

CESO | SACO

International Services



Application Form for CESO Services



Canada

CESO|SACO is supported by the Government of Canada through
CIDA (Canadian International Development Agency)

*Let CESO assist you in developing and promoting
your business or organization*

WHO ARE WE?

CESO is a private, not-for-profit Canadian organization of Volunteer Advisers providing technical and managerial assistance to the private and public sectors. We have over 3,000 Volunteers with solid experience in more than 150 professional, management and technical areas who serve as advisers, trainers, and mentors to Clients in Africa, the Americas, Asia, the Caribbean, Central and Eastern Europe, and the new republics of the Former Soviet Union.

HOW CAN WE ASSIST YOU?

Our Volunteer Advisers can provide you with practical advice, training, and up-to-date information that will assist you in achieving the goals you have set for your business or organization. When you work with a CESO VA you are working with an expert, who will help you identify and solve problems that are causing you difficulties, and in the process help you develop and promote your business or organization. To date, CESO's VAs have successfully helped thousands of organizations and businesses just like yours meet their goals and aspirations.



CESO | SACO

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Application Guidelines

This set of guidelines has been prepared to assist the Client in completing the application form. CESO requires specific information to ensure the best possible match of VA skills to Client needs, so all the questions must be answered. The numbered sections correspond to the questions on the form.

1 *Basic Client Profile*

This section introduces your company or organization to us. We need to know the specifics of your profile, specifically:

1.1 **Name of Client: State the company name**

For repeat Clients, please ensure that the name given is identical to the company name on the previous application form, and please provide the previous CESO assignment number (see question 1.5). This information is for internal identification and recordkeeping purposes.

1.4 **City or Town: Essential information for travel arrangements**

If the assignment location is in a small town, please indicate the distance (in kilometres) and the direction (north, south, west, east) from the capital city. When giving the telephone number, please include the country and city routing codes for dialling.

1.8 **Foreign Ownership:**

CESO does not normally provide assistance if a company's foreign ownership is greater than 15%

- a) In case of foreign ownership, please state the % of ownership, the nationality and the name of the owner or company.
- b) Please indicate the level and type of assistance provided by the foreign owner, and why they are unable to assist you with your current problem.

1.9 **Subsidiary Relationship:**

If applicable, please describe your relationship with the parent company in terms of the degree of control or authority they have over your operation for decisionmaking purposes.

1.10 **Business Classification:** the following provides examples of how to identify your business activity, (it is not exclusive)

Agribusiness: crops, livestock, food processing

Business Services: computer, consulting, accounting, architecture

Educational Services: university, schools, training institutes, libraries

Financial Services: bank, insurance, real estate

Food and Beverage/Accommodation: restaurants, cafeteria, hotel

Government Services: town administration, ministries, post office, garbage

Health and Social Services: hospitals, clinics

Manufacturing: printing, chemicals, furniture, plastics, food processing

Not for Profit Organizations: community groups, associations

Resources: fishing, forestry, mining

Trade: retail/wholesale, department stores, export/import

Transportation: railways, airports, shipping, trucking

Tourism: restaurants, hotels, travel agencies, museums, art galleries, tourism bureaux, sports related activities

Utilities: electricity, water, gas

Etc.

2 *Description of the Business or Service*

This section contains a series of questions about your operation in order to provide CESO with an accurate picture of your operation that will assist us in the selection of the appropriate VA. You are required to answer the questions in the section that pertains to your specific activity:

- ➔ If a private enterprise, **GO TO QUESTION 2.1**
- ➔ If an NGO or business association, **GO TO QUESTION 2.2**
- ➔ If a government agency, **GO TO QUESTION 2.3**

Please complete all of the questions within your section, including answering "non-applicable (N/A)" for those questions that do not apply to you. Use as much space as required to answer the questions. The form has been designed to be expandable. **Do not leave any questions blank.**

Environmental Considerations

In line with current global trends, the Government of Canada's position on addressing environmental components throughout its activities, and CESO's own objectives, CESO has developed a strategy to contribute towards environmentally sustainable development. In each of the three Client sections (private enterprise, NGO, government), CESO has included a number of questions pertaining to the environment, specifically how you deal with waste disposal and/or pollution generation. **It is important that you answer these questions.**

3 *Assistance Requested from CESO*

3.1 **Definition of Problem**

Ensure that this section provides a clear description of the reason for the application. Start by identifying the problem. If you require assistance in several areas, **please itemize in order of priority.**

3.2 **Request for Assistance**

The information provided in this section will assist us in selecting the most suitable Volunteer Adviser. Therefore, it is crucial that you be as specific as possible in terms of what you need and the type of experience required by the VA.

