PAN AMERICAN INSTITUTE
OF GEOGRAPHY AND HISTORY
General Secretariat

TECHNICAL ASSISTANCE PROGRAM
PROJECTS
General Guidelines, 2024-2025

Mexico City, February 2024

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General guidelines for projects, 2024-2025

I. **INTRODUCTION**

The Technical Assistance Program, being a fundamental component of the Scientific Policy of the Pan American Institute of Geography and History (PAIGH), is one of the instruments through which the institutional Mission, Vision and Principles that govern the PAIGH (Articles 2, 3 and 4 of the Organic Statute) are fulfilled.

The PAIGH, by means of the Technical Assistance Program, provides a cooperation mechanism for the finance of research and training activities, aimed at solutions for issues of common interest for its Member States, within the sphere of the four disciplines it studies: Cartography, Geography, History and Geophysics.

In the Technical Assistance Program, the Commissions of the PAIGH, together with the General Secretariat and the National Sections, are responsible for managing and coordinating the scientific-technical activities.

The General Secretariat, through the Departments for Technical Assistance, Financial Administration and Human Resources, have responsibility for the technical – administrative management and coordination tasks.

For the fulfilment of the objectives of the Technical Assistance Program, three sub-programs are being implemented:

A. **Projects.** The aim is to finance research and training projects that are intended for solving the issues of common, shared interest for the Member States.

B. **Grants.** The objective is to offer opportunities for specialized training by means of courses, diplomas, and workshops, etc., by managing grants in conjunction with entities in the scientific, academic, governmental and private initiative sectors.

C. **Formal Agreements.** The purpose is the strengthening of institutions by means of signing cooperation agreements, memorandums of understanding and similar mechanisms, for the transfer and exchange of knowledge.

II. PROJECTS

A. Types of projects

The projects to be submitted to the Technical Assistance Program in search of finance for them to be implemented may be of research, training or seed types.

a. Research projects. The objective is to take on a scientific-technical challenge of shared interest for the Member States, within the PAIGH study areas.

b. Training projects. The purpose is to carry out workshops, courses, seminars, symposiums, and similar events, within the themes of the PAIGH study areas.

c. Seed projects. The aim is to establish the basis and the components for the formulation of projects with a wider scope, concerning a scientific-technical issue of common interest for the Member States, within the PAIGH study areas, and for these to be presented to organizations or entities with the finances to provide greater external sponsorship.

B. **The Projects proposed and submitted should:**

a. Be multinational or regional, so they should be backed by the participation of two or more Member States in the project execution and objectives.

b. Have, preferably, multi-disciplinary participation in order to encourage effective cooperation and collaboration among the four Commissions of the PAIGH.

c. The multi-disciplinary nature will be determined exclusively by the participation of specialists from various areas of knowledge and not by the multi-disciplinary scope of the aims and results of the project by themselves.

d. Be aimed at activities that benefit America, within the sphere of the PAIGH study areas: Cartography, Geography, History, Geophysics and related sciences.

e. Be related to the objectives of the PAIGH and contribute to a better understanding of the regional dimension that helps to overcome the obstacles common to the Member States. The idea is to give preference to projects of a regional scope.

f. Be aligned with the Goals and Objectives of the PAIGH Commissions, which are determined by each commission, within the four-year work plan.

g. Consider the themes and issues that are priorities in the regional and international agendas.

h. Cover all the requirements indicated in the respective call for project proposals and those stated in these general guidelines here.

i. The process of submitting project proposals is carried out in two stages:

   1. First stage. The applicants perform the submission of the projects by means of the on-line form specifically for this, which will be available during the corresponding period of the call for proposals.

   2. Second stage. The applicants send, by electronic mail, the additional required documentation of the project, to the corresponding National Section for this to be analyzed and backed up, in accordance with that stated in part C of these general guidelines.

