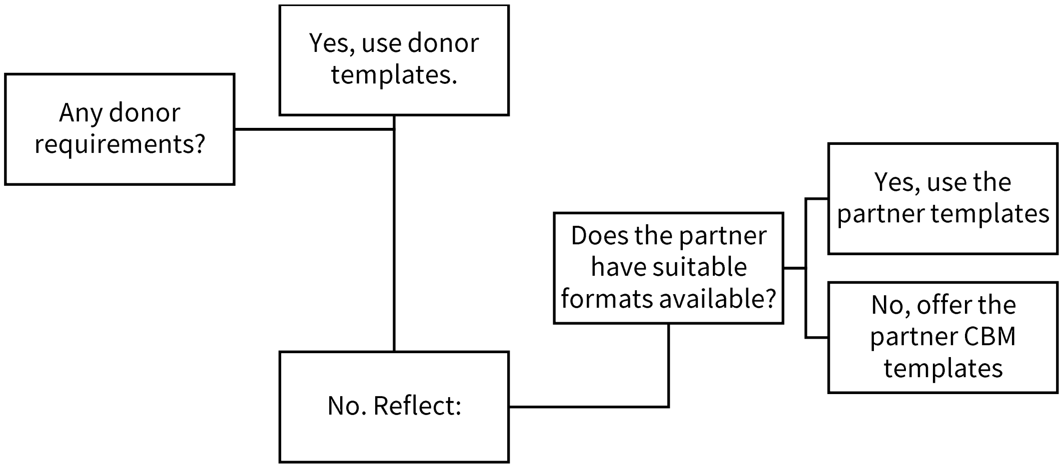
Mandatory Templates – Donor or CBM:	**Flexible Templates – Donor, Partner, CBM:**
Reporting where information is being aggregated/consolidated: • Data Collection Tool (with standard Indicators) • Narrative report • Risk register **Governance** • Partner assessment	**Planning and Monitoring (Financial and programmatic)** • Project Design Form • Logframe • Budget/cost plan • Project Financial Report (PFR replaces PPR) • Evaluation

Finance • Request of Funds (RoF)	

8. Who decides which template to use?

CBM Country Office will decide, in line with the 3-way collaboration, which templates and formats should be used. For Legally Contracted Designated Funding (LCDF) projects, the Country Office will liaise with the responsible Regional Office Programme Delivery team.

Figure 2: How to decided which templates to use



9. Where do I start?

Try to get a good understanding where this approach of simplifying life for the partner could apply: big projects, project with several donors…

In no circumstances will the partner be requested to do double reporting. CBM templates are available to use where donor templates are not applicable or partner templates are not available/suitable. In general, the Partner Assessment process could be the first starting point to principally evaluate available Partner templates.

10. How do I determine if the partner tool is acceptable? What are the minimum requirements/guidelines?

To determine if the partner tool is acceptable and minimum requirements are met, ask yourself:

1. Is the form clear enough to me as Project/finance Officer?
2. Does it contain all the information I need for high level reporting (like objectives, activities, budget, indicators, timelines, expenditures)?
3. Does the tool include the information I need to report the project status (time, scope, budget, forecast) in ProMIS?
4. Would the tool be sufficiently clear to my colleagues in case I am not available?
5. Is/Has the partner been on proviso or critical issue reported on the partner as a result of the adequacy of their reporting tool(s)?

11. Would Partners need to inform the CBM Country Offices of all the Partner template(s)?

Yes. In cases where the CBM Country Office is not familiar with the Partner template(s) to be used, the Partner will inform the responsible CBM Country Office. The same applies if the Partner template is revised during project implementation. If support from the partner is required to understand the templates, the CBM Country Office will request for it before the suitability of partner templates is evaluated.

12. What information will be available in ProMIS?

The partner will use donor's template (if required) or can use its own planning and monitoring formats, if they deliver required information. Detailed planning, monitoring and reporting of projects is still mandatory via documents uploaded to ProMIS document libraries.

Information captured in the system will focus on high level details, for example one budget line, unless the donor requires a specific/detailed budget structure. It will also focus on high-level information to support determining the status of project implementation (time, scope, and budget ratings).

13. Who is responsible for revising or developing new CBM standard templates?

FaOD is responsible for revising or developing any additional standard CBM templates for partners and projects. This should be formally requested from FaOD as needed.

For feedback or additional queries on the Core Ops please contact your Finance Business Partner (finance processes) or the Programme Standards & Quality, PSQ (programme processes).