Grassroots Collective

ALL MODULES | **HANDBOOK 1**

Tools for Effective Project Planning in Community Development.

www.thegrassrootscollective.org

Grassroots Collective is an international movement committed to strengthening local community non-profits.

We believe that local community organisations are best positioned to implement truly sustainable development solutions. It is our mission to strengthen your work, foster local capacity and help you deliver durable development solutions to local communities.

This handbook has been created as a step-by-step guide to assist non-profits in planning local community development projects. It has been produced by a team of development practitioners and teaching professionals. Whilst the tools, frameworks and guidelines within this handbook have been designed with transferability in mind, it is essential that you contextualise their use and apply them within the legal limitations of your country.

This handbook is a living document. Concepts of best practice are constantly being reviewed and refined, as is the contents of this handbook. We cannot guarantee the completeness, accuracy or suitability of this information for any particular purpose. In addition, the information found here should not be treated as a stand-alone solution to all project planning challenges. This information is simply a guide; the means by which it is applied is under your direction.

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A 'Kantha Shakthi' team member runs a community workshop in Sri Lanka.

HANDBOOK 1

MODULE 1

Tools for Effective Project Planning in Community Development

Download Resources

As you complete this handbook, use **'Resource 1 - A Checklist for Effective Project Planning'** on p86. Use this resource as a guide when you are planning and designing your own community development project to ensure you have completed every step.

Introduction to Project Planning for Community development

Guaranteeing that your work is both impactful and sustainable requires investment in the planning and design process. Although the development of programs can vary in time and scope and is highly dependent upon the complexity of the problem and context, there are a number of underlying principles that hold true for all project designs.

We cannot emphasise enough the importance of being methodical in your approach to project planning. Whilst it may be frustrating, and you feel like you want to put your great idea into practice straight away, it is essential to first take a step back and plan methodically. Follow the steps outlined in this course one after the other to give your great idea the best chance of turning into a successful project.

Who should be involved in the planning process?

When you start planning, the best approach is to work through your project planning and design as a team, including as many stakeholders as possible. This includes beneficiaries. Be prepared to spend some time working together as a group, so that you can brainstorm ideas in a cooperative manner. Not only will the group present an array of ideas, but the diversity of different perspectives will lead to informative discussions and a broader perspective.

The advantages of thorough and methodical planning

Properly planned projects not only address the needs of beneficiaries, but do so in an efficient manner, maximizing resources to leverage greater impact. A properly executed design process will help you work through the feasibility of not just your plans, but also your goals. It can help you identify risks, as well as opportunities and by correctly identifying key stakeholders within the community, it will lead to a more effective, appropriate and lasting project.

Handbook overview

This handbook will provide an overview of some of the most important tools and resources to facilitate discussion amongst your planning team. Throughout the handbook, we will introduce key planning advice, as well as specific frameworks and ready-to-use models in the context of participatory design that your organisation may want to use to increase the impact of its work.

Most organisations who use these tools adapt them to meet their needs. Use this handbook with your own goals and processes in mind so that you can begin thinking about shaping the tools or mixing-and-matching them to meet your specific needs.

Module		Goal/Aim	Tool	Material/ Downloads
1	Introduction to Project Planning for Community Development	Explore why thorough project planning is important for effective development		• Checklist for Project Design
2	Using a **Situational Analysis** to explore the context of your development project	Identify the context, broad project goals and important relationships	Situational Analysis	• 'Analysing Your Context' Checklist • SWOT Analysis • 5C Analysis • SCOPE Analysis
3	Setting realistic project goals using a **Problem and Objective Tree**	Understand the problem, identify objectives and create clear goals	Problem Tree Objective Tree Alternative Analysis	• Problem Tree Template • Objective Tree Template • Alternative Analysis Template
4	Using a **Stakeholder Analysis** to identify who is involved in your development project	Find out who will be impacted by your project, how they are involved and how they might influence the project's success	Stakeholder Analysis	• Categorising Stakeholders Framework • Stakeholder Interest/ Influence Analysis • Stakeholder Analysis
5	**Choosing the best intervention** for your development project	Compare different intervention strategies relating to feasibility criteria and decide upon a specific initiative	Feasibility Study	• 'Identifying possible solutions' Checklist • Solution Analysis Framework
6	Using the **Theory of Change** to understand how your development project will practically meet its goal	Identify the specific activities and outputs that will help you achieve long-term change	Theory of Change	• Theory of Change Framework
7	Incorporating **Monitoring and Evaluation** when designing your development project	Establish a group of activities and indicators to measure your project's ongoing success	Monitoring and Evaluation Analysis Plan	• Monitoring and Evaluation Analysis Plan
8	Using a **LogFrame** to synthesise project design in Community Development	Combine the elements of your project design into a single framework	Logical Framework	• LogFrame Template
9	Analysing how **Gender Relationships** in the community will interact with your development project	Understand the gender context, analyse gender dynamics and explore how these will affect your project	Gender Analysis	• Gender Analysis Matrix

Helpful Hint

If you are receiving support from an outside funder or international donor, be aware that despite (sometimes) good intentions, donors may seek to impact your project design by favouring certain types of projects. They may seek to incorporate their own organisational priorities into your work, attempting to change the objectives or activities of your project to make it more relevant to their donors or mission.

This may impact the effectiveness of your project and how well you can support local beneficiaries. It is up to you, the grassroots implementers, to push back with the reality of how the design effects local communities. Try to steer clear of top-down influences by using your local knowledge to develop plans that maximise benefits to the community with value for time, money and resources. For more information on this topic, check out our 'Accountability in Community Development' article that can be found in the Grassroots Hub section of our website.

