



RESPONSIBLE GOVERNANCE & MANAGEMENT

CAPACITY BUILDING WORKSHOP FOR CIVIL SOCIETY ORGANIZATIONS

PROJECT MANAGEMENT & DOCUMENTATION

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September 17 – 21, 2018, Jaipur and New Delhi



WHY CAPACITY BUILDING FOR CSOS?

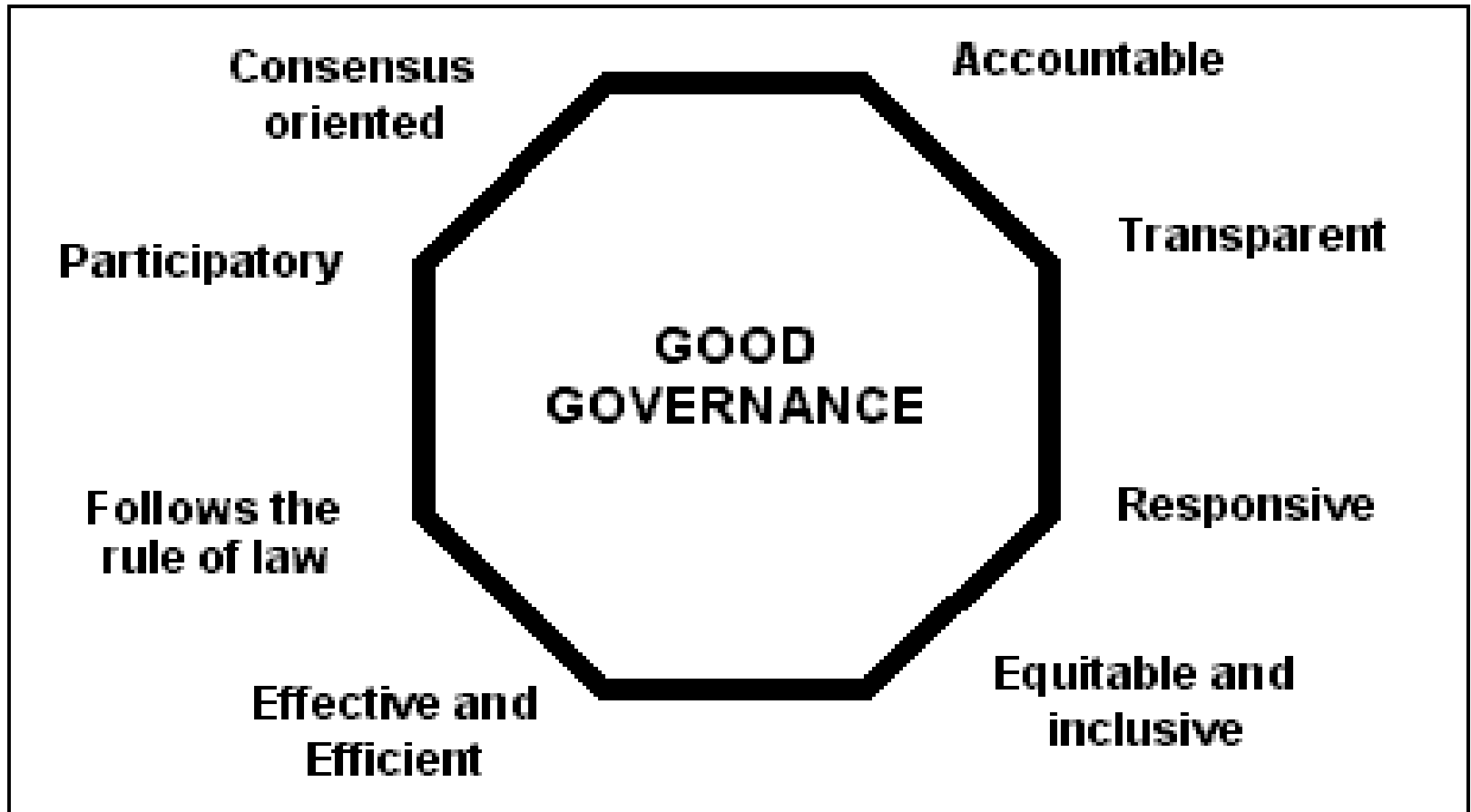
To foster the development of CSOs'....

