

# **Plan and Manage Distinct Community Development Projects Level 4**

## **- Learner Manual -**

### **The development practice project**

These learning materials were generated by the Development Practice project, hosted by the [Sustainability Institute](#) and in partnership with [Community Connections](#), [AIDS Consortium](#) and [Keystone](#). This project generated a set of competence standards with development practitioners in Cape Town, Johannesburg and Durban, between 2005 and 2009. This manual is part of a set of materials consisting of a competence standard, learner's manual, facilitator's guide and an assessment tool. More information on this project is available on the [Development Practice](#) website.



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- The project team for logistics, coordination and editing

Questions and queries on the project and materials can be forwarded to [info@developmentpractice.org.za](mailto:info@developmentpractice.org.za).



# LICENSING

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## OVERVIEW

Welcome to this manual – ***Plan and manage distinct community development projects***. During this manual you will learn how to plan and manage community development projects in your organisation. Some of you are already managing projects and others may only now be starting. Effective project management is essential to ensure good delivery and accountability. A practical and planned approach to managing your project is an important part of any successful organisation.

This learner manual, accompanied by a facilitated programme of activities, should be followed up by practical ‘on-the-job’ experience and practise (supported by a mentor if possible). Once you have read through this learner manual, done all the exercises, implemented the learnings in your organisation, you will be ready to have your competence assessed, if you choose.

Below follows the Specific Outcomes and Assessment Criteria that this learner manual is based on. This means that at the end of your learning period, you will be able to practice all the points listed below. During the learning period you will be reminded to keep and file proof of your work. This is called a Portfolio of Evidence. It is a collection of evidence to show what was learnt during the course and from past experience, including all other training courses attended. Recognition of prior learning (RPL) is when all your learning is taken into account and acknowledged when assessed for a specific standard. Outcomes are the result of your learning. At the end of each section there is a symbol for you to check your understanding. Please read the competency standard below carefully.







## SPECIFIC OUTCOMES AND ASSESSMENT CRITERIA

Specific outcomes	Assessment criteria
<i>Competence in this standard means that the learner has clearly shown that s/he is able to...</i>	<i>Tasks and activities completed by the learner contain the following evidence of competence...</i>
Facilitate participatory community appraisals (contextual analyses) that reflect the voices of the constituency group	<ul style="list-style-type: none"> <li>• Have assisted members of the target constituency to identify problems that need to be addressed in their context.</li> <li>• Have assisted the constituency describe a vision of success for the project (its specific objectives - what it intends to achieve) – what they hope to achieve and what success would look like.</li> <li>• Have mapped the assets and capabilities that exist within the target constituency.</li> <li>• Have identified relevant factors and actors, within and outside the target constituency, that could support or threaten success</li> <li>• Have explored possible collaborative relationships to enhance intended outcomes</li> </ul>
Generate a brief concept paper	<p>The concept paper describes:</p> <ul style="list-style-type: none"> <li>• What <b>outcomes</b><sup>1</sup> the project expects to achieve.</li> </ul>

<sup>1</sup> **Outcomes** are the intended results or impact of the intervention – what actual changes will have taken place in the target constituency or constituencies as a result of the intervention.



<p>outlining the agreed project objectives and planned activities.</p>	<ul style="list-style-type: none"> <li>• How the project is aligned with the mission of the organisation, why it is important and who will benefit.</li> <li>• A set of specific <b>outputs</b><sup>2</sup> (or activities and products) for the project.</li> <li>• What activities will be required in order to achieve the outputs.</li> <li>• How the plan reflects the voices of constituents.</li> </ul>
<p>Develop a detailed work plan for the project</p>	<p>The work plan for the project describes</p> <ul style="list-style-type: none"> <li>• Clearly defined activities that are appropriate to the objectives.</li> <li>• Clear lines of responsibility - who will implement the activities.</li> <li>• Clear time frames for the completion of activities.</li> <li>• What financial and non-financial resources will be required and where these will be sourced.</li> </ul>
<p>Anticipate possible disruptions to the plan.</p>	<p>Possible disruptive factors are described and strategies to deal with these are suggested.</p>

**Note:** Tasks may be presented for an actual or hypothetical organisation but must be learner’s original work and not copied from existing documents. Learners should be able to explain and justify their statements

<sup>2</sup> **Outputs** are the planned **activities and products** of the intervention. For example a set of training workshops, a counselling programme, a publication, a survey etc.



## ACTIVITIES

There are a number of activities in the manual. These are an important part of the learning approach and you are encouraged to complete these activities as part of your learning process. They will become part of your own “toolkit” to help you mobilise resources more effectively. Some of these activities can also be used as part of your portfolio of evidence, which you need to compile if you wish to be assessed for competence in this standard.



## Symbols used in this workbook



### Important thought

This sign shows an important thought or idea for you to take note of.



### Definition

When you see this sign, a term is explained here.



### Self-test

This designates a self-test section - this is an opportunity for you to check your understanding and if you are unclear, to discuss with your trainer.



## Case study/Example

Case studies or examples will tell you about a practical application of something that has been discussed or covered in the course.



## Individual activity

This sign marks an activity – either during the class or as homework. These activities are important to complete – both for your understanding but also as they can be included as part of your Portfolio of Evidence for assessment.



## Group activity

This sign means that this activity is a group work activity.



## INTRODUCTION

If you visit the poorest areas in South Africa, or even the most remote part of the country, you will nearly always find a small community project or someone working hard to improve the community in which they live. Community organisations are a vibrant and important part of civil society, that often fill the gap between the needs of the people and the services that government is unable to provide. It is the work of many small, dedicated groups of community volunteers and passionate development workers that are essential to the development and growth of our communities.

Community organisations take many forms and have many different purposes. During Apartheid many community organisations played an active role in the struggle and were activist in nature. Now many community organisations exist to provide support to the community or a service that the government cannot. From their history and their role, many community organisations are very informal in structure and operation. This course will assist you to plan and manage community development projects in your organisation.



## What is a project?



### Definition

A Project is defined as a set of activities that:

- has a specific result (**output**) or set of planned activities that are linked with the organisation's strategic goals;
- is planned and implemented within a **specific time frame**;
- has specific **inputs (requirements)** of financial and non-financial resources

A project is a selected set of activities that have to be done in a particular order using identified resources (time, money, people, materials, energy, space, provisions, communication, quality, risk, etc.) to meet the planned objectives.

A project has the following **features**:

- A **start and a finish** date
- A life cycle (beginning and end with a number of separate phases)
- A **budget**
- Activities that are specific to this project



- Use of resources that need coordination
- A **single point of responsibility** (Project manager)
- **Team roles** and responsibilities (that need to be developed, defined and /OR established)

**Notes:**

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**Definition**

**Output:**

Planned activities or products of a project/ organisation

**Input:**

What is needed to make these activities or products



## Worksheet 1



### Individual activity

What is a project? Describe a project/s that your organisation currently does:

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Explain how your project has 3 of the **features** of a project (mentioned above):

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## What does it mean to manage a project?