Before you start, a quick word on sustainability

A successful project is one that not only achieves its stated goals, but also continues to function towards these goals once the original impetus and source of support withdraws.

Helpful Hint

For a project to start, people have to believe in a tangible and immediate benefit from their participation. For it to continue, they have to see that their work is making an impact.

Thinking about sustainability when you are planning and designing your work ensures for greater success. The communities you work with will be left with programs that facilitate the change they themselves wanted. They will take ownership of the project and will keep improving and adjusting it to their needs long after your organisation is gone.

Sustainability is a term that can mean a variety of things:

- environmental considerations
- education and training
- continued operational support
- long-term financial viability
- facilitating hand-over through adequate involvement of the community
- The ability for the local community to repair or maintain any required equipment

Ultimately, the hope should always be self-sufficiency for the communities you work with, where beneficiaries are trained to continue programs or facilitate the same intervention without your continued involvement.

Helpful Hint

If you are promoting a practice that will not survive once you take away the incentive or your support, then it is not a sustainable project.

Finishing up

Now that you have a basic understanding of why thorough project planning is important, it's time to begin our planning process. The first step is to examine your project's context through a situational analysis which we will explore in **Module 2**.

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A 'Mi Parque' beneficiary takes part in a community workshop in Chile.

HANDBOOK 1

MODULE 2

Tools for Effective Project Planning in Community Development

Situational Analysis

In this module we explore the first step of the project planning process, a Situational Analysis. This process serves to identify the context of your work, the broad project goals and the important relationships you need to be aware of. In order to be strategic, efficient and effective, it is essential to undertake a thorough and structured process of analysis.

Taking the time to understand your context will help strengthen every future step of your project planning and design. A thorough situational analysis also ensures that your project team shares a common understanding of the over-arching goals of your project, essential to staying on track.

Download Resources

As you complete this module, refer to:

- **'Resource 2 - Checklist for Situational Analysis',** p87
- **'Resource 3 - SWOT Analysis',** p97
- **'Resource 4 - 5C Analysis',** p98
- **'Resource 5 - Scope Analysis',** p99

Use these resources as templates when you are planning your own project.

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What is a Situational Analysis?

A Situational Analysis is a 5-step process that progressively focusses your understanding of the community in relation to the local problem you are choosing to address. This allows you to assess the broad societal context of your community, and then apply this to your organisation's project.

STEP 1 Understand the broad context

STEP 2 Identify local challenges

STEP 3 Assess your capacity

STEP 4 Choose a broad goal

STEP 5 Reassess the local context

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5

Understanding the general context of your community

Understanding the context means understanding the current circumstances within which your organisation is working, or is seeking to work in. Whilst you might already have an idea of the type of project you want to run or the type of problem you want to solve, it's best to start with a general analysis of your context. Consider the questions on the following pages as a guide – you may need to modify them for your specific community.

Helpful Hint

Whilst being as accurate as possible when answering these questions is helpful, at this stage, estimations will often suffice.

Population Profile	How many people are in the community?	
	What is the age distribution of these people?	0-5yrs = ... % 6-15yrs = ... % 15-60yrs = ... % Over 60yrs = ... %
	What is the (estimated) percentage of men and women?	Males = ... % Females = ... %
	What ethnic groups are represented in the community? What is their distribution (as an estimated percentage)? Do people in the community tend to seperate based upon ethnicity, or do they assimilate well?	X = ... % Y = ... % Z = ... %
	What languages do people in your community speak? What is their distribution (as an estimated percentage)? Generally, how well can people from different language groups communicate together? Is there a predominant shared language?	X =...................................... % Y = ... % Z = ... %

Education Profile	What are the literacy rates of your community?	
	What percentage of community members graduate primary school?	= .... %
	What percentage of community members graduate secondary school?	= .... %
	What percentage of community members graduate university?	= .... %
	What percentage of community members have skilled employment?	= .... %

Economic Profile	What percentage of the population have access to housing?	= .... %
	What percentage of the population have stable access to food?	= .... %
	What kind of jobs do people have in your community? For example: Manufacturing, agriculture, hospitality etc.	
	What are the key areas of economic growth in your community?	

Environmental Profile	What type of environment is your community located in? For example: Tropical, dry, jungle, city etc.
	How big is the geographical area covered by your community?
	How easy is it to access different areas of your community?
	How far away is the closest hospital/secondary school/major metropolitan area? How easy are they to travel to?

Political Profile	What are the current major political issues?
	What are the political priorities of the current government?
	How is the government viewed within the community?
	How well do local government representatives function and work together with national government, law enforcement and other public departments?

Cultural Profile	What are the major cultural values of the community?
	Are there any major cultural conflicts between different sectors of the community?
	Are there distinct gender roles within your community? Do cultural norms marginalise women from certain jobs and activities?

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5

Identifying the challenges within the community

Now that you have a broad understanding of what your community looks like, it's time to identify the major challenges that community members are facing. At this stage, it is helpful to consult the local community either through workshops, surveys or interviews to ensure that you have accounted for problems from their perspective (see our **Participatory Development Course** for guides about how to run these workshops). Throughout this process, it is also really important that you don't engage tunnel vision – don't only look through the lens of your organisation when identifying problems. For example, if you are a healthcare organisation, don't simply look at healthcare problems. Try to think laterally and holistically.