If you are requesting a specific CESO Volunteer Adviser, **please identify the person in this section.**

4 *Expected Assignment Outputs and Outcomes*

4.1/2 The purpose of this section is to identify what results you expect from CESO's assistance, and to enable us to determine, at the completion of the assignment, whether we were successful in helping you move toward your goals.

Results are defined as follows:

Outputs are the immediate, tangible **results of a VA's assistance achieved by the end of the assignment.**

Outcomes are the medium term results that are achieved as a **consequence of you, the Client, applying or implementing the assignment's outputs.** Outcomes are the consequences of newly trained staff applying new skills, or the application of new procedures or business plans.

Examples of outputs:

- ◆ Trained staff
- ◆ Operational procedures
- ◆ Organizational practices
- ◆ Layout plans
- ◆ Marketing and strategic plans
- ◆ New product formulations

Examples of outcomes:

- ◆ Improved company operating efficiency
- ◆ Increased production volume
- ◆ Increased sales and revenue generation
- ◆ Improved product/service quality
- ◆ Introduction of new products/services on the market
- ◆ Savings in operating costs



CR Reference No.	
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Application for CESO Assistance

All information provided will be held in strictest confidence

1 Basic Client Profile

1.1 Name of Client *(see guideline)* _____

1.2 Name of Owner Mr. Ms. _____

1.3 Name and Title of Principal Officer Mr. Ms. _____

1.4 Address of Client *(see guideline)*

Street Address: _____

City or Town: _____

Country: _____ Email: _____

Telephone: _____ Fax: _____

Cell Phone: _____ Web Site: _____

1.5 Is this the first time you have accessed CESO assistance? YES NO
If no, provide the number of the previous assignment (s). _____

1.6 Describe Ownership
_____ % Government _____ % Private (local) _____ % Private (foreign)

1.7 What year was your company/organization established? _____

1.8 If foreign ownership, state companies involved and amount of assistance they provide to you. *(see guideline)*

1.9 Is the company a Parent or Subsidiary? *(see guideline)* Parent Subsidiary
Degree of Control/Authority over Decision-making _____

1.10 Type of Activity carried out by the Client *(see guideline)*

<input type="checkbox"/> Agribusiness	<input type="checkbox"/> Government Services	<input type="checkbox"/> Trade (Retail/Wholesale)
<input type="checkbox"/> Business Services	<input type="checkbox"/> Health Services	<input type="checkbox"/> Transportation
<input type="checkbox"/> Educational Services	<input type="checkbox"/> Manufacturing	<input type="checkbox"/> Tourism Services
<input type="checkbox"/> Financial Services	<input type="checkbox"/> Not for Profit Organization	<input type="checkbox"/> Utilities
<input type="checkbox"/> Food/Beverage & Accommodation	<input type="checkbox"/> Resources	<input type="checkbox"/> Other (identify)

2 Diagnostic of the Business or Service

- ➔ If a private enterprise, GO TO QUESTION 2.1 (see guideline)
- ➔ If an NGO or business association, GO TO QUESTION 2.2 (see guideline)
- ➔ If a government agency, GO TO QUESTION 2.3 (see guideline)

2.1 Private Enterprise Only

Use as much space as required to answer the questions.

The form has been designed to be expandable. **Do not leave any questions blank.**

2.1.1 Describe in full detail your business or service, listing products or services offered. Attach any brochures or other descriptive information if available.

2.1.2 Document your yearly sales, in US dollars, over the last three years

Year	_____	US \$ Sales	_____
Year	_____	US \$ Sales	_____
Year	_____	US \$ Sales	_____

2.1.3 Document your annual operating budget, in US dollars, over the last three years

Year	_____	US \$ Operating Budget	_____
Year	_____	US \$ Operating Budget	_____
Year	_____	US \$ Operating Budget	_____

2.1.4 How many employees work for you?

	Male	Female	Total
Full time Employees			
Contractual Employees (Part time or Seasonal)			

2.1.5 Describe the equipment or machinery (brand, model, year) used relevant to the request (if applicable)

2.1.6 Does your business have a business/strategic plan? If yes, please attach a copy.

YES

NO

◆ What is the primary objective of the plan?

◆ Was it prepared by your company or by an external consultant?