Management is a process of planning, organising, leadership/ coordination and control. In simple terms, project management involves making the project happen.

A more detailed definition of Project Management follows below.



### Definition

**Project management** is a planned and organised **effort to complete a specific (and usually) one-time effort**, for example, a campaign or training a certain group.

Project management includes **developing a plan**. A plan should include project goals and objectives, specifying how goals and objectives will be achieved (tasks), what resources are needed to achieve the goals and objectives, and allocating budgets and timelines for completion.

It also includes **implementing the project plan**, along with careful controls to stay focussed; that is, to ensure the plan is being managed according to the plan.

Managing a project involves ensuring these areas are all taken care of:

- Time
- Cost (finances)
- Resources
- Human resources and relationships
- Quality

## The role of a project manager

The role of the project manager is to direct, supervise and control the project from start to finish. Ideally, project managers should not do all the project activities; but they should focus on managing the project. The project manager bears the ultimate responsibility for making things happen. Some of the activities that must be undertaken include:

1. Defining the final goal and objectives of the project with the team and stakeholders
2. Reducing the objectives to a set of manageable tasks, allocating budget and obtaining resources.
3. Assessing risks/ possible challenges to the project and reduce or stop them
4. Communicating with stakeholders and informing them of progress on a regular basis
5. Adapting the plans to accommodate changes



6. Leading and motivating his/ her team to complete the project on time

The challenge for a project manager is to ensure that the project is delivered within the definitions of project scope, cost and time. Managing a project is maintaining control over these different parts, lessening risk and ensuring that the final product is of good quality.



The role of the project manager is discussed in more detail in the section on implementation.

## Qualities of a project manager



### Individual activity

#### Qualities of a project manager

What do you think are the necessary qualities and characteristics of a good project manager?

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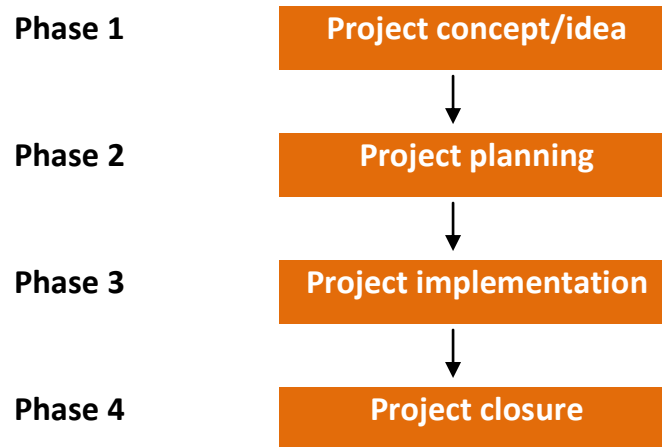
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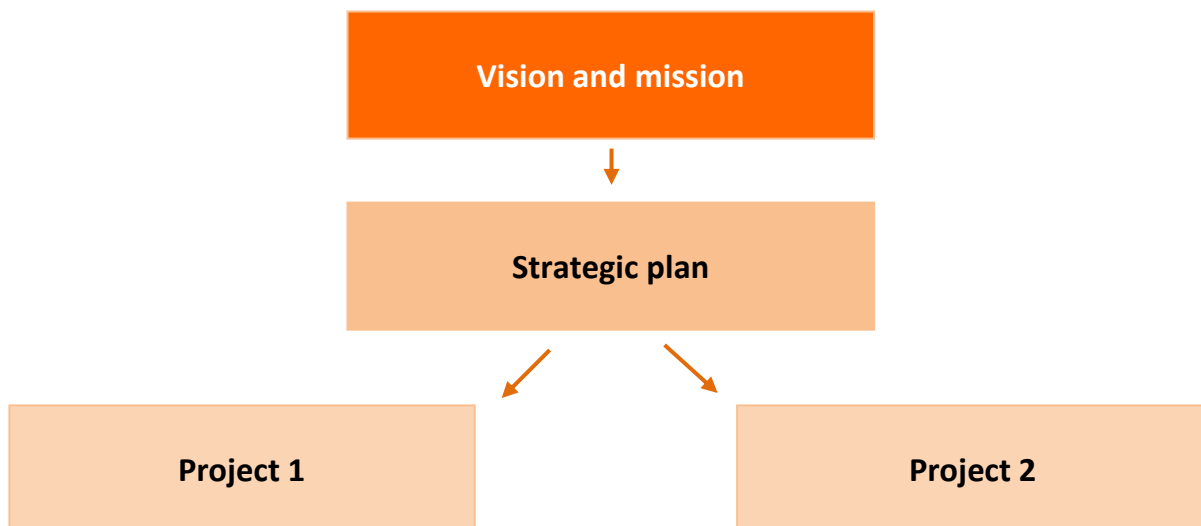


## The life cycle of a project

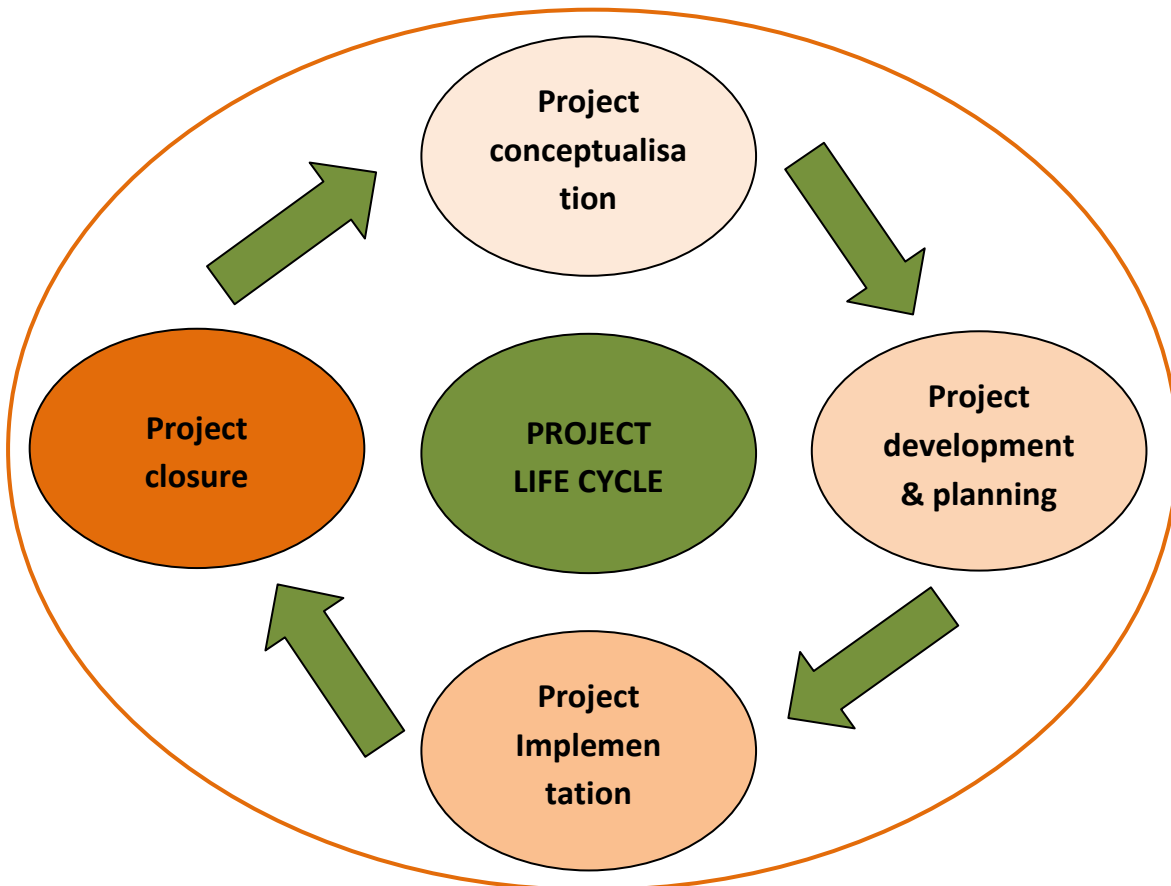
Projects go through mainly FOUR phases – this is called the **Project Life Cycle**:



In the NGO environment, this includes more elements. Any project in a NGO or CBO needs to relate to the vision and mission of the organization. Therefore, in the NGO environment, projects exist in the larger programme/ strategy of the organisation.



Each project then has its own cycle – a beginning and an end as shown below. It works as a cycle – at the end of the project, the lessons learnt and the experience gained, is used to inform the next project. You need to stop and reflect at the end of any project so that you can learn from the past and this helps improve projects in the future.







## Group activity

In groups, add these words where you think they fit onto the above project cycle.

- Needs assessment
- Project selection
- Monitoring
- Evaluation
- Detailed individual work plans
- Problem Identification
- Stakeholder analysis
- Project scope



## Self-test

You should be able to answer the following questions:

- Can I describe a **project Life Cycle**?
- Do I know what **inputs** and **outputs** are?
- What are some of the features of a project?

Please ask your facilitator if you are unsure of any of the above.



## PROJECT CONCEPT

### Identifying a Project

Before starting any project, an organisation needs to spend time thinking about why they want to do the project, who it serves and getting agreement from the beneficiaries and stakeholders. This is called project conceptualisation.

It is important because it makes sure that good, effective projects are delivered that are useful to the community.

In the past, people started projects in a community without much planning, consultation or community participation. Often these projects and services created dependency on the NGO and didn't build on the strengths and abilities of the community, and sometimes were not relevant to that community.

Therefore before starting a project, you need to go through these steps of Project Conceptualisation:

1. Identify the needs in the community – write this up into a problem statement
2. Identify the priority (the most important) issue
3. Develop a project Aim



4. Brainstorm different ideas about how you could achieve this aim/ solve the problem (different projects)
5. Select the project that best meets the needs of your community and that the organisation is capable of delivering.

At every step, you need to consult with the stakeholders of the project.

*These elements will be discussed in more detail in the sections following.*



## Definitions

### **Aim**

What the project hopes to achieve – example: to build capacity of women in the Gauteng region, to manage their daily health needs.

### **Stakeholder**

Person/organisation with interests in a project.

## Needs Assessment: Understanding the needs of your community



### Definitions

#### Needs Assessment

The process of investigating the needs of a community.

The starting point for a project is usually to address a problem or a need. This always needs more investigation so as to be sure that the project you choose will be appropriate to the community. This can be done by informal conversations in the community, surveys, observed (and documented) information or formal research.

You can use the questions below to guide your investigation into the needs:

- How did you find out about the problem?
- Who told you?
- Who else feels that this is a problem?
- Where else can you find information about this problem?
- How can the community forums assist in finding out more about this problem?

- What does this information tell you about the problem?
- Is this problem felt by many people?
- What resources exist within the community to resolve these issues?
- Are there other organisations working on this problem?
- Where does this service need to be improved? Are there people without services?
- What is the gap?
- Can your organisation improve this situation?
- Who agrees with you?

Most community organisations have a good idea of the need in the community because they live within the community, but never write this down into a formal document. You need to do this so that you can use this when explaining your project/ programme.

## **Consulting with Stakeholders**

To further understand the need and ensure that the community is involved in the creation of your project, you will need to consult with the various stakeholders that have an interest/ role in the community. You need to do this, at all times during the project life cycle.



Who are the stakeholders? Stakeholders can be both within your organisation and from outside the community.

Examples of stakeholders are:

- Government departments
- Staff
- Volunteers
- The clients/ beneficiaries of the Project
- Other organisations doing similar work
- Relevant Forums and Networks

**How to identify Stakeholders:**

- List final decision makers
- List people who will be affected by the outcome
- List people who have the power to assist or block a decision
- For each person or group, identify what success; or the “win”, might be
- Select attendees for the meeting who can represent all stakeholders’ points of view

## Worksheet 2



### Individual activity

#### Writing your problem statement

In groups, select one need/ community that you would like to focus on. You will be using this example as a case study for the course

Write a problem statement for this using these questions as a guide:

- What is the problem?
- How did you become aware of the problem?
- Who are the specific groups (of people) that are most affected by this problem? (For example: women, men, children, older people, people who are infected with HIV/AIDS, people who are affected by HIV/AIDS). Describe the background of these groups as well as their specific needs.
- Which geographic area do the affected people live in?
- What is the extent of the problem?
- What factors are contributing to the problem?

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List some of the stakeholders that you would need to talk to about or for this project?

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How do you do needs assessments in your community/ project? Are there any other things you could do, to improve your needs assessments?

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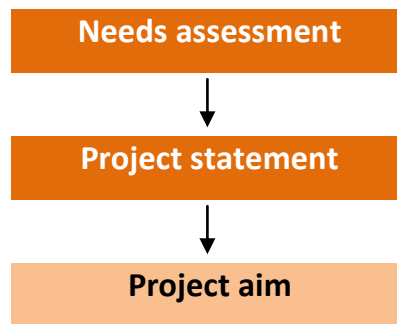
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## Project aim

The Needs assessment has helped you better understand the issues in your community. There will be many problems and issues identified. Based on these needs, and together with the beneficiaries and stakeholders, you need to decide on the **priority issue/ problem**. Which problem will your organisation/ project try to address?



Once you have decided this you need to write this up as a **project aim**. An aim is your organisation's goal – what you hope to achieve by this project. It is the solution to the problem that you identified and should be linked to your vision and mission (it may even be part of your mission).



## Case study

### Impilo Community Project

Impilo Community Project is based in Meadowlands, Soweto. Their vision is to see a developed and vibrant community of Meadowlands, where all people are supported to live healthy lives, free of discrimination and AIDS.

For the last couple of years, their community workers have reported that a number of their clients are struggling to stay healthy as they are too poor to afford food and often do not know about nutrition. This is particularly important for their HIV positive clients who cannot get food parcels before they are on treatment, but want to stay healthy so that they can wait before taking ARV's.

The clients don't want to get food parcels but want to do something to improve their lives and health. The clinic sisters and local HIV support groups also described a similar need.