- Effectiveness & efficiency
- Confidence
- Creativity
- Independence
- AND maximize their impacts on communities they serve!

THE CSO MISSION



GOOD GOVERNANCE IS VITAL



ESSENTIALS OF PROJECT MANAGEMENT

- **Project Planning**
- **Project Monitoring**
- **Project Evaluation**
- **Systematic Documentation**

THE GAME PLAN

Project Planning:

- Purposes and key steps of project planning
- Components of a project Plan
- Needs assessment
- Setting Goals & Objectives
- Checklist for effective project delivery
- The Logic Model

THE GAME PLAN

Project Monitoring:

- What is project monitoring and why it is important

Project Evaluation:

- Key evaluation considerations
- Process evaluation and outcome evaluation
- Components of the evaluation plan

Report Writing

THREE IMPORTANT INGREDIENTS FOR CSO SUCCESS

- 1) Client(s) satisfaction
- 2) Employee satisfaction
- 3) Organizational efficiency

PURPOSES OF PROJECT PLANNING

- To provide clear directions for the CSO's project & services
- To reduce uncertainty during implementation
- To minimize waste, redundancy & duplication
- To set standards for various project components (benchmarking)
- To monitor project progress

KEY STEPS OF GOOD PROJECT PLANNING

- The right planning team
- Clear understanding on organizational mission
- Knowledge on issues
- Well defined needs and priorities
- Development of client-centered alternative solutions. Examples: CECOEDECON, HelpAge India

ESSENTIALS OF GOOD PROJECT PLANNING

- Choosing the right solution based on...
 - Its promise for success (concepts, best/promising models, etc.)
 - Its goodness of fit (with target communities)
 - Its adequacy
 - Its compatibility (with other projects, partners, etc.)
 - Its practicality of implementation
 - Its fiscal feasibility
 - Its potential impacts (short, intermediate & long-term)

A PROJECT PLAN

- Is.....
- A document with specific goals & objectives (end) and logical & practical action statements to achieve them (means)
- A document that clearly states what, when, and how project actions (such as prevention, intervention or treatment) are to be carried out

COMPONENTS OF A PROJECT PLAN

- Needs/issues statement
- Solution to the issues
- Appropriate goals
- SMART objectives
- Strategies
- Action steps (who, when, how, etc.)
- Lists of clear input – output – outcome
- Benchmarks for project success
- Measurements and indicators for evaluation

NEEDS ASSESSMENT

- Need for a service is the difference between a desirable and the actual state of affairs
- Needs assessment is the way of...
 - Identifying key issues of target audience
 - Gauging opinions & assumptions
 - Identifying available resources (assets)
 - And defining the specific need for the project for the target audience
- It is a tool (often the first step) in project planning

NEEDS ASSESSMENT STEPS

- 1) Gather information on current conditions of specific issues that the organization will address
- 2) Identify the prevalence and/or severity of the issue in the target community
- 3) Establish the causes and consequences of the issues
- 4) Detail how the issues are currently addressed (or not) in the community
- 5) Set the standard for desired 'scenario' for the program

GOAL SETTING

- Projects exist because they fulfill some worthwhile goal(s)
- Goals are derived from pre-determined problems & needs...through a participatory process
- Goals are general statements of what the project intends to achieve in terms of stated needs
- Goals need to be set clearly and concisely
- Each goal should only encompass one idea and be distinct from every other goal

GOAL SETTING

- Question to ask: what does the project intend to achieve?
- Model for developing goals: For.....(target group) to.....(gain a benefit to address the issue)
- Examples:
 - For women in rural Rajasthan to gain economic empowerment
 - For destitute senior citizens to have dignified life

OBJECTIVE SETTING

- Objectives (aka. project outcome objectives) are specific statements targeting specific project goal
- There must be multiple objectives under each goal
- Ideally, objectives should be SMART
 - Specific
 - Measurable
 - Achievable
 - Realistic
 - Time-bound

OBJECTIVE SETTING

- Good objective = direction of change + area of change + target population + degree of change + time frame