2.1 Private Enterprise Only - continued

2.1.7 What is your annual production volume, if applicable?

2.1.8 Is your business currently operating at optimum capacity?
If no, why? YES NO

2.1.9 Does your business prepare annual financial reports? If yes, please attach a copy.
If no, why? YES NO

2.1.10 Are you currently operating at a profit or a loss? PROFIT Gross Profit (in US \$) _____
 LOSS Loss (in US \$) _____

2.1.11 Does your business have any impact on the environment?
If yes, please explain? YES NO I DON'T KNOW

2.1.12 How do you deal with your waste (e.g. municipal pick-up, burning, throwing away, recycling, composting)?

How do you deal with air/noise pollution, if applicable?

2.1.13 Do you have an environmental policy in place? If yes, please attach. YES NO

2.1.14 Would you like any assistance on environmental considerations with regards to your activities?
If yes, please describe. YES NO

2.1.15 Describe your current market (e.g. domestic and/or export percentages, domestic market share).

2.1.16 Does your business have a marketing plan? If yes, please attach a copy. YES NO

2.1 **Private Enterprise Only - continued**

2.1.17 Does your business have a quality control system. If yes, please describe (e.g. ISO, HACCP, etc.). YES NO

2.1.18 What is your percentage of production rejects/percentage of customer complaints?

2.1.19 Does your business have a computer system? YES NO
Does your business have access to the Internet? YES NO
◆ What is your computer system used for?

2.1.20 If, applicable, what kind of assistance has your business received from any other international organizations (e.g. staff, financial, equipment)?

2.1.21 Do you consider your business successful? Why?

2.2 NGOs, Business Associations Only

Use as much space as required to answer the questions.

The form has been designed to be expandable. Do not leave any questions blank.

2.2.1 Do you have a vision/mission statement? If yes, please attach a copy. YES NO

2.2.2 What services does your organization provide, and to whom?

2.2.3 How many people access your services annually? Men _____ Women _____

2.2.4 Is your organization currently delivering its services? YES NO
If no, what is preventing service delivery?

2.2.5 Provide your annual operating budget, in US dollars, over the last three years

Year	_____	US \$ Operating Budget	_____
Year	_____	US \$ Operating Budget	_____
Year	_____	US \$ Operating Budget	_____

2.2.6 Provide a breakdown of your funding sources, in US dollars, over the last three years

Year	_____	Domestic (in US \$)	_____	International (in US \$)	_____
Year	_____	Domestic (in US \$)	_____	International (in US \$)	_____
Year	_____	Domestic (in US \$)	_____	International (in US \$)	_____

2.2.7 How many people work in your organization?
How many members to you have?

	Male	Female	Total
Full time Employees			
Contractual Employees (Part time or Seasonal)			
Volunteers			
Members			

2.2 NGOs, Business Associations Only – continued

- 2.2.8 Does your organization have the resources (staff, financial, equipment) to successfully carry out its activities?
If not, what resources are lacking? YES NO
- 2.2.9 Does your organization have a business/strategic plan? If yes, please attach a copy.
◆ What is the primary objective of the plan? YES NO
- ◆ Was it prepared by your organization or by an external consultant?
- 2.2.10 Does your organization prepare annual financial reports? If yes, please attach a copy. YES NO
- 2.2.11 Does your organization have a computer system? YES NO
Does your organization have access to the Internet? YES NO
◆ What is your computer system used for?
- 2.2.12 Does your organization's mandate include any environmental considerations?
If yes, please describe. YES NO
- 2.1.13 How do you deal with your waste (e.g. municipal pick-up, burning, throwing away, recycling, composting)?
- How do you deal with air/noise pollution, if applicable?
- 2.1.14 Would you like any assistance on environmental considerations with regards to your activities?
If yes, please describe. YES NO
- 2.2.15 If applicable, what kind of assistance has your organization received from any other international organizations (e.g. staff, financial, equipment)?
- 2.2.16 Do you consider your organization successful? Why?

2.3 Government Agencies, Ministries, Departments Only

Use as much space as required to answer the questions.

The form has been designed to be expandable. Do not leave any questions blank.

2.3.1 What is your mandate?

2.3.2 Does your agency/department have a vision/mission statement? If yes, please attach a copy. YES NO

2.3.3 Approximately how many people in your country does your agency/department serve or represent? Men _____ Women _____

2.3.4 To what part of the government do you belong?

2.3.5 Provide your annual operating budget, in US dollars, over the last three years

Year	_____	US \$ Operating Budget	_____
Year	_____	US \$ Operating Budget	_____
Year	_____	US \$ Operating Budget	_____

2.3.6 Does your statute give your agency/department budget autonomy? YES NO

2.3.7 How many people work for your agency/department?

	Male	Female	Total
Full time Employees			
Contractual Employees (Part time or Seasonal)			
Volunteers			

