



FIDE Planning and Development programme guidelines

Objectives

The following guidelines aim to provide a clear framework regarding the FIDE Planning and Development programme's general conditions, eligibility for funding assistance, covered expenses, the application process, and reporting.

Description

FIDE's primary mission is the development of Chess as sports, cultural activity, educational tool and its other forms across the globe. This requires a renewed focus on strengthening National Chess Federations and by extension the Continental Chess bodies in Africa, America, Asia and Europe. These guidelines provide the criteria for the funding of all FIDE Development Fund (DF) beneficiaries in scope: **National Chess Federations, FIDE Continents, FIDE Zones, FIDE Commissions, FIDE Affiliated Organisations.**

FIDE strives to provide a structured process for the Planning and Development Programme to create a closer collaboration between FIDE and its DF beneficiaries.

FIDE has delegated the responsibility for funding of DF to the Planning and Development Commission (FIDE PDC). The FIDE PDC provides administration of funding requests and reporting according to FIDE budget, leadership priorities, DF guidelines and defined KPIs.

The funding can be in the form of cash, chess services or other chess assets and will include direct payments to the beneficiary (federation, organisation, organizer of the FIDE-approved event etc.) or payments to vendors providing goods or services to the beneficiary.

FIDE reserves the right to approve the funding of projects outside the scope of the said guidelines if such projects comply with important FIDE short-term priorities or crisis management.



Beneficiaries

This programme is open to the following beneficiaries (further in text – Applicant) on annual basis:

- **FIDE National Chess Federation (NCF)**
 - An NCF which falls under Development Levels¹ 3, 4 and 5 is directly eligible for the DF.
 - The funding request of NCFs which are in other Development Levels, will be considered on case-by-case basis, provided they have proposed specific projects that comply with FIDE policy priorities and are endorsed by the respective FIDE Commissions.
 - The Applicant must not be in arrears with FIDE or must have an agreed payment plan to settle any previous arrears.
 - Associated Federations are eligible for DF if such funding is needed to notably promote their full admission to FIDE.
 - If a Reverse Delegate (RD) has been appointed to the NCF, the DF can be granted as per suggestion of RD if it clearly facilitates sustainability of chess life and provides return of legitimate governance of federation.
- **FIDE Continent**
 - All 4 Continents are eligible for the same funding amount.
 - Continental projects must comply with annual continental priorities and FIDE policy priorities.
 - If any practices, methodologies, databases working materials are created within Continental projects, those need to be accessible to NCFs without restrictions and/or cost.
- **FIDE Commission/Committee**
 - FIDE Commissions are eligible to be financed from the budget line “Commission Priority Projects” as long as the funding is sufficient in the programme.
 - Projects must be well planned, aligned with the Commission’s annual plan and FIDE strategic goals, and serve fundraising potential, strategic partnerships, and visibility of FIDE. Projects must be confirmed as well with the respective FIDE Director who coordinates the Commission.
 - Cross-commission projects are encouraged.
- **FIDE Affiliated Organisation**
 - A FIDE Affiliated Organisation is eligible to receive DF, provided they don’t belong to any of the other types of beneficiaries (e.g. an affiliated organisation already funded as a FIDE Zone)
 - Projects must be compliant with the Affiliated Organisation’s development plan and FIDE priorities.
- **FIDE Zone**
 - FIDE Zone members need to have their functional legal entity, operational institutional base and/or contractual relationship that manages their cooperation and can take responsibility for the project implementation and reporting on behalf of members.
 - A FIDE Zone is eligible to receive DF if they suggest relevant development activities engaging all the zone’s member federations and the project is aligned with priorities of the Continent and FIDE.

Development Levels are based on <https://handbook.fide.com/chapter/DevelopmentIndexRegulations>, published at <https://pdc.fide.com/fide-development-levels/>, reviewed every year and applied to National Federations determining their eligibility to DF and other support programmes of FIDE.



INTERNATIONAL CHESS FEDERATION

APPENDIX A

Each Applicant must follow the determined activities most pertinent for its scale (i.e., do not “cascade down” the financing) and apply for DF by proposing projects which are aligned with FIDE goals and objectives and lie within the FIDE eligible programmes and priority areas.

Indicative Amount of Funding

National Chess Federation ²	Up to 5 000 EUR
FIDE Continent	Up to 100 000 EUR
FIDE Affiliated Organisation	Up to 20 000 EUR, not exceeding 50% from a single project budget and 20% from the annual budget of the organization
FIDE Zone	Up to 20 000 EUR, not exceeding 50% from a single project budget and 20% from the annual activity cost of the respective zone
FIDE Commission/Committee	Subject to relevance of priority projects

The amount of funding is reviewed on an annual basis, based on FIDE budget allocations. FIDE reserves the right to adjust the conditions related to the funding of the Applicant with prior notice, or to adapt the schedule, based on the financial context.