Project aim... To improve the health and good nutrition of HIV positive (and ill) people in the Meadowlands Community over a 1-year period.

It is this aim that helps guide us, as to what to do. It is a goal that we would like to achieve. Sometimes an Aim is also called a Desired Outcome.

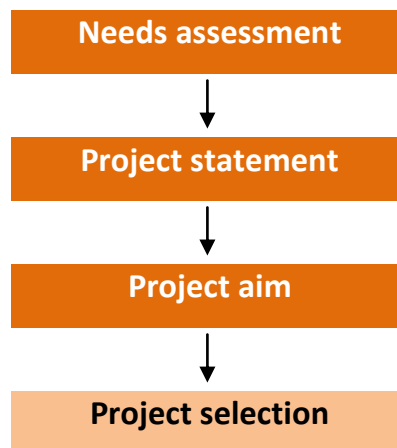




## Project selection

You have done an assessment of needs and written a problem statement. In consultation with others, you have chosen your priority issue and written a project aim.

Next you need to work out which project would work best in achieving this aim. All the possible options should be discussed so that the best one can be chosen - this process is called **Project Selection**.



A good way of doing this is called Brainstorming.

### 1. Brainstorming

- Get as many knowledgeable people together as possible, including those who are most affected by the issue (beneficiaries and

stakeholders), and come with up with as many ideas about what is needed as possible. Do not judge or choose between ideas yet.

## **2. Select a project**

Start to sort the ideas – Think about which is a good idea based on these criteria:

- Will this work in our community?
- Can we afford this type of project?
- Do we have the skills/ capacity (or can we get the skills) to run this type of project?
- Will it meet the need that we identified in our needs assessment?
- Will it help to strengthen and develop those in need?

## **3. Present your project to stakeholders**

Once you get agreement from all, present your aim and project ideas to the stakeholders for their feedback. Some stakeholders will support the project, others will not. It is important to speak to those who are against it and discuss their fears, because it is these stakeholders that could stop your project, particularly if they are in a powerful position.

Sometimes you need to complete more detailed planning before selecting a project, because you need to find out how much it would cost to do this project and whether it would be financially possible.











## Self-test

You should be able to answer the following questions:

- Do I know how to do a **Needs Assessment**?
- Can I explain what an **Aim** is?
- Do I know **who to include in a stakeholder** meeting?

Please ask your facilitator if you are unsure of any of the above.

## PROJECT DEVELOPMENT AND PLANNING

“Failing to plan, is planning to Fail!”

Alan Lakein

### Project Planning – An overview

Before you start doing anything, you need to plan. The better you plan, the easier your project will be to implement. Often as an NGO/ CBO you also need to plan, because without a project proposal, one cannot get funding.

A good, well-thought out plan, is a benefit to the organisations.

#### Steps to Good Planning

1. Diagnosis – What are the problems? What are the needs?
2. What do we want to achieve? What is our aim?
3. What are the ways of achieving this? (Project selection)
4. Who will do what, when, how and what will it cost?
5. How will we evaluate and ensure quality?

## Project Scope – More information about the project

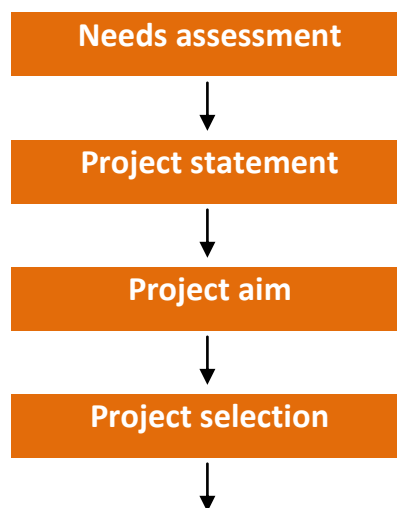
You have decided on your aims and the project that you want to do. Now you need to do a project scope.



### Definition

#### Project scope

A project scope says what your project does and doesn't do. It gives more information about your project and gives more detail. The project scope describes the boundaries of the project. It tells you where the project begins and ends. Developing a clear project scope and communicating it with your project team and key stakeholders is very important.



## Project scope



### Case study

#### Project Scope

This project works in Meadowlands, Soweto running a vegetable garden that provides food weekly to people (children and adults) who are part of HIV support groups at local clinics and nutrition awareness programmes for all the support groups and schools in the area. Beneficiaries need to be unemployed adults or children from families without income and they need to participate in the project in order to benefit.

The produce will not be for people on ARVs as they will instead be linked to food parcels. This project will run for a year and then be reviewed by all the stakeholders. We will hold regular meetings with the beneficiaries, the clinics and schools to check progress.

When you describe your project in more detail, you stay away from surprises and misunderstandings - making sure that the project is understood by everyone. Now you and the project stakeholders (including staff) have the same expectations.



When writing a project scope, you should cover/ describe the following areas:

- Who are our beneficiaries?
- Where will we work?
- What are our objectives (see more on objectives below)?
- What is the timeframe for our project?
- How will we communicate with our stakeholders?
- How will we make sure we run quality programmes?



### Group activity

In your group, write a project scope for your case study project.

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## Objectives



### Definition

#### Objectives

Objectives describe the specific activities that the project will deliver (what you will do). Objectives are detailed statements describing what the project is trying to achieve. Objectives should be **SMART**:

<b>S</b>	<b>specific</b>
<b>M</b>	<b>measurable</b>
<b>A</b>	<b>action-oriented and achievable</b>
<b>R</b>	<b>realistic</b>
<b>T</b>	<b>time-bound</b>

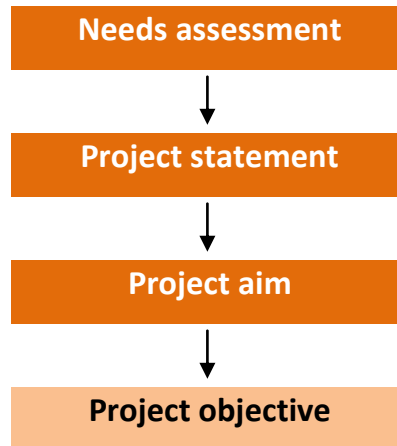
The **aim** of the Aids Consortium Capacity building project is to enhance the quality of services provided by Community Based Organisations (CBOs) to people infected and affected by HIV.



Objectives might be to:

- Train 60 CBOs in Gauteng on CBO management by the 30 April 2007
- Mentor 60 CBOs in CBO management by the 30th July 2007
- Develop toolkits on CBO management by the 30th July 2007
- Sign new CBOs as affiliates of the AIDS Consortium by the 15th December 2007

Looking at the objectives above, you can see that they are more specific than the aims, they are measurable (how many CBOs to be trained), they are achievable and they are within specific time (it is clearly stated by when they should be finished). So the objectives are what the project needs to do (the deliverables).



Well-explained objectives ensure that project stakeholders have:

- A common understanding of what the project is attempting to do and
- A commitment to the same objectives.