Examples:

- Direction of change: To reduce poverty
- Area of change: To gain economic self sufficiency
- Target population: 500 poor women in 10 villages
- Degree of change: So that 75% of clients gain livelihood opportunities
- Time frame: within 9 months of the project

OBJECTIVE SETTING

- Objectives provide measurable results (ie: desired amount of change) that will benefit potential program recipients during a particular time-period
- Examples:
 - 500 rural women will receive comprehensive livelihood skills during the first eight months of the project
 - 350 near-destitute elders will be provided weekly opportunities to socialize with one another

OBJECTIVE SETTING

- Each objective should have a related strategy and output
- Strategy is the operational detail needed for achieving the project goal
- Examples:
 - During the 4th month of the project, a support group of women clients will be established
 - During the first phase of the project, a network of volunteers will be established

CHECKLIST OF EFFECTIVE PROJECT DELIVERY

- 1) Determine the need for the project
- 2) Develop the project plan (goals, objectives, etc.)
- 3) Complete the action plan (where, how, when, etc,)
- 4) Develop a budget and allocate appropriate resources
- 5) Build credibility into your project (right employees, supervisors, etc.)
- 6) Monitor, evaluate and adjust

SOME CONSIDERATIONS

■ Advisory Committee

- Board members, internal/external experts, potential recipients

■ Competition/duplication

- Who else is doing similar work?

■ Collaborations

- Would it be beneficial to form a collaboration with other organizations or groups that can bring key skills to the table?

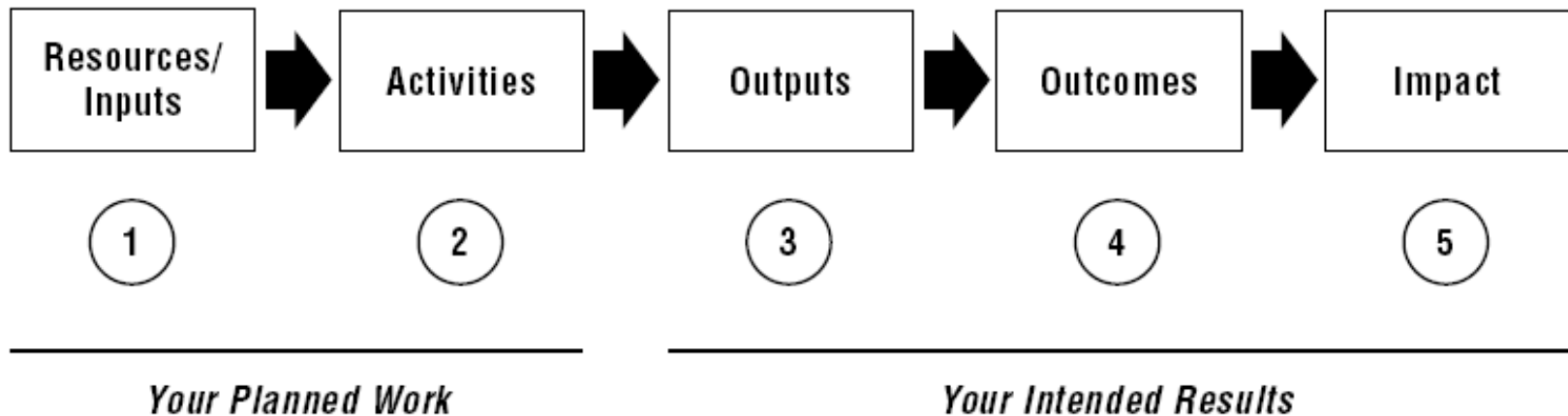
■ Target community

- Involve key players in program development
- Delegate tasks to different groups of people/constituents or community members