2.3.8 Does your agency/department have the resources (staff, financial, equipment) to successfully carry out its activities? If not, what resources are lacking? YES NO

2.3 Government Agencies, Ministries, Departments Only

- 2.3.9 Does your agency/department have a business/strategic plan? If yes, please attach a copy. YES NO
◆ What is the primary objective of the plan?
- ◆ Was it prepared by your agency/department or by an external consultant?
- 2.3.10 Does your agency/department prepare annual financial reports? If yes, please attach a copy. YES NO
If no, why?
- 2.3.11 Do you have any environmental policy regulations, or by-laws in place with respect to: waste management, air, water, noise, or any other types of pollution? If yes, please attach. YES NO
- 2.3.12 Do you have any procedures in place to monitor compliance with the above? YES NO
- 2.3.13 Would you like any assistance on environmental considerations with regards to your activities? YES NO
If yes, please describe.
- 2.3.14 Does your agency/department have a computer system? YES NO
Does your agency/department have access to the Internet? YES NO
◆ What is your computer system used for?
- 2.3.15 If applicable, what kind of assistance has your agency/department received from any other international organizations (e.g. staff, financial, equipment)?
- 2.3.16 Do you consider your agency/department successful? Why?

3 ***Problem Description and Assistance Requested from CESO***

3.1 Describe as fully as possible the problem(s) or circumstance(s) leading to your request for assistance. Describe multiple problems in order of priority. *(see guideline)*

3.2 What do you want the Volunteer Adviser to do? *(see guideline)*

3.3 Identify the specific skills required of the VA.

4 ***Expected Assignment Results***

4.1 Identify the outputs (i.e. immediate results) you expect from the VA upon completion of the assignment. (*see guideline*)

4.2 Identify the outcomes (i.e. the medium-term results) you expect to realize from CESO's assistance. (see guideline)

4.3 What preparatory work you would like the VA to do before he/she arrives?

4.4 Estimated duration of the assignment: _____ weeks

4.5 Preferred start date: _____ Last acceptable start date: _____

4.6 Identify the person who will work with the VA as a counterpart.

Name of Counterpart Title

Telephone: _____ Email: _____

4.7 Does this person speak English/French ? English French

NOTE: IF NEITHER, THE CLIENT MUST PROVIDE AN INTERPRETER.

5 Accommodation Arrangements

In order to appropriately prepare for the assignment the Volunteer Adviser (and spouse, if applicable), need to know what type of accommodation will be available for them. At this stage, we ask that you give some thought to the accommodation arrangements that you plan to make by answering the following questions.

- 5.1 Please indicate whether the accommodation is a hotel or apartment, giving as much detail as possible (for example fully equipped kitchen with appliances, dishes, pots and pans, or a hot plate and a few dishes).

- 5.2 Indicate the address and telephone number of the accommodation.

- 5.3 Identify meal arrangements. Will the VA (and spouse, if applicable) eat out at restaurants or is the Volunteer Adviser able to cook for him/herself?

- 5.4 Identify what laundry facilities are available.

- 5.5 Does the accommodation have heating or air-conditioning units?

- 5.6 What type of clothing (business/social) should the VA (and spouse, if applicable) bring?

If this information is not known at this time, the information must be received two weeks prior to the assignment start date. If the information is not received, the assignment will be delayed until such time as it is submitted.

6 Terms and Conditions

The Client and CESO understand and agree that, upon acceptance of the assignment and execution of this Agreement by CESO, the following terms and responsibilities will govern the relationship between them.

General Terms

- CESO will select a Volunteer Adviser (VA) with the appropriate qualifications in the areas requiring assistance. Responsibility for approving CESO's VA selection rests solely with the Client. In the case when a VA is rejected, another VA will be selected and submitted for Client approval
- The VA is not an agent of CESO, CIDA or the Government of Canada and has no authority to enter into an agreement on behalf of CESO, CIDA or the Government of Canada
- The Client will not bring any legal proceedings, assert any claims or cause any legal proceedings to be brought against the VA, the Government of Canada, CIDA, or CESO, their personnel and/or officers and/or agents and/or heirs in connection with an assignment, as a result of an assignment or in the absence or cancellation of an assignment; and
- The Government of Canada, CIDA, CESO, their personnel and/or officers and/or agents and/or heirs shall not be held responsible for the VA's actions on/off duty before, during or after the assignment