Try to be as broad as possible when identifying challenges. At this stage, your aim is to identify the over-arching problems your community faces, rather than detailed and specific challenges.

When identifying the major challenges within your community, asking the following questions is helpful:

- How severe is it?
- What are some of the broad causes?
- What are the broad groups of people who are affected by this problem?

eg: Example: Broad Challenges experienced by many communities

- Poor quality of education for local secondary students
- Domestic violence amongst young married women
- Lack of economic opportunity for unskilled rural workers

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5

Assessing your organisations capacity

Once you've identified the major challenges experienced within the community, it's time to assess the capacity of your organisation in order to identify the best opportunity for your organisation to help. This will assist you in maximising the efficacy of your organisation's work. This process can be challenging, but it's important to get this critical reflection out of the way right at the start of your project planning process. There is no point planning an amazing project, only to realise that you don't have the skills, knowledge or resources to execute it.

Staff: Qualifications and experiences	How many people work for your organisation?
	What is the technical experience and qualification of each staff member?
	Has your organisation undertaken any previous development projects? • What type of projects were these? • What types of specific interventions did you provide?

Relationships: Organisations, businesses and government bodies	Does your organisation have existing relationships with the community from previous projects? Which broad areas of the community do you have existing relationships with? For example: children, women, farmers, manufacturers.
	What external businesses, organisations or government bodies does your organisation have existing relationships with? • Could you draw upon these relationships for certain types of projects?

Obstacles and insufficiencies	What are the major obstacles or insufficiencies of your organisation and your staff members?

The aim of this process is to identify the strengths (and weaknesses) of your organisation in order to choose the broad community challenge that your organisation is best suited to tackle. Using a SWOT-Analysis can be particularly helpful when completing this step (see page 15 for a detailed explanation of this tool).

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5

Choosing a broad project goal

Now that you have identified the major challenges in the community and the capacities of your organisation, it's time to choose the broad problem your organisation is bested suited to address. Choose the broad project goal that allows you to maximise the strengths of your organisation and minimise its weaknesses. The key to choosing a project goal at this stage of your planning process is being broad, really broad. Some examples might include:

Examples: Broad Project Goals

- Improving education levels amongst youth within the community
- Improving the economic opportunities for women within the community
- Improving access to fresh water in the community
- Improving access to housing for homeless people in your community
- Decreasing maternal mortality in the community
- Decreasing rates of domestic violence within your community

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5

Reassessing the context relevant to your problem

Finally, now that you have identified the broad goal of your project, it's time to re-assess the context (or the situation) through the lens of this specific goal and problem. This final step is an opportunity for you to be more specific about the type of information you need to best understand your problem. We will use an example of a Domestic Violence project on the following page to demonstrate how to reassess the context of your project relevant to your specific goal and problem.

Download Resources

You can find a template for this tool in **'Resource 2 - Checklist for Situational Analysis'** on p87. Use this resource as a guide when planning your own community development project.

Example: Reassessing Domestic Violence in the Community

In this example, you can see the specific questions that might help a community nonprofit reassess the local context relevant to their goal of preventing domestic violence. It is important that you create your own questions that are relevant to the broad project goal that your organisation has chosen in step 4. The examples here are only relevant to a domestic violence project.

When completing this step, try to draw upon any existing information from other NGOs or online government data banks to gain a more accurate understanding of your context. Now is the time to be more specific about the data you collect and the analysis you complete.

REASSESSING CONTEXT **Domestic Violence Within the Community**	What is the estimated incidence of domestic violence in the community? • Is there any national, state or regional data available from exiting research?
	Who are the people suffering from domestic violence in the community? • Gender? • Age? • Ethnicity? • Education status?
	Who are the perpetrators of domestic violence in the community? • Gender? • Age? • Relationship with victim? • Status?
	Where does domestic violence normally occur? • Within the family home, in public or in other geographical places?
	How do people view domestic violence in the community? • Do people recognise it as a problem? • What are the cultural norms surrounding the topic of domestic violence? • What are the prevailing norms about masculinity? Specifically, within the family?
	Are there any services currently offered to support people suffering domestic violence? • These could be government initiatives or those provided by other NGOs
	Are there any laws preventing domestic violence in the community? • Are these laws enforced? • Whose responsibility is it to enforce these laws?
	Are there any current political movements surrounding domestic violence? • Are there groups currently lobbying for change? • Is there a current political debate surrounding domestic violence?
	What are the major obstacles or challenges related to decreasing incidences of domestic violence in the community?

Tools to assist you when undertaking a Situational Analysis

The questions you need to ask and the information you need to gather when completing a Situational Analysis are different for every context, problem and organisation. Unfortunately, there is no set framework to follow. One of the biggest problems organisations have when completing a Situational Analysis is coming up with the right questions to ask to help complete a thorough analysis.

To help with this, you can use one of the following tools to ensure that your analysis is thorough and complete.

SWOT Analysis

5C Analysis

SCOPE Analysis

These tools can be used interchangeably throughout every stage of your situational analysis. All three tools cover similar types of questions, but in different ways. As such, you don't necessarily need to use all three. It is best to choose one that you feel most comfortable with and use that one to assist your analysis. You can then take the information you generate by using these tools and input it into your broader Situational Analysis that we explored above.

Helpful Hint

A helpful exercise can be to get different members of your organisation to complete the same tool individually and then compare results as a group. This can raise some interesting questions and help ensure your Situational Analysis is thorough and takes different viewpoints into account.