On top of the regular DF programme, beneficiaries are eligible to receive additional funding in the framework of FIDE targeted programmes if applicable (e.g. Olympiad travel support, Women in chess events etc.).

Multi-year planning

It is recommended that the projects proposed by each Applicant are part of a multi-year plan.

The FIDE Continents and FIDE Commissions must provide FIDE with their Annual Plan before the start of the new year cycle, which would then serve as a basis for funding request.

Applicants are encouraged to plan their activities based on a strategic plan with concrete objectives for their development strategy over the determined period. As such, these projects will have to be prioritized, following a logical structure that considers the different levels and needs, and the technical and financial planning of the entire plan.

Any of proposed projects that demonstrate documented evidence of other sponsorship/co-financing from other sources or creating strategic partnerships with further publicity/fundraising potential would be prioritized.

² Including Associated Member Federations and Federations with a Reverse Delegate appointed



Suggested areas of cooperation – FIDE orientations and priority areas

The Development Programme's objective is to help the Applicant to implement projects and activities that aim to improve the development of Chess in all its forms. The proposed Development Programme must be in line with the global FIDE orientations and the Applicant's strategic plan:

- Activities must correspond to the scope/area/level of importance of the Applicant (e.g. a FIDE Commission or a Continental Chess Organisation is not expected to request funds for a project of an individual federation level unless it is a proven individual pilot activity to be further replicated at the respective level).
- The proposed projects should have an incentive/motivating orientation based on KPIs baseline, with the aim to fill in the blanks in the Applicant's development status.

Priority areas and eligibility per type of Applicant

Priority Areas	NCF	Comm.	Aff. Org.	Cont.	Zone
Hosting events (over the board, online or hybrid)	Yes* ³	No	Yes	Yes	Yes
Participation in international events for players ⁴	Yes	No*	No	No*	No*
Talent training	Yes	Yes	Yes	Yes	Yes
Chess capacity building: training of organizers, arbiters, trainers, educators, fair play officers, etc. ⁵	Yes	Yes	Yes	Yes	Yes
Management capacity building: administrative, technical, governance, project, planning and financial management, marketing, and promotion	Yes	PDC	Yes	Yes	Yes
Social Projects: e.g. work with prisons, refugees, vulnerable groups of society, etc...	Yes	Yes	Yes	Yes	Yes
Women/Girls in Chess: Training programmes and activities for female chess players and officials	Yes	Yes	Yes	Yes	Yes
Life-long learning: Chess in Education	Yes	EDU	Yes	Yes	Yes
Sponsor/partner engagement/fundraising	Yes	Yes	Yes	Yes	Yes
Marketing/PR/Chess Demonstration activities	Yes	Yes	Yes	Yes	Yes
Preservation of Chess history	Yes	Hist	Yes	Yes	Yes
Nonaffiliated countries: Development and promotion of chess in non-affiliated countries	N/A	Yes	N/A	Yes	N/A
Lobbying efforts for the inclusion of chess into Continental Olympic Games	N/A	N/A	N/A	Yes	Yes

³ Priority to norm/title events in federations that have not had any such in place.

NOT TO BE cross financed with the FIDE Open Aid Package programme.

⁴ Exceptions for projects belonging to specific target programmes, e.g. support to specific populations or facilitating women, PwD, senior participation in chess events.

⁵ Training needs to be coordinated with the respective FIDE Commission



FIDE Orientations

When relevant in the context of the Applicant, the following FIDE orientations should be considered as priorities:

- Orientation 1: “1 women national team in each federation”: Federations with no women team in the previous Olympiad should have this project as a priority.
- Orientation 2: “host rated and/or norm events in each federation”: Federations of level 3-4-5 with no rated events should have this project as a priority; federations of level 2-3 with no norm events should have this project as a priority.
- Orientation 3: “double the number of kids engaged in educational chess”

Financial conditions and covered expenses

The allocated DF is paid to the beneficiary or the designated third party upon approval of the project and receipt of invoice/banking information.

Only a legal entity representing the beneficiary as defined in these guidelines is eligible to receive the DF. No payments to personal accounts are eligible. If due to sanctions or other serious constraints the beneficiary cannot receive the funding directly, a special payment solution needs to be agreed on with the FIDE Financial Department.

The Applicant will receive an official notification from the FIDE PDC confirming the support of the project and payment.

The Applicant must conduct an accurate assessment of the forecasted costs when they estimate the budget for a project (e.g. apply lecturing rates in line with the market or regulations from the relevant commission). The Applicant may be asked to make changes and/or provide additional information before the confirmation of the project and payment from the FIDE DF.

