
Project Overseer Toolkit

Key Policies and Information Resources

- [Guidebook on APEC Projects \(Edition 15\)](#) - the central APEC Project policy document
- [Edition 15: Edit Summary](#) - an overview of new content in the current edition of the Guidebook
- [Applying for APEC Funds Overview](#) - quick reference to the project selection process
- [Project Development in APEC in a Chart](#) - a quick pictorial guide to project selection and development
- [Concept Note](#) - the application form to access APEC Project funding
- [Concept Note Development Materials](#) - a guide to assist the development of Concept Notes
- [APEC Scoring Template](#) - used to assess and score APEC Concept Notes
- [APEC Concept Notes: Guide for Scoring](#) - a framework to guide Concept Note scoring
- [Project Proposal](#) - used to develop approved concepts into full project designs
- [Project Proposal Development Materials](#) - a guide to assist the development of Project Proposals
- [APEC Self-Funded Project Proposal Coversheet](#) - project proposal format for self-funded APEC Projects
- [Guide on Gender Criteria](#) - understanding and applying the APEC Gender Criteria in Projects
- [Project Session 1, 2018: An Overview of Changes](#) - understanding the revised project selection model that was introduced in 2018
- [Project Session 1, 2019: An Overview of Changes](#) - understanding how to complete the revised Concept Note and Project Proposal templates
- [Guidance: Completing the revised Concept Note and Project Proposal Templates](#) - **mandatory reading for all funding applicants**
- [APEC SCE Guidelines for Promoting Cross-Fora Collaboration](#) - policy guide to cross-fora collaboration in APEC
- [2015 SCE Capacity Building Policy](#) - policy on capacity building through economic and technical co-operation in APEC

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- [APEC Guidelines on Conducting Capacity Building](#) - a high level approach to capacity building in APEC Projects

Hosting an APEC Project Event

- [APEC Event Timeline](#) - guidance on planning and implementing an event (workshop, seminar, etc.)
- [APEC Workshop General Information Circular Template](#) - template for the project event General Information Circular
- [APEC Guidelines on Managing Cooperation with Non-Members](#) - policy to guide cooperation with non-APEC members
- [Correct format: APEC Attendance List for Completion Report](#) - mandatory format for collating attendance lists at project events
- [Payment Request for Project Event Costs](#) - reimbursement claim for project costs
- [Per Diem and Attendance Certification](#) - certify event attendance for funded travelers
- [Travel Undertaking Template - Reimbursement](#) - undertaking for travelers funded on reimbursement basis
- [Travel Undertaking Template - Advance Payment](#) - undertaking for travelers funded in advance

Monitoring and Evaluation in APEC Projects

- [Monitoring Report \(2018 and earlier\)](#) - for projects selected in 2018 and earlier
- [Monitoring Report \(2019\) and beyond](#) - for projects selected in 2019 and beyond
- [Completion Report \(2018 and earlier\)](#) - for projects selected in 2018 and earlier
- [Completion Report \(2019\) and beyond](#) - for projects selected in 2019 and beyond
- [Completion Report Supporting Document Checklist](#) - to support proper development of Completion Reports
- [APEC Project Evaluation Survey Template](#) - basic event evaluation framework
- [Good Practice: Sample Project Workshop Evaluation Report](#) - a sample evaluation report

Amending Your APEC Project

- [APEC Project Design Amendment and Extension Form](#) - mandatory for all changes to an approved Project Proposal
- [APEC Project Budget Amendment Form](#) - mandatory where changes have a budget impact

Procurement and Contracting in APEC Projects

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- [Work Undertaking Template](#)
 - [Secretariat's Approval Checklist for Contracts](#)
 - [Preparing Terms of Reference: Guidance for POs](#)
 - [RFP Timeline](#)
 - [RFP Example](#)
 - [Request For Proposal \(RFP\) Template - Standard Projects \(for Contracts over USD20,000\)](#)
 - [Revision/Addenda to RFP](#)
 - [Evaluation of Proposals \\$20,001 - \\$50,000 Template](#)
 - [Evaluation of Proposals Above \\$50,000 Template](#)
 - [Proposal Compliance Checklist](#)
 - [Procurement Process Summary and Endorsement Template](#)
 - [Notice of Acceptance – Conflict of Interest – Notice of Declaration \(for Work Undertakings and Contracts Up to US\\$20,000\)](#)
 - [Notice of Declaration \(for Contracts over US\\$20,000\)](#)
 - [Contract Template - Standard Project](#)
 - [Contractor's Travel Reimbursement Claim Form](#)
 - [APEC Policy Guidelines - addressing Conflict of Interest Issues \(Procurement Principles\)](#)

Media and Publication

- [APEC Publication Guidelines](#)
- [APEC Branding Manual](#)
- [APEC Publications Toolkit](#)
- [Publication Cover Page Template](#)
- [Publication Number and ISBN Request Form](#)

Training Resources for APEC Projects

- [Project Quality Training Materials](#)

Source: <https://www.apec.org/Projects/Forms-and-Resources>.