## Case study

### Aim

To improve the health and nutrition of HIV positive (and ill) people in the Meadowlands Community over a 1-year period.

### Objectives

- Set up a community food garden, for the Meadowlands area from March 2008 – February 2009
- Provide vegetables weekly to 20 people who are infected by HIV
- Provide nutritional workshops for 60 people in support groups and schools between April 2008 and February 2009
- Set up 20 small scale food gardens with community members by February 2009

Are these above objectives, smart? Please tick the boxes and discuss if you think they are not.

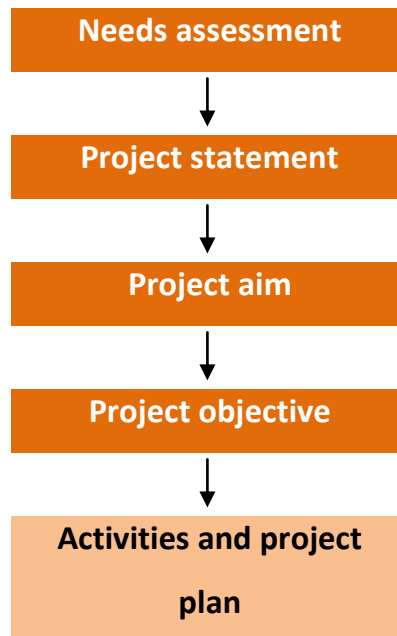
- Specific
- Measurable
- Achievable
- Realistic
- Time-bound





## Detailed Planning – Using a project plan

Once the aims and objectives of the project have been decided, your next step is to write up what you and your team actually need to do, and how to do it. This is a detailed plan for all the tasks that need to be done.



It is important to take time for planning so that the project runs on time and does not go over budget. With good planning, everyone involved understands what is wanted, and so can work well together. If any problems appear they can be noticed long before they cause harm.

To coordinate a project you need to plan for these areas:

- Resources
- Staff
- Finances
- Quality and Monitoring
- Risk

Each objective needs to be broken down into all the tasks that it takes to make it happen – we call these tasks **Activities**. For each activity you will need to identify timeframes, a person who is responsible, the resources required (and calculate their costs) and decide how you will check the activities to see if they have been completed well.

All this information is then put into one plan. An easy way to do this is to use a **Project Plan** for this (see section on project planning). You need to complete one project plan for each objective.

### **Activities**

What work will you do to achieve the objectives?





## Group activity

1. Using coloured pieces of paper, write down all the steps it would take to make an objective happen (put each step on a different paper).



## Case study

### Objective:

Set up a community food garden for the Meadowlands area from March 2008 – February 2009.

These are some of the activities that it would take to achieve this objective:

- Buy equipment and garden supplies
- Identify and secure agreement for a site for food garden
- Prepare soil and plant the Garden
- Maintain the garden and distribute produce
- Identify volunteers (beneficiaries) for garden
- Train volunteers in food gardening skills.
- Set up 20 small scale food gardens with community members by February 2009

2. Now put these in the order that they need to happen. You can use a wall to organise your steps on (see the next page for an example).

*For example, you cannot prepare the soil and plant the garden until you have bought the equipment and garden supplies.*

3. Now write these activities into the project plan provided below.

4. Using the guide below, fill in the other columns on the project plan.

### Notes

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### **Timeframes**

When will you do these activities? Write down when each activity will take place and when it will be completed (start and completion dates).

### **Persons responsible**

Who will be responsible for carrying out the activities? Who will be responsible for making sure that the activity takes place?

The person responsible might not be the same person who does all the actual implementation, but they are the person who is held responsible for it happening.

### **What do I need and what will it cost? (Resources required)**

What materials, equipment, staff and facilities do you require to undertake each of the project activities? Calculate the costs of each of these requirements.

Remember – if you do not have the capacity/ skill to run parts of your project, this should not stop you, but you need to plan how you will get the skill/ capacity that you need.

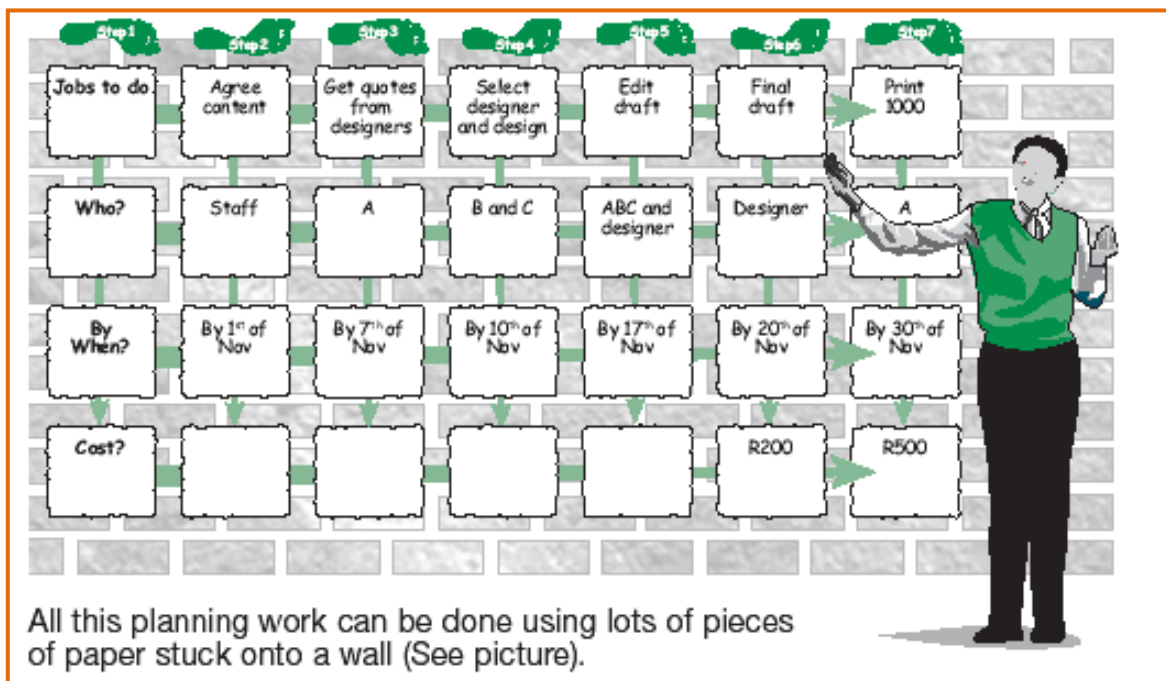


### How will I know that I am successful? (Outputs and Indicators)

What are the project outputs (the services or goods that will be produced by the project through the activities done)? What are the things that will show I am successful?

What signs (indicators) will you keep to record the progress of activities? For example what signs/ proof will you keep to show what you are achieving (for example registration lists, evaluation forms, minutes etc.)