SWOT Analysis

Strengths, Weaknesses, Opportunities, Threats

Useful for:

Identifying the best type of project for your organisation by analysing your internal capacities (strengths and weaknesses) and your external environment (opportunities and threats). This tool is generally most useful for step-3 of your situational analysis.

How it works:

- Strengths - Internal aspects of your organisation that you believe are your advantages.
- Weaknesses - Internal aspects of your organisation that you believe require development.
- Opportunities - Factors external to your organisation that may contribute to your project's success or amplify your organisation's strengths.
- Threats - actors external to your organisation that may cause problems or present risks to your project.

The SWOT analysis is a two-step process:

1. Identify your organisation's internal strengths and weaknesses: Think about the people, experience, qualifications and resources your organisation has and how your organisation can most (or least) efficiently use them to support your community. Place these on the left-hand side of your analysis.

2. Identify the external opportunities and threats to the work of your organisation: Think about the relationships you have with other people or groups within the community, the political environment and factors you have little or no control over, like the natural environment, broader political narrative and robust cultural norms.

Results:

After completing your SWOT analysis, you should have a clearer understanding of how your organisation can best use the resources it has to maximise the benefits to local community-members. By reflecting upon your organisations capacity within your specific context, you can choose projects that have the best chance of success.

SWOT Analysis

eg: Example: SWOT Analysis exploring the capacity of a Domestic Violence prevention organisation in Uruguay to run a series of social support workshops for women in a rural community.

DOMESTC VIOLENCE ORG

STRENGTHS

- Our organisation has experience supporting victims of domestic violence
- We have already secured a long-term donor

OPPORTUNITIES

- Government grants currently available for Domestic Violence programs offering social support
- We have a strong relationship with another NGO that supports women in the community

WEAKNESSES

- We only have 3 staff members available for this project
- We have never worked in this community before
- We lack a formal guide for conducting workshops with local women

THREATS

- Males in this community may be suspicious of our intentions given this will be our first project in this region
- Existing gendered power dynamics in this community may limit our access to local women

Download Resources

You can find a template for this tool in **'Resource 3 - SWOT Analysis'** on p97. Use this resource as a guide when planning your own community development project.

SWOT Analysis

Example: More uses for the SWOT Analysis

Whilst the SWOT Analysis is generally best used during step-3 of the Situational Analysis process when assessing your organisation's capacity, it can also be used in step-5 to assess your chosen problem within your community's context. Instead of putting your organisation in the middle, place 'the community' in the middle. This way, you can identify the communities strengths (things that your community already does well relating to the problem), its weaknesses (areas the community does poorly related to the problem), its opportunities (broader external opportunities like new laws that might help the community overcome the problem) and threats (broader external factors that could or are negatively impacting upon the problem like cultural assumptions and economic barriers). This can process be particularly helpful in identifying specific 'opportunities' for your organisation to best support your communities 'weaknesses'.

STRENGTHS

- Community sentiment appears to view domestic violence as a problem
- Women are forming groups to help support women suffering domestic violence

OPPORTUNITIES

- Laws have recently been passed criminalizing domestic violence
- Popular media are publicising these new laws

THE COMMUNITY

WEAKNESSES

- Many men indicate violence within the home is not a problem
- Cultural stereotypes of masculinity limit wives' decision-making autonomy

THREATS

- Male Police have demonstrated a disinclination to enforce new laws

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5C Analysis

Company, Competitors, Customers, Collaborators, Climate

Useful for:

Undertaking a more detailed analysis of the internal capacities and the external factors in the project environment. This tool is most useful when assessing the context and the problem in steps 2, 4 and 5, rather than your organisation specifically.

How it works:

5C identifies specific opportunities and challenges that a project might face. It is a widely used business tool that has been adapted for the nonprofit sector.

- Company— This involves identifying the organisation's vision, strategies, objectives, capabilities, technology, and culture, as well as understanding the existing and potential problems and opportunities within the organisation.
- Customers (Beneficiaries) — This involves defining the target beneficiaries; their behaviour, their number/size, what support they need, how they consume support and their preferred methods of accepting support.
- Competitors— This involves a critical analysis of the environment in which the organisation operates; knowing the strengths, weaknesses, positioning, market share, and upcoming initiatives of other NGO and government programs related to your cause.
- Collaborators— This involves identifying the agencies, suppliers, governments, and business partners that can partner with your NGO in achieving its mission. Make sure you identify their capabilities, performances, and issues to maximise the benefits of collaboration and better foresee potential problems.
- Climate— This involves the evaluation of the macro-environmental factors affecting the organisation. A PESTEL-Analysis can be used to analyse political, economic, social/cultural, technological, environmental, and legal scenarios. A detailed explanation of this tool can be found in **Module 4** on page 32.

Results:

A deepened understanding of the broader community context and how this interacts with the problem that your organization seeks to solve.

Download Resources

You can find a template for this tool in **'Resource 4 - 5C Analysis'** on p98. Use this resource as a guide when planning your own community development project.

SCOPE Analysis

Situation, Core Competencies, Obstacles, Prospects, Expectation

Useful for:

Creating a more detailed strategy for the future of your organisation. It is often used as an alternative to the SWOT-Analysis to permit a more in-depth analysis. The SCOPE Analysis works best in Step-5 when applied to a specific problem, rather than broader organisational and contextual factors. It helps take your problem-solving a step further, identifying the prospects of success and expectations of outcomes.

