

Top 20 Questions for Project Planning

- 1) **Project identity? How to name and describe your project?**
- 2) Project goal & objectives?
- 3) **Who is your target group/ beneficiary?**
- 4) What type of services will you provide?
- 5) **What types of products (materials; tools; other) will you produce?**
- 6) Who will be your partners? Other stakeholders?
- 7) **What type of information do you need?**
- 8) What expertise do you need?
- 9) **How will you build your team using which criteria? (relevant expertise; gender balance; language and cultural considerations relevant to your target group etc.)**
- 10) How will your project be managed & who will be responsible for what?
- 11) **Will you need specific equipment, or systems? (databases etc.)**
- 12) Will you need to develop templates or other tools in preparation?
- 13) **How will you implement (methodology?)**
- 14) What type of agreements and approvals will you need at which level involving who?
- 15) **How will you monitor and evaluate progress?**
- 16) What timeframe?
- 17) **How much funding do you need?**
- 18) Is there space and flexibility for unforeseen activities—justifiable adjustments?
- 19) **What risks may interfere?**
- 20) What is your exit strategy? Local ownership & sustainability plan?

Goal & Objectives

A good planning process in principle produces a good plan, which can save the project money, time, energy & headache, concentrating resources on implementation instead of problem solving further down the line.

STEP 1 Project Goal

The project goal is an overall target the project aims to contribute to & help achieve, but is not solely responsible for .

Ex: Project aims to improve livelihoods in x province

STEP 2 Project Objectives

Project objectives are the outcomes the project is responsible for which contribute to the project goal.

- **In order to establish project objectives, it is important to map out the stakeholders; target groups who will be impacted (affected) directly & indirectly by the project.**

Your project will be successful in achieving its objectives when your stakeholders ' needs have been met.

- **With stakeholders mapped out, the next step is to identify their needs.**

It is the role of the surveyors to clarify project scope & allowances prior to carrying out the needs survey & to facilitate prioritizing 'true' needs to ensure appropriate expectation levels are set.

- **Stakeholder needs can be assessed using a variety of tools and methodologies—see Toolbox.**
- **With priority needs identified, realistic & measurable objectives (outcomes) need to be set. One popular tool is the S.M.A.R.T approach—see Toolbox.**

Inputs & Outputs

STEP 3 Project Outputs

- **Map out the outputs (activities) the project needs to deliver on in order to achieve its objectives (outcomes).**

STEP 4 Project Timetable

- **Map out the tasks associated with each activity.**
- **Identify how much time is required for each task & start/finish targets for each activity.**

Avoid concrete dates—better identify realistic timeframe ranges—which consider availability of target groups ability to participate .

STEP 5 Project Resources

Resources are all the inputs required to deliver the outputs (activities) in accordance with the timetable. For every activity, the associated required resources need to be identified. These include:

- **Human Resources:** Project team, consultants, trainers, partners & target group participants etc.
- **Physical Resources:** Buildings & equipment/ vehicles & supplies
- **Financial Resources:** Budget; In kind contributions from partners & target groups

STEP 6 Project Management

Having identified your project activities, timetable & resources, the next step is to clearly assign roles & responsibilities.

- **Who in the team will be responsible for what & when?**
- **What will be your partner's role & responsibilities?**
- **What will be your target groups roles & responsibilities?**
- **What will be your coordinating mechanism?**

M&E and Reporting

- 1) **What are your donors' requirements and expectations?**
- 2) **How will you track progress?**
- 3) **What should be your benchmarks?**
- 4) **What will be your indicators for measuring success?**
- 5) **Will you involve your partners and target groups in identifying these indicators?**
- 6) **Do there need to be different indicators for project team and partners and target groups?**
- 7) **How will the different indicators interlink and help measure progress in relation to your proposal & donor reporting requirements?**
- 8) **What types of evaluation(s) will you organize? Internal? External? Individual? Group? Activities? What frequency? Village level? Partner level? Project team level? Formal? Informal?**
- 9) **What role will your field team, your partners and target groups play in monitoring, evaluating and reporting?**
- 10) **What types of resources, tools & templates, or expertise do you need?**

Toolbox: Participatory Planning & Implementation

Target Group & Partner Identification

- **Village meeting:** helps to raise community awareness & support for the project (NB: consider different information, methodologies & communication tools to help make the meeting more informative, interactive & engaging!)
- **PSA:** Participatory Social Assessment helps to identify barriers & benefits for inclusive participation of more vulnerable or disadvantaged community members (women; ethnic; illiterate; disabled etc.) Based on the PSA, target groups can make more informed decisions about their potential participation in project & the project team can better assess & strategize gender & social inclusion considerations in its project & activity planning.
- **Partnershop:** introductory meetings with potential partners helping to identify shared priorities, working principles, objectives; opportunities & constraints; respective areas of weakness & strength which can complement and strengthen each other's potential. The results of this type of exchange can help identify viable partners (GoL; NPA/CSO; INGO; Private and other)