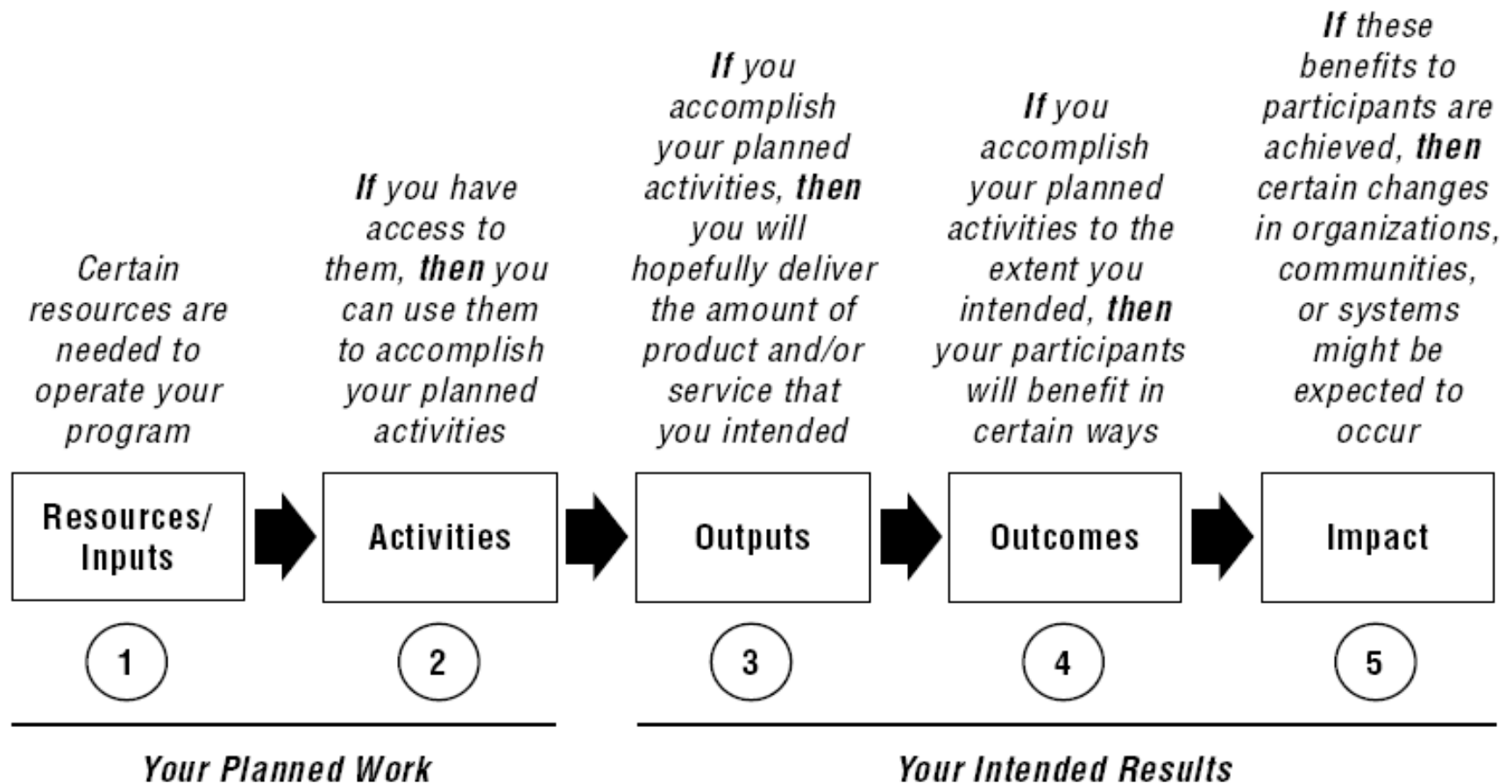
WHAT IS A LOGIC MODEL

- A logic model is a “map” of the project
- It is a concise way to show how the project is designed and how it will make a difference
- It is a simple, logical illustration of...
 - What you do (objective) to address an issue
 - How do you do it (input & activities)
 - How will you know if you are successful (in immediate-intermediate-long terms)
- It verifies logical connections among project components (goal, objective, input, activities, output & outcomes) for funders, managers and evaluators