*The example below shows steps it would take to design and produce a leaflet:*



*Picture with thanks to: The New Toolbox by Camilla Symes*



**Example project plan for case study**

<b>Aim/s:</b>	To improve the health and nutrition of HIV positive (and ill) people in the Meadowlands Community over a 1-year period.			
<b>Objective:</b>	Set up and maintain a community food garden that teaches people about food gardens and gives food weekly to about 20 people from the Meadowlands area from March 2008 – February 2009.			
<b>Activities</b>  What are the things that we need to do to achieve the objective?	<b>Time frames</b>  when will it be finished?	<b>Person responsible</b>  Who will be responsible for this?	<b>Resources needed</b>  What do I need and how much will it cost?	<b>Outputs and indicators</b>  How will I know I'm successful? What proof will I keep?
Identify and secure agreement for site of food garden	March 2008	Project Manager	Project manager's time	Agreement with school
Identify volunteers (beneficiaries) for garden	March -April 2008	Support group coordinator	Support group co-ordinator	List of volunteers. Minutes of meetings
Train 20 –30 volunteers in food gardening skills	April – May	Project Manager	Training will be for free	20-30 trained volunteers



	2008 (ongoing)	together with Seed for Life NGO	Transport to venue: 30 x R10= R300/day x 5 days	Attendance register Certificates
Buy equipment and garden supplies	April 2008	Project Manager	Hoses & spades = R1500 Seeds & seedlings R1200 Fertilizer & Compost R800 Fencing = R2000 Shed for storage	Well-equipped food garden.
Prepare soil and plant Garden	May 2008	Project Manager	volunteers	Planted garden
Maintain garden and distribute food	May 2008 – February 2009	Project Manager	<u>Per month</u> : water R200; Fertilizer & pesticide R350	Record of food distributed and received.



**Project plan (complete a separate table for each project objective)**

<b>Aim/s:</b>				
<b>Objective:</b>				
<b>Activities</b> What are the things that we need to do to achieve the objective?	<b>Time frames</b> when will it be finished?	<b>Person responsible</b> Who will be responsible for this?	<b>Resources needed</b> What do I need and how much will it cost?	<b>Outputs and indicators</b> How will I know I'm successful? What proof will I keep?



## Anticipating challenges or set backs

Before you start implementing your project, you need to think about some of the possible challenges or setbacks that your project might have.

For example, have you thought about the fact that transport costs might stop people from attending your meetings? What plan can you make to fix this? If you take the time to think about some of the challenges, then you can make a plan to fix these or prevent them happening.



### Group activity

In your group, think about some of the setbacks that your project might have to deal with? What can you do about these?

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## PROJECT IMPLEMENTATION

Now that you have done all your planning for your project, it is time for doing (implementing). As an NGO/CBO, if you have received funding or are delivering a service, this is particularly important as you have a contracted responsibility to implement the activities in your plan.

In order for a project to be successfully implemented, all these areas need to be coordinated and taken care of:

- Time and Task Management
- Human Resources (staff and volunteers) Management – supervision of staff and/or volunteers and regular team meetings
- Financial Management – monitoring of financials
- Quality management
- Risk management
- Communication (which includes Reporting)



Someone will need to be responsible for the overall co-ordination of the project (sometimes called the project manager) even though they are not normally responsible for doing all the tasks. Tasks need to be shared amongst staff and stakeholders in order to share the workload but also to build capacity.

The role of the project co-ordinator is to make sure that these areas are in control (without being controlling and taking away the independence of people).

As soon as implementation starts, a project develops a life of its own, which may be very different from what you have planned. You need to set up ways of checking on the project and guiding its progress. It helps to have:

- Set short term goals for your team
- Have regular progress meetings/ reports
- Agree on a communication plan with your team

## Time and Task Management



In the planning phase, you wrote a project plan – now you need to use it in the daily running of your programme to keep checking how you are doing and to make sure that everything gets done on time.

To help you manage time and use your project plan, you need to do:

- Calendar planning; and
- Create a work breakdown.



### Calendar Planning

All the activities on your project plan now need to be put on a calendar. This should



be put in a place where all staff can see it, and it should be checked regularly at meetings to see that tasks are happening according to plan.

March 2008						March 2008							April 2008									
Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun	M	T	W	T	F	S	S	M	T	W	T	F	S	S			
					1 March																	
					2																	
3		4		5	6																	
Set up meetings with schools			Visit potential schools																			
					7																	
					8																	
10		11		12	13																	
Do presentations at schools and clinics about project																						
		Sign agreement with school																				
					14																	
17		18		19	20																	
Have meeting with interested volunteers		Meeting Seed for Life about training		Meeting with chosen volunteers																		
					21																	
					22																	
					23																	
					24																	
Organise transport		Price equipment and supplies		Buy fencing																		
Set up training dates																						
Set up venue																						
					25																	
					26																	
					27																	
					28																	
					29																	
					30																	
					31																	
Fence Garden																						

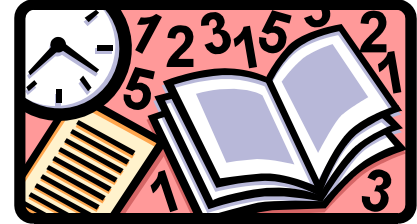
Using different colours for different activities and showing what activity you are focusing on for what week/ month will also help make things easy to see.

Remember to include items on your calendar like:

- Team Meetings
- Funding Deadlines



- Supervision times for staff/ volunteers



### Creating work plans

The next important step is to break down all the activities on your project plan into all the little steps that make them happen. You can use this to then draw up a monthly work breakdown. It is good to do this together with all staff and then to make sure each staff member makes their own one so that they know their responsibilities.

Just like when you did the project plan, you need to brainstorm all the jobs that need to be done, the dates by when they need to be done and the names of the people who will do them. Then you need to prioritise – which are the most important to do first, and in what order they should happen (scheduling).

- Step 1:** Write down all the tasks it takes to do an activity
- Step 2:** Make the most important ones, a special colour
- Step 3:** Put them in order – what needs to happen first
- Step 4:** Put names next to each – who will do what
- Step 5:** Write them into a work breakdown (see next page)





## Definition

### **Prioritising – what should I do first? What is the most important?**

This is about deciding which activities are the most important (or urgent) to do first, so that you can do them first.

### **Scheduling – when should I do what?**

When planning a project, it is important to remember that some activities can only happen when other activities have been completed before. As you do in the project plan, you need to put your activities in the order that they need to happen.



## Case study

### **Starting a vegetable garden at the school**

See the pages to follow.

**Case Study: Starting a vegetable garden at the school**

<b>Month: March</b>			
<b>ACTIVITY DESCRIPTION</b>	<b>By when</b>	<b>By who</b>	<b>Done</b>
<b>Identify and secure agreement for site of food garden</b>			
• Make a list of schools in area	3 March	Thami	
• Call all schools to see if interested – if yes, set date	4 & 5 March	Thami	
• Visit schools to check site	6 & 7 March	Thami, Sipho	
• Choose a school	10 March	All	
• Draw up agreement and get it signed	11 March	Thami	
• Sign agreement	12-13 March	Thami	
<b>Identify volunteers (beneficiaries) for garden</b>			
• Call clinics to tell about project	4 & 5 March	Sipho	
• Presentations at support groups	10 – 14 March	Sipho/ Omar	
• Letters to school principals	11 March	Thami	
• Meet with interested volunteers	17 & 18 March	Sipho/ Thami	



• Get volunteers to fill in form	At meeting	Omar	
• Choose 20 and have intro meeting	19 March	All staff	
<b>Buy equipment and garden supplies</b>			
• Price equipment and get quotes	26-27 March	Jackie	

Remember that it doesn't help to have a good work breakdown or calendar, if you don't stick to it!! Time management is an important skill of a good project manager. Time management is all about good planning and then checking on this plan regularly and sticking to it.