How it works:

SCOPE focuses on the specific opportunities and challenges of a given project from a broader internal and external perspective. It's important to be more specific than you might have been for the other tools above.

- Situation – This is essentially a summary of step 5 that briefly identifies key elements of the problem within the context of your community.
- Core Competencies – These are the key capacities that your organisation does best. Don't be shy. These should be unique to your organisation, not generalised to the problem. Try to be as specific as possible. This is about identifying the BEST ways that your organisation can help your community.
- Obstacles – These can be both internal and external to your organisation and should reflect the key challenges that your organisation needs to overcome in order to help solve the problem.
- Prospects – These are the 'opportunities' for your organisation to improve your impact by taking advantage of your 'Core Competencies' within the 'Situation'.
- Expectations – Here is a chance to engage your inner fortune teller. You need to realistically anticipate what will happen in your community over your project cycle that might have an impact on your project. Will there be an election? Is it rainy season? How would this impact upon your project? Think of both positive and negative impacts.

Results:

SCOPE helps to guide effective use of internal resources and focus your competencies upon solving a problem within the community.

Download Resources

You can find a template for this tool in **'Resource 5 - SCOPE Analysis'** on p99. Use this resource as a guide when planning your own community development project.

Finishing up

An in-depth analysis of the internal and external factors that might influence the progress and success of your project will aid the planning process in a multitude of ways. It will ultimately make it easier to identify priorities, adapt planning to the context, and provide adequate resources.

Use these tools intermittently throughout your Situational Analysis to ensure it is as thorough as possible. Remember to work as a team, consult with the community and be as creative as possible. After completing your Situational Analysis, you're ready to move on to setting realistic goals using the Problem and Objective Tree tools in **Module 3.**

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HANDBOOK 1

MODULE 3

Tools for Effective Project Planning in Community Development

Using a Problem and Objective Tree to Set Realistic Goals

This module aims to help you understand how setting realistic goals can improve your planning process. In development work, we often want to solve everything at once, but in practice there are often constraints upon time and resources that prevent us from achieving all that we desire. Using a Problem Tree that is then transformed into specific objectives enables you to set goals that are realistically achievable. Planning according to these specific and realistic goals will make your project more effective and cost-efficient, allowing you to do more with less.

Download Resources

As you complete this module, refer to:

- **'Resource 6 - Problem Tree Analysis',** p100
- **'Resource 7 - Objective Tree Analysis',** p101
- **'Resource 8 - Alternative Analysis',** p102

Use these resources as templates when you are planning your own project.

The importance of setting realistic goals

If you want to be successful, your goals must be within reach of what is possible. These achievable goals though, may still be part of a larger goal. Let's use the example of wanting to end hunger. Globally, your impact is going to be limited by a multitude of factors, like reach and access to necessary resources. Implementation is likely to be realistic only at a smaller scale. It does not mean that you should not strive to end hunger. What you should do is find ways in which your team can rectify hunger, poverty or food-shortage issues where you have reach. Once you've come up with an efficient and impactful design on a local level, you may be able to scale it up yourself and deploy it to other communities – or maybe it is an approach that other organisations can replicate and grow on their own. Both of these serve the ultimate goal and will bring several communities much-needed support.

In order to set your goals realistically and phrase your objectives specifically, it is essential to know what you are trying to do. For this, you have to know your problem, and the context you're operating in. Take a look at our 5-step situational analysis in **Module 2** to ensure you have an in-depth understanding of your context before you begin setting objectives.

Tools for setting goals and objectives

To get started in setting appropriate goals for your activities, there are a couple of different techniques that you may want to utilise. Ultimately, you want to set goals that are not only feasible, but also effective. Understanding; what resources you have, how projects have been conducted in the past and what you aim to achieve is a solid base for your development work. Here are some tools that are successfully used by project managers in business, as well as, development to help properly plan a project.

Helpful Hint

Make sure you use these tools in sequential order to make your goal setting is easy and thorough.