BASIC LOGIC MODEL



HOW TO READ A LOGIC MODEL



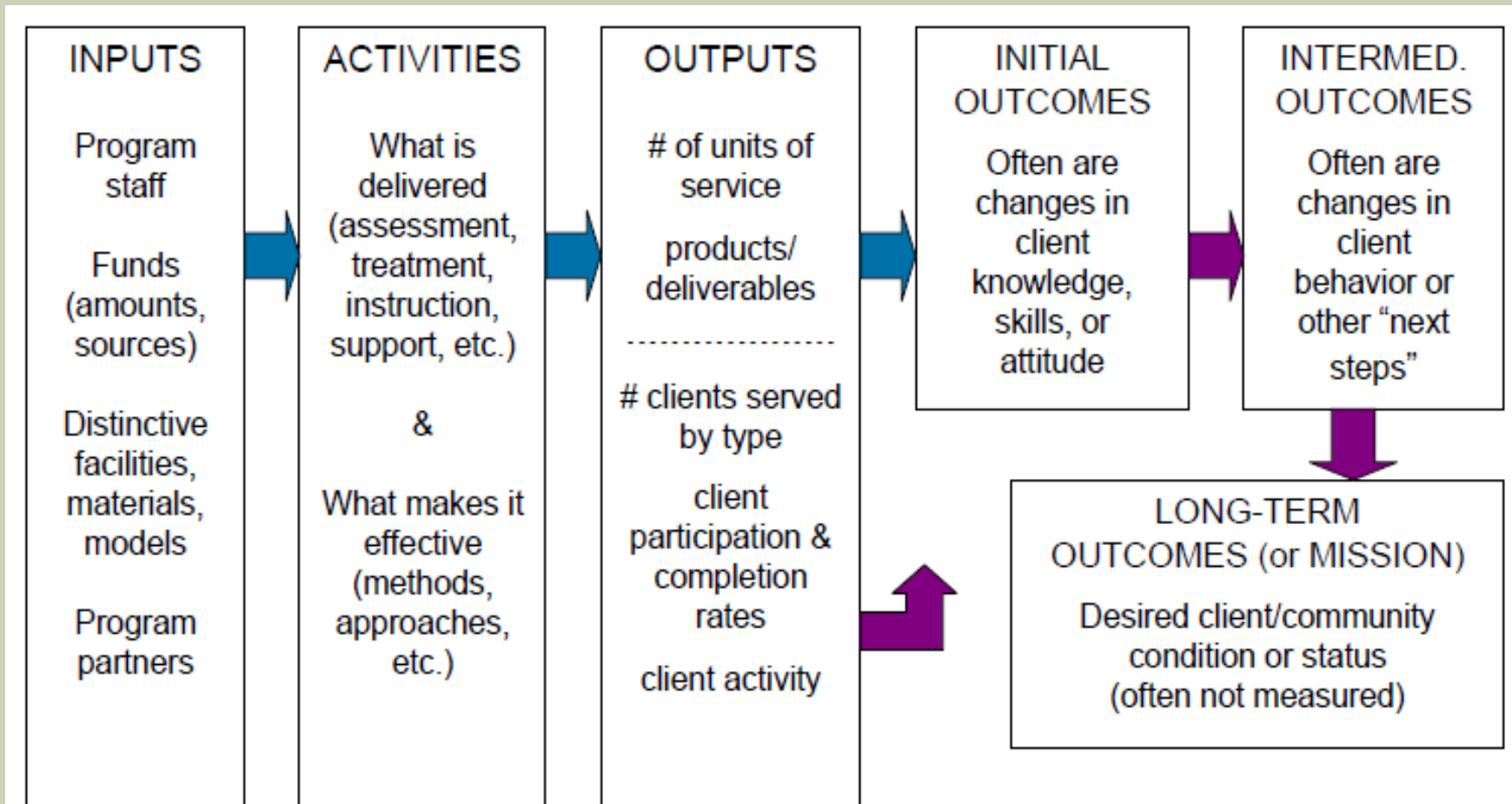
HOW TO DEVELOP A LOGIC MODEL

- Think systematically about what a project is set to accomplish and how it will be implemented
- Develop a complete list of goals & objectives
- For each objective, list all resources (input) and actions (activities)
- List all reasonable outputs and output measures anticipated (# of clients served, etc.)