The funds provided from DF cover the organisational costs in line with the detailed budget breakdown submitted by the Applicant. The Applicant should submit any significant modification or expense variations not listed in the approved budget breakdown to the FIDE PDC as soon as possible.

The Applicant needs to indicate if the said project or related activities are co-financed from other FIDE, Continental, federation, affiliated organization's resources. Any cross-financing of the same project/programme is forbidden.

Payments to be made directly to the beneficiary may be done in one or several tranches (e.g. 50% prior to the event and 50% after the project deliverables have been proved), suggested approach subject to the discretion of FIDE.



Covered expenses

Within the scope of FIDE priority areas, below is a list of covered expenses; however, this list is not exhaustive and should you have any doubts, please do not hesitate to contact PDC:

- Organization cost: rent of a hall, prizes, etc.
- Participation cost: send players/delegations to a competition/training
- Chess Material, equipment supply
- Lecturing fees: pay lecturers/trainers
- Tuition fees: support trainees
- Promotion: media/marketing/website/internet/demo events
- Scientific studies/research

Expenses NOT covered

The following projects and expenses are NOT eligible to be funded by the DF:

- Administrative expenses that the Applicants incur on a regular and continuous basis (such as salaries, cost of Executive Board or staff meetings, operational costs of the Applicant's headquarters, prior debts, etc.)
- The purchase of office or electronic equipment (laptop, projector, screen, printer, camera, etc.)
- Travel and/or accommodation of Executive Board/Council members. The funding will not cover meals or per diems for travels linked to the development programme.
- Double expenses: funding the same project through various sources of finance from FIDE (e.g. direct funding to the NCF + funding through the continental chess organisation's Development Fund allocation or a FIDE Commission). FIDE may only support the entity corresponding to the actual scope of the activity.
- Cascading funds: funding a project in the scope of a lower entity that is directly eligible for funding by FIDE (e.g., a continent or an affiliated organisation funding a project of an individual NCF scope).
- Activities that support a political campaign of any member/entity/person are not eligible for funding.
- Expenses that are not relevant to the project/programme's goals and implementation of activities.



Application procedure

To apply for the FIDE DF, the Applicant must complete the Funding request (application forms available at www.pdc.fide.com) and provide a clear project proposal on how they plan to use the annual development subsidy, along with detailed administrative information. The full application needs to be sent to the following e-mail address: fedfunding@fide.com.

In addition to completing the Funding request, the Applicant should submit copies of related documents, such as the project budget proposal of each project for the year of application, and other supporting documents related to chess development.

Prerequisites

Prior to requesting FIDE funding, the Applicant must sign the Agreement of Assistance/Partnership with FIDE and provide the evidence of existing governance structures which **MUST** include:

- Constitution/Statutes/By Laws and Incorporation/Certificate of Registration (if available).
- Minutes from General Assembly/ Meetings, Strategic/Operational plans, audited financial reports (if applicable).

The Applicant must fulfill the obligations listed in the FIDE Charter⁶ and provide certified accounts for the particular year, in the subsequent year.

This does not apply to FIDE Commissions as internal organs of FIDE.

Funding calendar, deadlines and annual plan of activities

Projects are funded on a calendar year basis.

The annual funding period is open from March 1st to October 31st. This is the period when funding requests are expected to be sent to FIDE.

Requests received out of this time frame may see their review postponed to the next cycle.

Early applications are allowed if the activities of the project are planned before the funding period is open, the applicant has provided full reports of the previous projects, and PDC has approved them.

Otherwise, the applicant may apply also for post-event DF for activities that have taken place from 1 January till 1 March, if the project and applicant is fully eligible to the criteria set in these guidelines.

FIDE Continents and FIDE Commissions are expected to share an annual plan of PDC funded activities, to be reviewed together with PDC before their official publication. Such annual planning review meetings should be scheduled in January/February every year and be coordinated with the respective FIDE Continental President or the FIDE Director responsible for the coordination of the commission.

In order to share a good visibility of the funded projects, a funding request should reach FIDE at least one month prior to the start of the project. Requests reaching FIDE less than two weeks prior to the start of the project might be rejected and are at the discretion of the FIDE PDC.

⁶ Art. 11 for federations ; Art. 14 for Affiliated Organisations; Art. 32 for continents



Request for funding

The document supporting a request for funding is called **Appendix B**. Appendix B exists in 2 different forms, depending on the type of Applicant:

- Drawdown Request for funding template: when the Applicant works on a yearly development plan together with PDC (Continents and FIDE Commissions).
- Request for funding template: when the Applicant submits projects directly (NCF, Affiliated Organisations, Zones).