Key Goal Setting Tools

Problem Tree

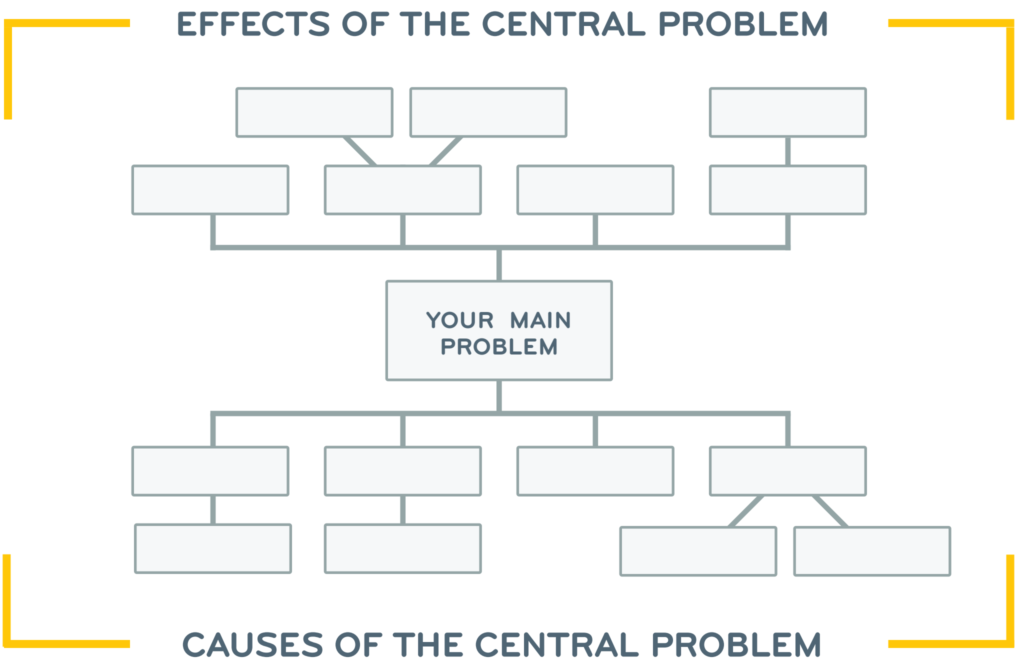
Objective Tree

Alternative Analysis

Defining
Clear Goals

Problem Tree Analysis

The purpose of the Problem Tree is to provide a broad overview of the problem, as well as, identify specific causes and resulting effects. The use of negative language whilst using this tool is helpful in identifying specific problems.



Step 1 Identify the main problem

- You will have identified the broad problem your organisation is seeking to address during your situational analysis in **Module 2**. Now is the time to start being a little bit more specific about your problem.
- The main problem will be placed at the centre of your problem tree.
- As we discussed in **Module 2**, deciding on the problem is best done in a group setting where community members and non-profit staff discuss core issues together.
- When trying to make your problem more specific, It can be useful to write suggested problems on a large piece of paper or blackboard so that everybody can see the options, identify how they interact and decide upon the most important problem to them as a group.
- Remember! It is important to identify a "problem"! Make sure that your problem is an existing negative state, not an absence of a solution. For example; "Crops are infested with pests" is a problem, "No pesticides are available" is not.

Download Resources

You can find a template for this tool in **'Resource 6 - Problem Tree Analysis'** on p100. Use this resource as a guide when planning your own community development project.

Step 2 Identify the problem 'causes'

- Find the specific causes that are contributing to this problem.
- The specific causes contributing to the central problem are placed below the main problem, forming the 'roots' of your tree.
- Often, many of the problems your team identified in step 1 are contributing causes to your main problem and can be added at the bottom of the tree.
- Remember that there are often multiple layers to contributing causes. Try to dig deep. The more detail you go into at this stage, the easier it will be to identify objectives and solutions.
- It is useful to use post-it notes if available so that you can easily re-arrange your tree. This is particularly useful when grouping related causes together.

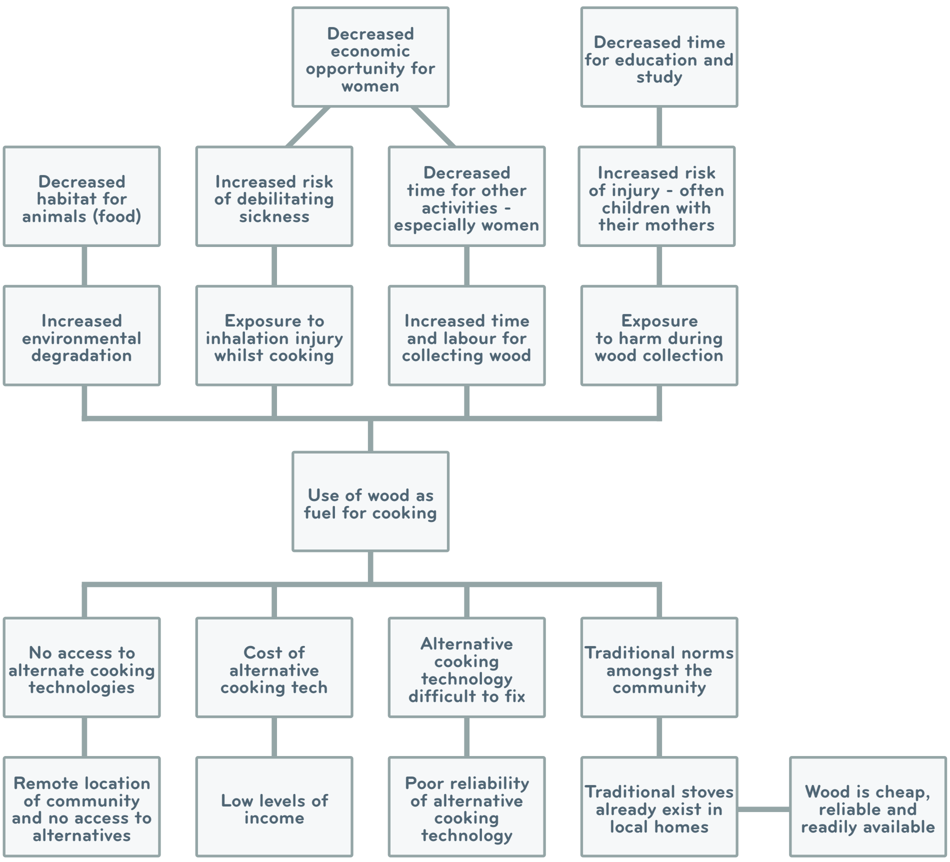
Step 3 Identify the problem 'effects'

- The final element of your problem tree are the effects resulting from your central problem
- These effects are placed above the problem and form the 'branches' of your tree
- Remember to explore multiple layers of each effect and be very specific

The problem tree is finished when all stakeholders are satisfied that all of the factors related to the main problem have been identified and placed on the tree.

eg:

Example: Problem Tree exploring the use of wooden fuel for cooking in India



Objective Tree Analysis

The purpose of the objective tree is to identify specific objectives that will overcome each element of the problem tree. Objective trees are important in guiding your project design and measuring your success. When writing the statements on your problem tree, you used negative language, simply changing these to positive statements will help shape your objectives. For instance, "lack of resources," will become "increased resources."