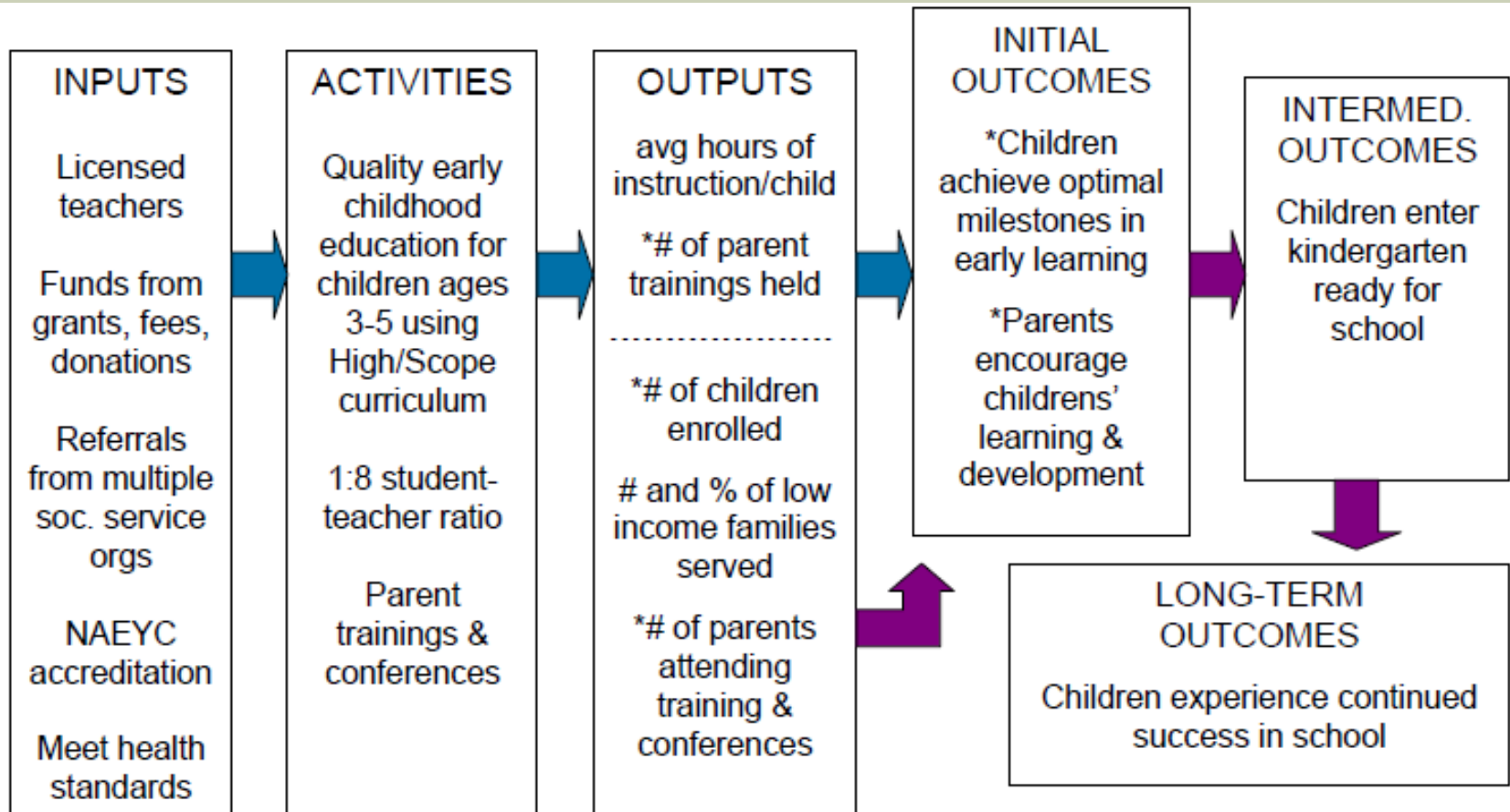
HOW TO DEVELOP A LOGIC MODEL

- List all reasonable outcomes anticipated, by immediate, intermediate and long terms
 - Short term outcomes
 - Changes in skills, attitudes and knowledge
 - Intermediate outcomes
 - Changes in behavior and decision making
 - Long term outcomes
 - Changes in status and condition
- Illustrate linkages among all these elements on a logic model template (one per objective)
- Include external factors, assumptions & barriers

LOGIC MODEL TEMPLATE



LOGIC MODEL SAMPLE



WHAT IS PROJECT MONITORING

- Project monitoring is the systematic & continuous process of data collection and information gathering throughout the life of a project
- Monitoring the implementation of a project helps in tracking achievement of objectives, and in understanding changes, if any, needed to be made for success
- Monitoring improves accountability (upwards, horizontal & downwards)
- It helps with all three universal evaluation questions:
 - Are we doing what we intended to do?
 - Are we making any difference?
 - Are these the right things to do?