      The researchers responsible for the project will have up to 15 calendar days, following the close of the call for project proposals, to send the additional documentation required to their respective National Section.

j. Once the additional documentation required has been analyzed and given backing by the respective National Section, this will be sent, by electronic mail, to the Technical Assistance Department of the General Secretariat.

k. Project proposals and/or the additional documentation required will not be received by any means other than the channels that have been stipulated.

l. Project proposals and/or the additional documentation required will not be recieved outside the time limits set.

m. Researchers will not be able to submit project proposals if they have been responsible for leading any previous, separate project that has been put into effect during the two years leading up to the date of the current call for project proposals, or if they have not fully complied with the obligations that they had when leading those previous projects financed by the PAIGH.

n. The researchers responsible for those project proposals submitted that are approved will undertake the commitment to draft and deliver on time and in the correct format the technical reports and statements of accounts to be rendered, where these correspond to or are in accordance with the type of project; they also commit to delivering the final product and to publishing an article in one of the scientific journals of the PAIGH, in relation to the theme and subject of the project in consideration and being based on the final technical report presented.

C. Additional documentation required

a. The additional documentation required should be sent in .pdf format by electronic mail to the respective National Section and is made up of the following:

1. Formal letter through which the respective National Section is requested to give its backing and to present the project proposed, to the Technical Assistance Program.

2. Letter of commitment from the lead researcher (The base format of this letter should be requested from the Technical Assistance Department asistencia.tecnica@ipgh.org).
3. Copy of currently valid official identification, with photography and signature, of the lead researcher.
4. Copy of currently valid official identifications, with photographs and signatures, of the other researchers participating in the project, if there are any.
5. Full curriculum of the lead researcher.
6. Letters stating the participation of the countries that are co-participating in the project. These letters should be issued by the respective National Sections.
7. Letter(s) stating the commitment of the co-sponsoring institution(s).

8. Presentation of the project being proposed:
    i. Executive summary of the project.
    ii. Justification.
    iii. Description of the problem that it is proposed to address and manage.
    iv. General Objectives.
    v. Specific Objectives.
    vi. Results and product(s) expected to be obtained.
    vii. Total amount and figures broken down, by commission, which will be requested from the PAIGH (USD).

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Amount that the co-sponsoring institution(s) will contribute (in USD).
Calendar and sequence of work, with the associated costs.
Description of the classes of expenses with the associated costs that are intended to be financed by the PAIGH.
Description of the classes of expenses with the associated costs that will be financed by the co-sponsoring institution(s).

D. Disbursement and use of funds

a. The Technical Assistance Department, in coordination with the Financial Administration and Human Resources Department, will be responsible for the tracking actions and assistance for the processes involved in the disbursement of the funds approved and the statements on these for rendering accounts, in order to check the fulfillment, in detail, of the commitments that project leaders undertake when their proposals are financed by the PAIGH.

b. The funds approved will be provided only to the researchers responsible for the projects, by means of transfers between bank accounts.

c. Funds will not be provided in the form of cash or checks.

d. If, due to special circumstances, it is required for the funds to be transferred to an account that is not that of the project lead reseacher, this should be managed by means of a formal letter to the PAIGH General Secretariat, who will decide if the request is to be granted or not.

e. The Project leaders should manage their requests for funds going through their respective National Section, by means of the format specific to this, which should be correctly filled out and signed by the project leader and the president of the respective National Section.
The National Section will be responsible for sending the requests for funds to the Technical Assistance Department of the General Secretariat.

f. The period for the disbursement of the approved funds will be from March 1st and will close on November 15th of each year.

g. The funds approved for projects will be available to be requested and used in the project implementation only in the financial year for which they were approved (Article 14 of the Financial Rules of Procedure).

h. The funds approved may be requested in accordance with the following schedule:

Research Projects

Disbursement	First	Second	Third
Period	March – May	June – August	September – November
Percentage of funds approved	30%	30%	40%

Training Projects

Disbursement	Once only
Period	March – November
Percentage of funds approved	100%

<u>Seed</u> Projects

Disbursement	First	Second	Third
Period	March – May	June – August	September – November
Percentage of funds approved	30%	30%	40%

i. In order to make the request for the disbursement of approved funds, the reserchers responsible for projects should comply with the following requirements:

1. First disbursement:

   i. Request, in cooperation with the respective National Section, the corresponding funds (the form for requests is obtained from the Technical Assistance Department).

   ii. Send a clear and legible copy of a currently-valid official identification of the Project leader with a photograph and signature.

   iii. Send the letter of commitment to accepting these general guidelines here.

iv.   Provide the banking data of the project leader for the transfer of the funds.