- To transform your problem tree into an objective tree, simply rephrase each element into a positive solution statement.
- The more specific you can be, the more useful your tree will be.
- It's okay to add new objectives that come to mind. If you do so, consider going back and adding the associated problem to your problem tree, as well.

eg:

Example: Objective Tree exploring the use of wooden fuel for cooking in India

Download Resources

You can find a template for this tool in **'Resource 7 - Objective Tree Analysis'** on p101. Use this resource as a guide when planning your own community development project.

Alternative Analysis

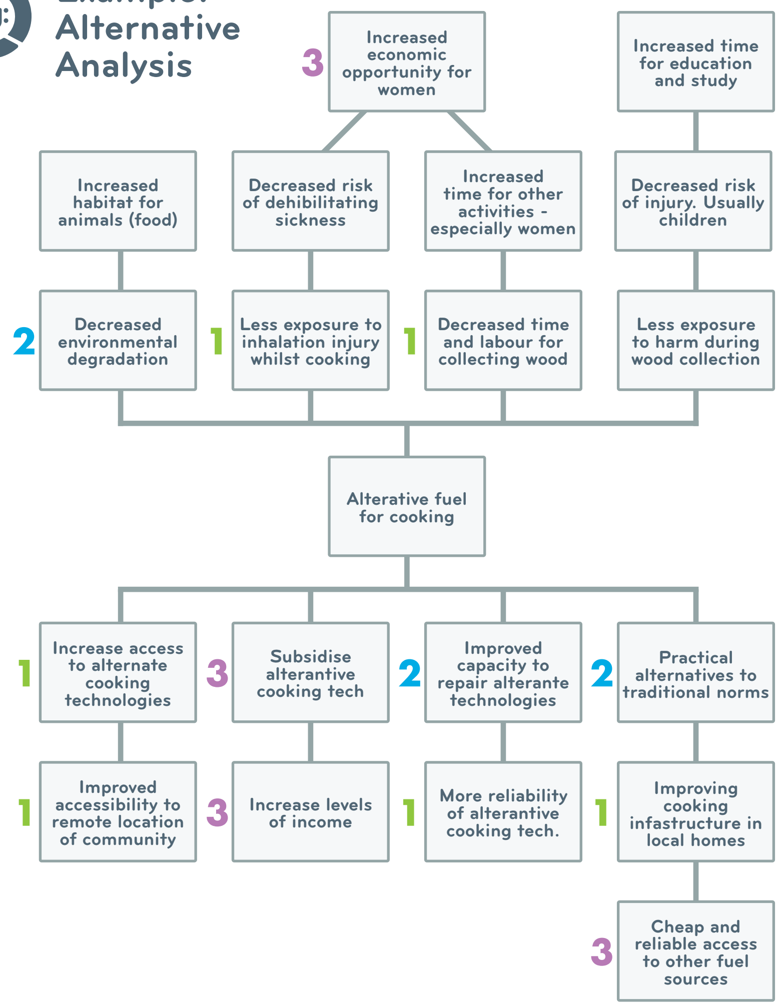
The final process is to identify related groups of objectives that can be linked to a specific type of development strategy. The goal here is to identify the broad types of strategies that are available for meeting your objectives and clarify which type of strategy will achieve each type of objective.

- Think about the broad types of solutions/strategies that could meet each of your specific objectives. Your objectives might be met by a healthcare strategy, infrastructure strategy, education strategy or many other types.
- Analyse your tree as a whole to see how your objectives can be categorised into groups in relation to the specific types of development strategies.
- These categories can often be seen most clearly at the bottom of the tree, so start from the roots and work your way up.

This exercise will reveal an array of alternative strategies that your organisation can use to solve the central problem, as well as meet each individual objective. Keep in mind that different strategies can, and in most cases should, be used together. The purpose of identifying broad categories of objectives is to understand the types of projects that might work and begin thinking about the resources, stakeholders and partners necessary for success.

In the example below you find that the objectives have been marked with three different numbers to represent the three alternative strategies that have been identified. Each number indicates which one of the strategies can be employed to meet the individual objective. In the boxes, the three strategies are named and briefly explained.

Example: Alternative Analysis



1. Infrastructure Strategy

- Focussing upon the provision of new cooking technologies

2. Education Strategy

- Educating community about the hazards of traditional methods and the benefits of newer technology

3. Economic Strategy

- Increase economic opportunity and subsidise new tech, stimulating purchase of new technology

SMART Goals

Specific, Measurable, Achievable, Relevant, Timely

Discover the magic of SMART goals:

Once you have identified your specific objectives, as well as the strategies available to meeting these objectives, it's time to start setting goals.

A renowned project management tool, known through the acronym SMART, is a valuable process to use when setting goals. The concept claims that goals can best be reached when they are:

Specific: clear, focused, concise and well-defined. The more specific you are, the greater the chance you have in achieving you goal.

- Example 1: Provide a new, sustainable, reliable, affordable and easily reparable source of cooking technology to the 26 families of (x) Indian community
- Example 2: Provide an education program outlining the health and environmental hazards of current cooking practice

Measurable: Timelines, dates, costs, beneficiaries, etc. Measuring your progress according to clearly defined parameters ensures you are staying on track and also keeps everyone motivated.