WHAT IS PROJECT EVALUATION

- Project evaluation is the systematic process of collecting and analyzing information about a project in order to make necessary decision about the project
- Project evaluations help to make project better
- Project evaluation can include any or a variety of 35 different type evaluations
- Two main type evaluations for improving project & services: process evaluation and outcome evaluation

WHY EVALUATION IS IMPORTANT

- To verify that the organization is doing what it is supposed to be doing
- To understand and increase the impact of services on clients
- Improve the service delivery mechanism to be efficient
- Funders increasingly demand evidence of project success
- To provide valid comparisons between projects to make right decisions on resource allocation
- To produce data or verify results that can be used for public relations, marketing and promoting services
- Should be an integral part of the planning process

PROCESS EVALUATION

- Systematic method of verifying whether the project is being implemented as designed/planned
- Aka – formative evaluation
- To determine the extent to which the project is being implemented
- To provide managers feedback on the quality of implementation
- To provide program accountability to funders & stakeholders
- To make adjustments in order to improve the quality of the project during implementation

OUTCOME EVALUATION

- Systematic method of collecting and analyzing data to assess the effectiveness of a project
- To not only measure the change resulted from a project, but also to establish that the project contributed to the change
- Short term outcomes
 - Changes in skills, attitudes and knowledge
- Intermediate outcomes
 - Changes in behavior and decision making
- Long term outcomes
 - Changes in status and condition

STEPS IN EVALUATION

- 1) Form a working group
- 2) Determine the evaluation purpose and audience
- 3) Review the logic model
- 4) Identify evaluation questions
- 5) Choose the methodology
- 6) Collect and analyze the data
- 7) Report evaluation findings

THE RIGHT EVALUATOR OR TEAM

- **Hiring an outside evaluator**
 - Pros: objective, expertise
 - Cons: expensive, may lack adequate knowledge about the issue and stakeholders
- **Using an in-house evaluation team supported by an outside consultant and program staff**
 - P: less expensive, can be consistent with program objectives
 - C: staff time commitment, less objective or subjective evaluation report
- **Using an in-house evaluation team supported by program staff**
 - P: least expensive, promotes participation
 - C: lack of expertise, credibility?

THE EVALUATION PLAN

1. A discussion on the context for the evaluation, project purpose, staff, participants, clients, and other stakeholders
2. Evaluation design. Most commonly used designs are
 - Comparison of conditions before and after the project
Comparison of conditions before and after the program, using a control group
3. Evaluation questions (focusing on effectiveness, efficiency, adequacy & appropriateness)

THE EVALUATION PLAN

4. For each objective, the Plan should include detailed descriptions of:

- Types of information (socio economic data, measures/indicators on changes in knowledge, behavior, awareness, etc.)
- Source of information (clients, program staff, stakeholders, etc.)
- Criteria for selecting information sources (sampling, length of time with the program, age, gender, etc.)
- Methods for collecting information (document review, observation, interview, focus groups, etc.)
- Methods of analyzing information (statistical tools, qualitative methods, etc.)

5. Procedure for managing and monitoring the evaluation process

REPORT WRITING

Good project reports must capture clear answers, with data, for following questions:

- Has there been change & if so, how significant?
- Which target groups and how many of them benefited?
- Was the change intended? Is it likely to be sustainable?
- What made the change happen?
- How has the change resulted in immediate outcome and how will it result in intermediate & long-term outcomes?
- What are the evidences for change?
- How do change(s) compare to base-line data AND what was hoped for?
- How was the change attributable to your CSO (employees, resources, partners, etc.)