NEEDS Based Project Planning

Identifying the 'real' needs of your target groups is a first & critical step to ensure your project interventions are relevant and sustainable. To do this effectively there are a variety of approaches and combination of tools which can help to identify and prioritize the needs of your target groups. Some of these include:

- **Observational walks:** useful for gaining an overview & identifying social & environmental context/issues with target groups
- **Mapping:** useful for visually capturing & analyzing area, opportunities & constraints for implementation
- **PPA & PRA:** Participatory Poverty Assessment & Participatory Rural Appraisal are approaches which can use a combination of participatory tools (interview questionnaires, mapping, self assessment etc.) to collect & analyze relevant data which not only helps to identify needs but is also used for monitoring & evaluating progress.
- **Livelihood Analysis:** is a participatory exercise which helps identify target groups' strategies & priorities according to their assets (social; physical; human; natural; financial & political) Based on the results, activities can be identified & planned.
- **S.W.O.T:** is an analysis tool used to identify Strengths, Weaknesses, Opportunities & Threats
- **Matrix scoring:** is a tool which helps compare & rank options as well identify criteria & 'trade-offs' between the alternatives helping to select & prioritize.

SMART Objectives

Based on the priority needs identified, the project establishes a set of objectives. The SMART approach is a tool which helps to design objectives in a manner that is:

- Specific** *well defined and clear?*
- Measurable** *is the goal obtainable; how long will it take to achieve and how to know that it has been achieved?*
- Agreed** *are the objectives agreed on by relevant stakeholders?*
- Realistic** *considerate of time, resources & available expertise?*
- Time based** *is there enough time or too much time allowed?*

Participatory Activity Planning

Building on the participatory needs assessments & objectives setting, together with your target group you can now identify interested participants & with them & your partners develop your activity plans.

- **Participation**
 - 1) What will be the criteria, methodology & tools used to select participants?
 - 2) Who should be involved in preparing & executing the selection process? (*Implementers; partners; community representatives, or village leaders/elders? Gender & socially inclusive selection committee?*)
 - 3) What type(s) of agreement are needed to ensure mutual responsibility & accountability between the selected participants, village authorities & the project including partners? (*Are these adaptable to local context? Ex: local language; customs; literate vs. illiterate?*)
- **Planning**
 - 1) What level of participation will be enabled for community &/or partner inputs into planning process?
 - **Passive:** Inform; Consult; Q&A; **Active:** inter-active (*data collection, surveying,, evaluate options*); Decision making/veto
 - 2) What aspects of planning will the community &/or partners participate in?
 - Activity (Subject & Methodology: training on seed selection; study tour on farmer group formation etc...)
 - Scheduling (activities; meetings; M&E etc.)
 - Location/ area selection (ex: demonstration plots)
 - Identification & assignment of roles & responsibilities/ Gender & inclusion analysis
 - Financing & other contributions (in kind: space; labour...)

Participatory Activity Implementation

Based on the agreed plan and roles & responsibilities, additional considerations ensuring ownership & sustainability of implemented actions for the target group & partners can include:

- 1) What communication, decision making & coordinating mechanisms will be used in case of grievances, required changes or unforeseen risks during implementation?
- 2) What 'joint' community activities can be organized during implementation to mitigate 'separation' between participating & non participating community members?
- 3) If facilities are built, or assets invested in, will ownership of these be legally transferred at the end of the project to the community? If so what will be the criteria & management agreement terms? Incentives: financial or in kind for community assigned human resources ?
- 4) What types of agreements need to be facilitated with relevant authorities to ensure agreements with communities are supported and recognized after the project (Ex: community land titling; protected forest areas; local market set-ups etc.)

Participatory M&E and Reporting

- **Monitoring**
 - 1) **Community timelines** for identifying & tracking benchmarks
 - 2) **Participant Log books** for monitoring inputs & outputs
 - 3) **Activity calendars** for monitoring planned vs. actual implementation & results
 - 4) **Field visit & interviews** for monitoring progress, identifying constraints
- **Evaluating & Reporting**
 - 1) Individual surveys
 - 2) Focus Group exchanges
 - 3) Stakeholder meetings
 - 4) Wealth & wellbeing ranking ; capacity built; value added; lessons learnt; objectives achieved; participation & inclusion; transparency & cost effectiveness; sustainability

Community Voices

- Community notice board
- Community 'Help desk'
- Community voice cards & drop box
- Community complaints committee or Ombudsman
- Community Theatre & role play

Downward Accountability

- 1) Participation
 - 2) Decision making
 - 3) Transparency
- During planning: **Public Hearing**
 - During implementation: **Public Review**
 - During evaluation: **Public Audit**

Participatory Project Planning & Activity Implementation

Project?	Objectives?	Goal?
Beneficiaries?	Stakeholders?	Partners?
Target Area?	Resources?	Budget?
Timeframe?	Activities?	Agreements?
Gender Inclusive?	Needs Based?	Pro-Poor?
Outputs?	Impacts?	Outcomes?
Implementation?	Evaluation?	Monitoring?
Quality?	Downward Accountability?	Quantity?
Ownership?	Criteria?	Sustainability?
Risk?	Information?	Exit Strategy?
Communication?		Reporting?