Appendix B must be filled with all relevant details within the opening dates of funding for the year. Sufficient details should be provided with each request to allow for proper assessment by the PDC.

The minimum elements that should be included in the Appendix B are the following:

- Dates and place
- Full Budget, showing FIDE contribution and other sources of income
- Clear description of project activities, the expected results (quantitative and qualitative) and impact on the beneficiary's chess life activity
- Reference to the beneficiary's development programmes and priorities
- KPIs impacted by the projects and their targets
- Project dissemination plan (website/communication plan/media)

The PDC will review these requests to ensure alignment with pre-approved activities before sending for final approval by the FIDE Treasurer and the FIDE Management Board Deputy Chair.

Appendix B must be sent to PDC (fedfunding@fide.com) before 31 October of each year.

Goals and Key Performance Indicators (KPIs)

FIDE expects that all NCFs measure their Key Performance Indicators (KPIs), whether they request DF or not. The document introducing KPIs and providing their list is called **Appendix C** and the actual figures will be published on the PDC website.

Each funded project must state clear and achievable goals and estimate the impacts on the relevant KPIs as part of the measurement of success of the project. Considering that a project has a reduced scope, the Applicant will be asked to identify up to 4 KPIs that are impacted by the project in Appendix B and set the corresponding targets in numbers.



Implementation of the funded activities

The Applicant should implement the funded activities for the current year of submission. If the planned activities had to be delayed for any reason, a notification should be sent to FIDE PDC (fedfunding@fide.com) and a deviation should be reflected in the final report.

FIDE DF support must be properly advertised for all funded projects, with mandatory inclusion of the FIDE official logo and a reference to the FIDE DF programme to be used in all publications, social media news with the following slogan: The Project has been supported by the FIDE Development Fund.

The Applicant must have a website/social media presence and provide in due time to fedfunding@fide.com the following media reports on the projects / events. They will also be used as 'NEWS' for the PDC/FIDE Websites:

- Announcement of the project – within 14 days after the FIDE funds received or 14 days prior to the start of the project/event;
- Announcement on the start of the project – one day prior to the start of the project/event;
- Final publication with the results/achievements of the project/event within 3 days after the end of the project/event.

Reporting procedure

As per the FIDE procedures of good governance, the Applicant is requested to complete a FIDE PDC Final Report within one month after the completion of the funded project and send it to fedfunding@fide.com.

The document supporting a funding report is called **Appendix D**.

The Appendix D should be signed, for each funded project, by the President of the beneficiary or another person legally eligible to represent the beneficiary.

The minimum elements that must be included in the Appendix D are the following:

- The report form:
 - o Actual number of participants and beneficiaries
 - o Outcomes of the project (quantitative and qualitative)
 - o Description of dissemination activities and FIDE DF support publicity (photos and other proof to be provided)
 - o Key learnings
 - o Any other relevant documentation.
- The financial form with project expenditure details, including the actual budget vs initial plan.

FIDE PDC may request for clarifications / amendment of documents.

Note that it is mandatory to provide relevant evidence corresponding to the project expenditure in the financial form. Upon request by the PDC, the Applicant should present the relevant invoices and receipts.

When describing the expenditures in the financial form, if the project budget is higher than the FIDE funding amount, please refer to the full amount spent in the project and highlight what has been spent through the FIDE funding budget.



Non-compliant documentation and failure to report

For a smooth operating of the funding process, the Applicant is expected to respect the deadlines and provide all documents listed in the present document.

Please note that any documentation shared with FIDE PDC which do not comply with the above guidelines will be rejected until all documentation is correctly submitted. This includes not providing extra documents requested by PDC.

Failing to report properly and/or to deliver the preapproved activities within the funded projects will lead to a full/partial reduction of DF allocation, request of compensation and/or limited access to FIDE DF in the following funding periods:

- Failure to report on time:
 - Up to 2 months delay: no new application accepted until the full reporting is done.
 - Above 2 months delay: for the next funding request of the Applicant, no funding until the full report is provided and approved by FIDE PDC & no full pre-payment available.
 - Repeated failure to report on time: no funding in the next period.
- Deviation from the initial plan:
 - Without prior endorsement by PDC:
 - reimburse the amount corresponding to the unfulfilled activities or
 - no access to any new funding until the said activities have been implemented, a report provided and approved by FIDE PDC and
 - no full pre-payment of the next cycle's project available.
 - With prior endorsement by PDC:
 - To be dealt on a case-by-case basis, and the possible action may be as follows:
 - fully/partially replacing the initial project by other relevant activities;
 - postponing the allocated funding to the next funding cycle;
 - if justified, extension of implementation of initial activities provided.