CESO Responsibilities

1. The Volunteer Adviser will:
 - execute the assignment to the best of his/her abilities and to the agreed upon requirements of the assignment
 - treat the Client and Client staff with respect at all times
 - follow directions from CESO Operations Centre and observe CESO's Code of Conduct during the course of the assignment
 - assist the Client during normal working hours (changes to the working hours or duration may be made by mutual agreement among the Client, the VA and the CESO Country Representative)
 - hold in confidence all information the Client designates as confidential

CESO Responsibilities

2. The Country Representative will:
 - ensure accommodation arrangements that are safe, clean, comfortable, sanitary and ready for the arrival of the VA
 - ensure the Client is ready to receive the VA (counterpart/translators) and to implement advice, including confirming that the Terms of Reference haven't changed since application and approval
 - advise the Client regarding their responsibilities to and for the VA
 - ensure the VA is picked up at the airport; and subsequently ensure the VA's safe departure from the country
 - monitor assignment progress
 - assist the VA with any problems that may arise, including the resolution of conflicts with the Client, if applicable, extension of visas, etc.
 - accurately and honestly complete the evaluation reporting forms and ensure that the Clients complete theirs; these forms should be submitted within 2 weeks of assignment completion
 - ensure that Clients make promised payments towards the assignment

Client Responsibilities

The Client will:

- keep the Country Representative up-to-date on any developments related to the content of the application, the assignment scheduling and logistics, etc.
- communicate with the selected VA (via telephone, fax or e-mail) to discuss the parameters of the assignment, the final Terms of Reference, and any preparatory work that may be required by either party prior to deployment to the assignment site
- assign the appropriate employee(s), who has/have been fully briefed about the function of the VA, as VA counterpart(s) for the assignment
- ensure appropriate office facilities, secretarial and translation services, and equipment and supplies required for the successful performance of VA duties
- give full co-operation and access to any information that may be needed to carry out the assignment
- budget for any expenses that may be incurred in connection with any activities related to the assignment
- provide transportation for the VA between his/her residence and workplace on a daily basis
- provide appropriate and comfortable accommodation for the VA (and his/her spouse, if applicable)
- complete the Client Evaluation Report on assistance received; the report must be submitted to the CESO Country Representative no later than 2 weeks after the VA's departure
- provide feedback to CESO staff, at regular intervals, on the progress realized relative to the assistance received (i.e. 6-12 months after assignment completion)

7 Client Agreement

<i>Assignment Funding</i>	CESO (A)	CLIENT (B)	VA (C)	3 rd PARTY (D) SPONSOR
1. International Airfare	X CAD \$			
2. Walk Around Money	Days X CAD \$ 10.00			
3. Food*	Days X CAD \$			
4. Accommodation*	Days X CAD \$			
5. Transportation*				
Car/Driver/Gas*	Days X CAD \$			
Bus/Train/ Pass*	Days X CAD \$			
Local Airfare/Train Travel	X CAD \$			
6. Translation Costs*	Days X CAD \$			
7. CESO Administration Costs (CAD \$ 10,000)				
8. Client Contribution				
9. Value of VA Services	Days X CAD \$ 350			
Total Assignment Funding:	(A)+(B)+(C)+(D) CAD \$			

Note: While these amounts (*) are estimates shown in approximate Canadian funds, it is understood that when contributed by the Client, local costs will be paid in equivalent local currency, for the actual amounts incurred. Payments for food and accommodation will be made either direct to the providers (e.g. hotel, restaurant) or in cash to the Volunteer Adviser.

Authorizing Signatures

By completing and signing this application form, we (the Client) hereby apply for the services of a CESO Volunteer Adviser for the purposes described above. We have provided herein the essential information to allow CESO to assess and process our application. When we accept a proposed Volunteer Adviser we will abide by "CESO's/Terms and Conditions" which we have been provided with, read, understood, and accepted. We (the Client) hereby acknowledge that CESO has acted in good faith, and based on the information provided to CESO by the Client, has recommended an appropriate Volunteer Adviser.

We (the Client) will not bring any legal proceedings, assert any claims or cause any legal proceedings to be brought against the VA, the Government of Canada, CIDA, or CESO, their personnel and/or officers and/or agents and/or heirs in connection with an assignment, as a result of an assignment, or in the absence or cancellation of an assignment; and the Government of Canada, CIDA, CESO, their personnel and/or officers and/or agents and/or heirs shall not be held responsible for the VA's actions on/off duty before, during or after the assignment.

Name of Client Officer (print)

Signature of Client Officer

Title and Position

Date

I, the Country Representative have reviewed all the relevant information and confirm that this request for CESO services is complete and meets the criteria as an acceptable CESO assignment in all respects.

Signature of Country Representative

Date