2.   Second disbursement:

i.   Request, in cooperation with the respective National Section, the corresponding funds (the form for requests is obtained from the Technical Assistance Department).

ii.   Present the first partial technical report about the progress of activities and the statement of accounts for the first disbursement of funds.

The transfer of the funds of the second disbursement, will be subject to the approval of the first partial technical report and the statement of accounts for the first disbursement.

3.   Third disbursement:

i.   Request, in cooperation with the respective National Section, the corresponding funds (the form for requests is obtained from the Technical Assistance Department).

ii.   Present the second partial technical report about the progress of activities and the statement of accounts for the second disbursement of funds.

The transfer of the funds of the third disbursement, will be subject to the approval of the second partial technical report and the statement of accounts for the second disbursement.

j. The requests for funds should describe the classes of expenses to be financed by the PAIGH in a way consistent with that indicated in the approved proposal.

k. If the researcher responsible for the project needs to make adjustments to the classes of expenses, he/she should request, by means of a formal letter, the corresponding authorization from the respective commission president(s), giving details of the reasons explaining the changes involved.

l. The following types of expenses will not be financed by the PAIGH, nor will those which have not been specified in the request for funds:

1. Salary, wages or fees for the researcher responsible for the project.
2. Hiring or rental of premises as space for carrying out the tasks of the project.
3. Coordination or operation of the research centre sites.
4. Payments for participation in or attendee registration for conferences.
5. Payments for the publication of articles in journals.
6. Purchase of information technological or office equipment (hardware, software or user licences, furniture, etc.).
7. Payment of medical or travel insurance where these are not associated with the purchase of air travel tickets.
8. Tickets for travel to countries that are not member nor observer states of the PAIGH.

9. Social activities resulting from the activities financed by the PAIGH during the performance of the project.

10. Alcoholic drinks, gourmet food, etc.

11. Lunches or dinners for social integration.

12. Purchase of souvenirs or memorabilia.

For information about classes of expenses not described in the list above, contact the Technical Assistance Department for the appropriate queries asistencia.tecnica@ipgh.org.

m. In the case of the projects that will receive finance from two or more Commissions, the researcher responsible for the project should draft a funds request for each commission.

n. The formats for the disbursement of funds, the letter of commitment, the detailed breakdown of expenses accounts statements, guidelines for the disbursement, spending and use of funds, and the formats and documents derived from these, may all be requested from the Technical Assistance Department at asistencia.tecnica@ipgh.org

E. Statements of accounts for approved funds

a. The statements of accounts to be rendered are subject to local or international audits and are made through the institutional mechanisms (APEF Committee and the General Secretariat), where projects financed by the PAIGH are concerned.

b. The Technical Assistance, Financial Administration and Human Resources Departments will be responsible for checking and approving the statements of accounts from the projects.

c. For the detailed breakdown of the expenses in the account statement, the only exchange rate (US dollar / local currency) to be applied is that which the local bank has determined at the date on which the resources in the account of the project leader have been withdrawn for use.

d. The researcher responsible for the Project should send the corresponding account statement in .pdf format, to the Technical Assistance Department asistencia.tecnica@ipgh.org of the General Secretariat, through his/her respective National Section (for the purposes of tracking data and transparency).

e. The breakdown of expenses in the accounts statement should be consistent with the classes of expenses indicated in the request for the disbursement of funds. The expense classes not specified in that request will be inadmissible.

f. The detailed breakdown for the statement of accounts should be presented using the format specified for it; this may be requested from the Technical Assistance Department asistencia.tecnica@ipgh.org.

g. The statement of accounts should be presented in .PDF format as follows:

   1. Made up of the detailed breakdown of expenses, signed by the project leader.

2. Receipts for expenses; where possible these should be invoices extended specifically to the PAIGH.

3. Receipts for simple expenses, giving details or attaching the following:
   i. Description and amount of the payment
   ii. Name and signature of the person benefited and of the project leader
   iii. Copy of a currently valid official identification, with a photograph and signature of the person benefited

4. In the case of providers of professional services, the proof of expenses should be made in accordance with the rules established by the country where these services are performed.