If you run a regular service, then instead of a work breakdown, it helps to draw up a roster that you put up in a central place, to help all concerned. Remember to include who is responsible for each item on the roster.



**Case Study Roster: Maintenance for gardening project (all tasks together with volunteers)**

	Monday	Tuesday	Wed	Thursday	Friday
Morning	Water plants (Thami)	Water Plants (Sipho)	Water plants (Thami)	Water Plants (Sipho)	Water plants (Thami)
	Weeding (Thami)			Weeding (Sipho)	Add Compost (Thami)
Afternoon		Do teaching and planting with school kids (Sipho)		Harvest veggies (Jackie)	Take veggies to school for sale (Omar)
	Fertilizer (Jackie)				
	Lock up (Omar)	Lock up (Omar)	Lock up (Omar)	Lock up (Omar)	Lock up (Omar)





## Definition

### Roster

A roster is a timetable of activities that happen on a regular basis.



## Group activity

In your group, list what things you can do (tools and processes you can use) to support this area of project management?

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## Human Resources Management

It is important to make sure all staff know what their tasks and responsibilities are from the beginning so that they know what is expected of them.

At the beginning of a project, identify what skills you have in your organisation and community. What can each person do? Then when you list all the tasks in the work breakdown, you can give jobs to those who have the skills. Always be aware of the skills and talents in your team, and remember that sharing tasks should be done in a way that will develop your team.

Setting up good supervision and a reporting plan will also make sure that the project is managed well. Have regular staff meetings so that people can report on their progress as well as discuss challenges and difficulties. Job descriptions, contracts, performance appraisals will also help with this, but this will not be covered in this guide, it needs a special human resources manual.

The role of the project manager, or any leader, is to make sure that all team members feel included, appreciated, developed and supported. The management of people and how you make sure that they are happy and satisfied in their work is really important and should not be forgotten. You need to focus not only on doing your project activities, but on the people as well.







## Quality Management

This is about making sure that what the project does is of a good standard.

At the beginning of the project, you need to set standards for your activities and put systems in place to check that you are offering good services – for example evaluation of courses (maybe forms or interviews) with your clients; meetings with stakeholders to review the project; mid-year project reviews with staff. Some of this you will have written in your project plan (in the column “**how will I know if I am successful?**”)



One way to monitor progress towards our objectives in an organisation is to make sure that every day all staff records their activities.

**Monitoring** is the name we give to the process of collecting information about the **day-to-day** activities of the organisation, in order to see whether it is making any progress towards its specific goals and to make changes where necessary.

**Monitoring is not the same as evaluation**, but the information gathered by monitoring can be an important contribution to evaluation.

For example: Each staff member could fill in a form/ report after each visit/activity and then hand them in to their manager with an explanation and discussion.

Then, once per month, all key staff should meet to:

1. Look back over the past month and report on their activities to check if these activities helped achieve their aims
2. Discuss the coming month and plan their activities with the current situation, resources and specific aims in mind.

An important part of quality management is monitoring your programme during implementation.

The information you collect (monitoring) is used to check that projects are running well, so that if not, changes can be made while there is still time in the project. It doesn't help to discover that something was not working at the end of the project when it is too late. This information is also used at the end of a project to do an evaluation of the project.





## **Risk Management – Avoiding threats and problems**

This is the ongoing checking and assessment of projects, staff, venues and activities to ensure that things are safe and that possible threats are noticed and fixed in time.

Remember that there are many reasons why projects fail. Even with all our planning, work and commitment, things sometimes do not work out as we planned. Things that you need to look out for or that can cause a project to fail are:

- Key staff or board members leave
- Staff or volunteers are overworked and become burnt out
- Staff do not get enough support
- The work load is too much
- The community doesn't cooperate because they feel the project is not theirs
- Conflict amongst stakeholders – often about roles and responsibilities
- Project plan and work breakdowns have not given enough time for tasks
- The budget was not well worked out





## Financial Management

This involves:

- Budgeting for the project – and getting approval for this before spending (from the person who has that role in your organisation – for example the board, manager, treasurer)
- Keeping a record of expenses (slips etc) through a bookkeeping system
- Keeping track of expenditure versus budget – are you spending what you said you would - on the things you said you would??
- Are you spending too much (overspending) or spending too little (underspending)?
- Financial reporting on the project (internally and to funders)
- Sourcing well-priced items for your project.



All the tools for this need to be learnt – in a bookkeeping or financial management course. Some financial understanding is necessary to manage a project.

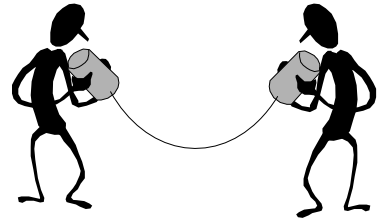




## Communication

Communication is an important part of any project but particularly important during the implementation part of the project life cycle as it can have an effect on your success or failure.

At the beginning of the project, you need to list the stakeholders who need to be kept informed about the project - both within and outside of the project i.e. those who need regular information on the project e.g. Project



funder, managers, Department of Social Development, if you are a registered NPO, etc.

You need to then identify what kind of communication each of them needs. Then you decide when this needs to happen, who should be responsible and then put it into your calendar.

*For example – a funder needs to be sent reports regularly – often once a quarter (your funding agreement will describe these communication requirements).*



## More on the role of a Project Manager/ Coordinator

It is often argued that as the project manager is the **single point of responsibility**, and that s/he is responsible for everything that happens on the project. This responsibility can be supported by the following documents:

- Strategic plan
- Project plan
- Project budget
- Calendars and rosters
- Funding agreements or Contracts
- Policies
- Progress reports
- Minutes of meetings
- Job descriptions
- Work breakdowns
- Performance evaluations
- Specific programme guidelines (e.g. Home-based care)
- Laws and regulations

All these are the responsibility of the project manager. Once the project is running well, the project manager's job is to keep team spirits high and ensure that the project reaches the objectives in time and within budget.





## Group activity

Tick which of the above you use and write below any others that you find useful in your daily work:

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## Self-test

You should be able to answer the following questions:

- Do I know what a work breakdown is?
- Can I use a calendar to plan my activities?
- What is monitoring and do I know how to do it?

Please ask your facilitator if you are unsure of any of the above.

## PROJECT COMPLETION AND /CLOSURE

This is the last part of the project life cycle where the project activities are coming to an end. Often this part can be forgotten, but it is important to make time to think about the project so that learnings can be taken forward to the next project and increase the chance of success.

