

4. Contracting: Once a project has been approved, a contract needs to be signed. Up to three different types of agreements are required. The first is a Tripartite Agreement among the BSIF, the Community and the Line Ministry. The second agreement is a contract with an independent consultant who will supervise the works or provide training on behalf of BSIF. The third is an agreement for works between BSIF and the contractor, which shall be legally binding and will ensure the performance of the works according to specifications.

Contract Procedures

(a) Shopping Model: Three to 6 contractors are invited to submit quotations for the supply of goods and services less than Bz \$50,000 and works, of an estimated value of less than Bz \$200,000.

(b) National Competitive Bidding: The contract is advertised in the local newspapers and the Bidder is required to provide a Bid Security as well as contract qualification information at the time his bid is submitted. This model is applied for works contract of a value of Bz \$200,000 to Bz \$1.0 Million and the purchase of goods with a value of Bz \$50,00 to Bz \$200,000.

(c) Direct Contracting: Works or services required are obtained from one contractor without competition for contracts not exceeding Bz \$30,000. This method is used only in exceptional circumstances and with the approval of the funding agency.

The Belize Social Investment Fund

Breaking the Cycle of Poverty

5. Project Implementation: Depending on the nature and scope of the project, an engineering consulting firm may be contracted prior to the signing of the contract. The project, however, will be executed and monitored by BSIF.

6. Project Supervision: Supervision of the project will be carried out by BSIF or its consultants according to established guidelines. Generally, the supervision will verify:

- (i) physical progress of work
- (ii) financial performance
- (iii) the degree of community participation; and
- (iv) if work is progressing in accordance with specifications and conditions of the contract.

7. Project Completion: After the completion of the project, a final report will be prepared by the BSIF supervising Technical Officer. An official inauguration ceremony, and handing over of the project to the community normally follows.

THE BELIZE SOCIAL INVESTMENT FUND

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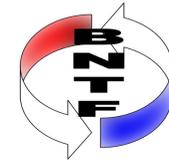
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THE SOCIAL INVESTMENT FUND

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THE BASIC NEEDS TRUST FUND

Quick Project Guide

For Community Organizations & NGO's



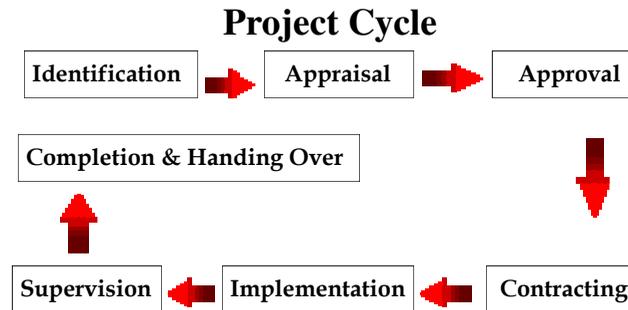
Project Guide

The Belize Social Investment Fund (BSIF) is the implementing agency for projects undertaken by the Government to address the basic human needs of the poorest of the poor in Belize. The Fund is designed to assist communities in identifying their needs and prioritizing projects they want to submit for funding. The BSIF typically does not finance projects in excess of Bz \$1.0 Million dollars. All projects must be supported by a community-based organization, even if it is submitted in co-ordination with another institution. This booklet is designed to provide you with easy step by step guidelines to assist you in the process leading to successful project submission and completion.

AREAS IN WHICH SIF FUNDS

PROJECTS

- Water & Sanitation Infrastructure and Training
- Health Infrastructure and Training
- Access Roads and Drainage
- Education Infrastructure
- Social Services Infrastructure and Training
- Organizational Strengthening



Identifying a Need for the Community

1. Project Identification: A project idea is born. Community leaders, Ministers and Area Representatives can do the following:

Send a letter for a project request or complete a Project Request Form. Forms can be obtained and submitted (hand delivered or via email) to the main BSIF office in Belmopan or at the BSIF District offices in Punta Gorda or Corozal Towns. Forms are also available on www.sifbelize.org

(i) **Community Needs and Assets Assessment (CNAA):** Upon receipt of letter or form, BSIF will screen the request for eligibility and conduct a Community Needs and Assets Assessment to help the community concerned to prioritize their needs and identify the necessary input to the project.

2. Appraisal: After a project proposal meets the eligibility criteria and funds are identified to consider the project, the Technical Unit at BSIF will appraise the project and prepare a request for project approval.

(i) **Community Meetings:** When a project is being appraised, BSIF will meet with representatives of the community to form a Project Management Committee (PMC). The main role of the PMC is to assist BSIF in the implementation of the project. In addition, the PMC also plays a key role in the planning and implementation of regular community meetings to inform community leaders, Area Representatives and residents of the nature, scope and progress of the project with the aim to encourage community participation and ownership of the project.

3. Approval: Completed project proposals will be presented to the BSIF Board of Directors for approval. The Board meets every 3rd Friday of the month. The processing time between the CNAA and approval by the Board is about 2 months.

(i) On approval of a project, the BSIF will notify applicants and facilitating agents. The applicant is then invited to the BSIF office and briefed by the Legal Unit on the procurement procedures and contract procedure to be applied.

N.B. *Projects funded by the Basic Needs Trust Fund (BNTF) and the European Union need to have final approval from the Caribbean Development Bank (CDB) and the European Union, respectively.*

The Social Investment Fund is also the implementing agency for the Belize Municipal Development Project (BMDP), a \$30.0 Million dollar project which aims to improve access to municipal infrastructure and enhance municipal management in selected town and city councils of Belize.