5. In the case of travel expenses, the following is to be detailed or backed in documents attached:
   i. Description and amount of the payment
   ii. Name and signature of the person benefited and of the project leader
   iii. Copy of a currently valid official identification, with a photograph and signature of the person benefited

6. In the case of air travel tickets, the following is to be detailed or attached:
   i. Document proving the purchase
   ii. Copy of the air travel tickets that state the name of the person benefited

iii. Copy of a currently valid official identification, with a photograph and signature of the person benefited

F. Unused and unspent funds

a. In accordance with that stated in Article 12 of the Financial Rules of Procedure, the remaining unspent funds, should be returned to the General Secretariat within the 30 calendar days following the conclusion of the project. For these purposes, contact the Technical Assistance Department at asistencia.tecnica@ipgh.org, of the General Secretariat.

b. If, due to any circumstances, the Project cannot be implemented or the tasks involved were not carried out in accordance with the established schedule, the funds should be returned to the General Secretariat, before the end of the financial year for which the Project was approved.

G. Finalizing and closure of projects

a. The researchers responsible for projects for which the activities have been completed, should notify the Technical Assistance Department about that completion no more than 30 calendar days after its end.

b. Once the activities of the project have been completed, the researcher responsible for it should present:

1. Research projects:
    i. A final, detailed technical report, which will be published on the official Web site of the PAIGH.
    ii. A final detailed report for rendering financial accounts.
    iii. An article for one of the scientific journals of the PAIGH, based on the final technical report.
    iv. Final product and results of the project.

2. Training projects
    i. A final, detailed technical report; this will be published on the official Web site of the PAIGH.
    ii. A final detailed report for rendering financial accounts.
    iii. Video lasting up to a maximum of 10 minutes, which shows key moments in the activities carried out, including the startup or initial stage and the finish or closing event at the training.
    iv. A full report and analysis about the activities performed, which includes the schedule of the work sessions, the collection of the presentations given, together with the written authorization of the authors of those presentations for their publication, a brief resumé description of the speakers, the objectives reached and the conclusions with an assessment of the activities performed.

3. Seed projects

    i.   A final, detailed technical report, which will be published on the official web site of the PAIGH.

    ii.   A final detailed report for rendering financial accounts.

    iii.   Seed project and detailed description of the actions to take for finding and obtaining a greater degree of finance from external financial entities.

c. The projects should be implemented, and the activities concluded, in the financial year for which they were approved.

d. If, due to special circumstances, the project requieres a longer period for its activities to be completed and to be able to keep receiving the finance of the institute, this situation should be notified to the PAIGH General Secretariat, going through the Technical Assistance Department and doing this by means of a formal letter, before September the 30th of the period for which the implementation of the project was approved. The idea is that the Secretary General will take decisions based on his criteria.

e. The funds remaining after their projects have been implemented should be returned to the General Secretariat no more than 30 days after the activities of the Project have been completed.

f. The funds from projects that have not been put into effect at all or have been implemented only partially should be returned to the General Secretariat before the financial year for which they were approved has finished.

g. The General Secretariat will make available to the researchers responsible for the project, several means for the publication of the final products of the projects. Some of these channels will be by agreement with other organizations and/or entities.

h. If the Secretary General sees or detects any irregularity committed by a researcher responsible for a project being put into effect, he has powers to take the appropriate actions such as the permanent suspension of the finance, among others, and take the corresponding measures that the PAIGH applies.

i. The Secretary General will be responsible for tracking and supervising all and each one of the phases of the Technical Assistance Program, from the drafting and public distribution of the respective call for proposals, up to the final completion of all and each one of the projects. In the same way, he will check that the Commission Presidents, the National Sections, the researchers participating, also the employees at the Technical Assistance and Financial Administration Departments of the General Secretariat itself comply with the specifications of these general guidelines here. At the same time, the Secretary General is empowered to take the decisions that he judges suitable for the correct fulfilment of these guidelines here, including decision to suspend the finance of a given project, manage the return of the funds

and proceed to disqualify a specific researcher, if this is necessary, in terms of needing to safeguard the interests, resources, reputation and good name of the PAIGH.