The activities in this phase are staff monitoring and evaluation, review and correction, reporting and handing over, etc.

- **Revision and correction:** this is the stage where any last minute - problems on the project are sorted out.
- **Project monitoring and evaluation:** this step involves taking all the progress reports from the other stages and comparing these to the time frames and budgets and then to see what changes and learnings there are. To be able to do this you need to keep good, accurate reports and up-to-date bookkeeping during the implementation stage. This depends on the information provided being accurate and well documented. This means good reporting and bookkeeping during the implementation phase.
- **Staff reflection and learning:** This is part of evaluation and can be done as a meeting of all staff or team (including the stakeholders and clients) to reflect on the project and assess its success and failures. **We need to reflect:**
  - To see what has been achieved and check progress



- To improve management and monitoring
  - To identify strengths and weaknesses that will help the programme
  - To judge whether the cost was reasonable for what was achieved
  - To collect information that will help us run our activities better
  - To share experiences so that we can avoid repeating mistakes
  - To improve effectiveness
- **Reporting and Handing over:** no project is complete unless a final report is drawn up, filed and submitted. This report should provide overall project information - time, cost, quality, resources, etc. as appearing in the project plan and indicating the extent to which all the activities identified were met within the projected time, cost and quality measures and /OR whether there were missed targets.

Where there were missed targets, the report should provide the explanation relating to why and how the missed targets were then attended to.

The Stakeholders (including the beneficiaries) should be included in this report back.



## More about Evaluation

The word “evaluation” simply means to assess the value of something.

**Evaluation** is an assessment at different stages in the project. At the beginning, middle, end or in regular periods and after the project closed.

Evaluation asks questions such as:

1. Is the project likely to achieve its objectives with its existing activities and approach?
2. Has the project made a lasting improvement in the issues it was trying to address? Has it been valuable?
3. What are the strengths and successes of the project?
4. What are the weaknesses and mistakes?
5. Was the project being properly implemented?
6. Did the project benefit the clients (target audience)?

Sometimes organisations don't want to do evaluation, because they feel that it will show their mistakes and result in criticism and make difficulties with funders.

Don't be afraid of discovering mistakes.

There is no work without mistakes, especially work with people! An organisation that understands that mistakes are part of any project and so evaluates, will be doing better, more effective work in the future than the one that doesn't.

Donors know this and are likely to want (and have the right) to know how the money they have given was used and how well it was used. This is important to them, and they are more likely to give a second grant to a CBO that has been honest about their problems, and tried to fix them openly, than they are to one which doesn't do this and has no history of evaluation.

Evaluation helps us to:

- Learn from our past work
- Show success and failures
- Judge whether aims have been achieved
- Change and improve our present work
- Report back to donors on the returns on their financial investment
- Correct and develop our plans for our future work

For some projects, it is necessary to have a project review (after implementation) by an independent party in order to see if the project is achieving its aims and objectives so that all lessons learnt get kept for future projects.







## Individual activity

What can you do to evaluate the successes and failures of your project?

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## Self-test

You should be able to answer the following questions:

- Do I know what evaluation is?
- What do I need to do at the end of a project?

Please ask your facilitator if you are unsure of any of the above.

## Project checklist

Project Checklist		
Project:	_____	
Start of Project:	_____	
End of Project:	_____	
Check how you are doing in planning and managing your project	Yes/No	
Conceptualisation and Planning	Have we done a needs assessment to understand the needs in the community? (Did we write our findings down?)	
	Have we consulted with the stakeholders about this project?	
	How did we decide on our project? Did we consult? Was there consensus?	
	Do we have a clear idea of the project scope – size, nature, focus of the project?	
	Do we have clear Aims and Objectives? Are they well understood by the beneficiaries, staff and stakeholders?	
	Have we made a detailed plan for our project – detailing the timeframes, who will be responsible, what resources are needed?	
	Did we draw up a budget?	
	Do we have a plan for how we will check our success?	
	Have we thought about possible challenges or problems we might have?	

Check how you are doing in planning and managing your project		Yes/No
Implementation	Have we written up all our main activities into a calendar?	
	Have we broken down all our activities into the specific tasks we need to do to achieve them?	
	Does everyone know what their role and responsibility is?	
	Do we have regular reporting guidelines?	
	Do we have regular meetings to check on the project progress and plan for the coming activities?	
	Is there a good, clear communication system in place?	
	Are there good bookkeeping systems and financial reporting in place?	
Closure	Are we checking that our aims and objectives are being achieved?	
	Have we spent time (staff, beneficiaries and stakeholders) reflecting on the success of the project and learning for the future?	
	Have we written up a final report? (narrative and financial?)	
	Have we done evaluation of the project?	
	Have we reported to the stakeholders?	



### Worksheet 3



### Individual activity

Please think of a project at your organisation. Think of the different steps that went into the project and answer the following questions. Do this together with two other people from your organisation so they can also learn (please get them to sign that they participated).

Who is the project for?

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What need/ problem does the project address?

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What is the project aim? How does this link with your vision and/ or mission?

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How did you decide on the project?

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Who are the stakeholders?

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What resources are available within the organization – time, people, other resources – to deliver this project?

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What are the objectives of your project?

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**Please complete a project plan for one of your objectives – showing your activities, who is responsible and what it costs (see next page)**



**Project plan (complete a separate table for each project objective)**

<b>Aim/s:</b>				
<b>Objective:</b>				
<b>Activities</b>	<b>Time frames</b>	<b>Person responsible</b>	<b>Resources needed</b>	<b>Outputs and indicators</b>
What are the things that we need to do to achieve the objective?	When will it be finished?	Who will be responsible for this?	What do I need and how much will it cost?	How will I know I'm successful? What proof will I keep?



How do you report on the progress in the project? Who does that?

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How do you monitor and check the success of your project?

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What do you need to do at the end of your project?

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**Please do a work breakdown or calendar for a month's work in your organisation. Do one for yourself and one for a colleague. Please attach.**

I, \_\_\_\_\_ (your name), from  
\_\_\_\_\_ (organisation) did

**this worksheet together with 2 colleagues from my organisation/ community.**

**They are:** \_\_\_\_\_  
\_\_\_\_\_

**Date:** \_\_\_\_\_

**Signatures:** \_\_\_\_\_



## Portfolio of Evidence: An Overview

If you would like to be assessed for competence in this standard, you will probably be asked to provide a portfolio of evidence (a collection of proof) that you are able to Plan and Manage distinct community development projects.

It is therefore important that you write down and keep record of all the tools that you use when planning and managing a project. These are some of the things that you should try and keep in your organisation so that you can show your knowledge.

- Calendar with activities, staff meetings and reporting deadlines
- Needs Assessment (written down)
- Project Plan (including project aims, objectives and project scope)
- Work Breakdowns (when necessary)
- Minutes of staff planning meetings
- Minutes of staff progress meetings
- Minutes of project reflection meeting at end of project
- Minutes of meetings with stakeholders

If you find any of these difficult to do, please contact your mentor for assistance.

**Thank you for your participation in this course!**