H. **National Sections**

a. The National Sections will be the only entities with the powers to issue supporting statements and to submit the project proposals of their respective citizens.

b. They will be responsible for receiving the additional documentation required, which they will analyze and give backing statements to, for it to be subsequently sent, by electronic mail, to the Technical Assistance Department of the General Secretariat.

c. They will determine the actions and procedures to follow, for the analysis of the additional documentation required, so that this may be given backing by the respective National Section President.

d. They may refuse to approve projects of citizens from the same country as that National Section, where these are judged to be inappropriate for being backed and/or submitted.

e. They will have up to 20 calendar days, following the close of the call for Project proposals, to send the additional documentation required to the Technical Assistance Department of the General Secretariat.

f. They will be responsible for informing the Project leaders if the proposals submitted have been approved or rejected, for receiving the financial resources allowing them to be performed.

g. During the period of the implementation of the projects, the National Sections will act as links between the Project leaders and the Technical Assistance Department of the General Secretariat, in everything involved with the technical-administrative management such as: requests for approved funds, the presentation of technical reports, statements of accounts to be rendered, among others.

I. **Commissions**

a. The Technical Assistance Department of the General Secretariat will send to the Commission, the project documentation packages submitted by the National Sections and the access routes to the archives of the additional documentation required, no more than 21 calendar days after the close of the respective call for project proposals.

b. The Commission presidents will have up to 30 calendar days for the analysis of the projects.

c. The Commission presidents will be able to freely implement the procedures and methodologies that they consider necessary, for the assessment and analysis of the projects submitted.

d. The General Secretariat will convene a virtual session just prior to the intermediate Meeting of PAIGH Authorities of the period, at which the Commission presidents, the Technical Assistance Department, and the Financial Administration and Human Resources Department will participate, in order to carry out the preliminary assignment of funds to the eligible projects, by the Commission presidents.

At this virtual meeting, the consolidated table of the projects with the details of the draft assignment of funds will be filled in.

e. Subsequently, the Technical Assistance Department of the General Secretariat will draft and provide to each Commission president, a table with specific details for the management of the funds assigned on a preliminary basis to the projects; this will contain the classes of expense that make up the budget of each commission.

f. During the implementation of the work of the projects that have been approved, the Commission presidents will have the responsibility of assessing the respective partial and/or final reports.

J. **Meeting of PAIGH Authorities**

a. At the intermediate Meeting of PAIGH Authorities of the period, the Commission Presidents will jointly present the draft assignment of funds for the projects that are eligible and recommended.

b. Once the projects have been assessed by the intermediate Meeting of PAIGH Authorities, they will be transferred to the General Assembly to be approved.

c. The Meeting of PAIGH Authorities will have the power to disqualify project leaders from the Technical Assistance Program, in accordance with that stated in Article 42 of the Financial Rules of Procedure.

K. **General Assembly**

   a. The General Assembly of the PAIGH will be the official occasion on which the Commission presidents will report about the recommended projects and the assignation of funds to be approved.

   b. The projects will be approved jointly with the General Budget of the PAIGH for the corresponding period.

L. Unexpected situations

   a. If, due to fully justified special circumstances, the person responsible for a project needs to be changed, the corresponding authorization should be managed in coordination with the respective Commission President(s) by means of a formal letter, with a copy to the PAIGH General Secretariat.

   For these ends, whoever takes over the leadersip of the Project should be of the same nationality and should have the same academic or adult education degree as the researcher who initially was responsible for the project.

   b. If, in the judgement of the respective Commission President and/or the General Secretariat, it is seen that a Project being executed is not keeping to or is going against the rules of the PAIGH, the Authorities of the Institute will be able to intervene together and in coordination, to take the corresponding actions.

c. If any aspect specified in the call for proposals and in the general guidelines is left unfulfilled, that stated in Articles 13 and 42 of the Financial Rules of Procedure currently in force can be put into effect.

j. Any omission from or situation not foreseen in these general guidelines, will be analyzed by the head of the General Secretariat for its immediate solution.