- Example 1: Begin community education program within 1 month of securing new cooking technology from supplier with (x) budget
  > Aim for 100% uptake in women and children engaged in current cooking practices
- Example 2: Provide technology within 3 months of securing new cooking technology
  > Aim for 90% uptake amongst community within 6 months

Achievable: You want to stretch your abilities and resources as far as possible, but you have to be realistic. Know what you are working with and what you can achieve with it.

- Example 1: Begin community education program within 1 month of securing new cooking technology
  > If you can achieve this goal highly depends on your team's experience and skills in community education programs and existing relationships with key community figures
- Example 2: Provide technology within 3 months of securing new cooking technology
  > if you can achieve this goal depends on your ability to either easily produce the cookers yourself or outsource the production of the technology

Relevant: Do your activities match your goal? Is your work going to make the impact you seek?

- Example 1: Provide an education program outlining the health and environmental hazards of current cooking practice
  > Combining the provision of new technologies with an education program that highlights the worth of the new cooking technology helps meeting the central goal of promoting more efficient cooking practices and improve the long-term health of local community members

Timely: When is it going to happen? Can this work be completed in the timeframe that you set? What is the optimal time to ensure relevance to beneficiaries?

- Example 1: Provide technology within 3 months of securing new cooking technology
  > By setting a specific timeframe, the need to partner with other nonprofit organisations or technology producers becomes apparent
  > It's important to give the timeframe some serious thought in order to ensure its' success

Finishing up

The SMART process gives you a framework to question your approach, challenge your perceptions and align your goals to be more effective.

When setting the goals for your project, use both your own experience, as well as the knowledge collected by other organisations to make sure your planning process is both SMART and informed. This will ensure that you achieve your goals and affect change in your community and beyond.

Now that you have a clear and concise goal for your project, **Module 4** will help you identify the people related to your project and to help develop strategies to engage these people in the right way through a Stakeholder Analysis.

This handbook was produced by Grassroots Collective.

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'CEPRODIH's local stakeholders gather in Montevideo, Uruguay.

HANDBOOK 1

MODULE 4

Tools for Effective Project Planning in Community Development

Stakeholder Analysis

An essential tool for effective project planning is the Stakeholder Analysis. It is a tool used by organisations to identify the people related to their project and to help develop strategies to engage these people in the right way. In most contexts community development projects will have a wide-variety of actors.

As such, specifically identifying these stakeholders is essential to clarifying their role and relationship, as well as determining the variety of interests to which you will be accountable when developing or implementing your project.[1]

Download Resources

As you complete this module, refer to:

- **'Resource 9 - PESTLE Analysis'**, p103
- **'Resource 10 - Categorising Stakeholders Framework'**, p104
- **'Resource 11 - Importance and Influence Analysis'**, p105
- **'Resource 12 - Stakeholder Analysis Framework'** p107

Use these resources as templates when you are planning your own project.

[1] Kammi Schmeer. "Stakeholder Analysis Guidelines." WHO

What is a stakeholder?

A stakeholder is anyone who has something to gain or lose from your project. They can generally be placed into three broad categories:

Key Stakeholder:

People, groups or institutions who can significantly influence or are particularly important to the success of your project.

Primary Stakeholder:

People or groups who are directly impacted by your project. These can be both;

- Beneficiaries – Positively impacted
- Dis-Beneficiaries – Negatively impacted

Secondary Stakeholders:

All other people or groups who have a stake or interest in the proposed project or are indirectly impacted by the project.

Stakeholders can be both internal or external to the project itself:

Internal –

People and groups who directly impacted or are part of the implementing team or participatory design process

External –

People and groups who are not directly involved in project design, however have influence over its success or are impacted indirectly (government, other NGOs)

Helpful Hint

Stakeholders in all categories can be both positively and negatively impacted – it's important to identify your likely critics so you can find strategies to help get them on-board.

A Stakeholder Analysis will help with:

- Identifying the stakeholders for a program or project, including both potential critics and supporters;
- Identifying possible obstacles to project implementation;
- Grouping stakeholders by their level of influence, what is important to them, and/or what they could contribute to the process;
- Understanding how you can engage stakeholders to foster local ownership and create a sustainable development project.

Who should be involved when undertaking a Stakeholder Analysis?

Whilst the initial brainstorming-process might take place amongst your team, a Stakeholder Analysis is predominantly a participatory process that is best achieved by directly consulting with actual stakeholders. A great way to start your participatory approach is by holding focus groups or workshops with obvious primary stakeholders. These sessions are important because they will lead to the organic growth of your stakeholder list; with local beneficiaries identifying stakeholders that might not have been initially obvious to your team. Being open to inputs from beneficiaries and the broader community gives you the best chance of identifying all relevant stakeholders and accounting for any previously unforeseen connections, challenges and opportunities.

Completeing a Stakeholder Analysis in 4 Easy Steps

STEP 1
BRAINSTORMING FOR STAKEHOLDER GROUPS AMONGST YOUR TEAM

STEP 2
IDENTIFYING CATEGORIES OF STAKEHOLDERS AND UNDERSTANDING WHY THEY ARE IMPORTANT

STEP 3
PRIORITISING YOUR STAKEHOLDERS

STEP 4
UNDERSTANDING YOUR KEY STAKEHOLDERS

STEP 1
BRAINSTORMING FOR STAKEHOLDER GROUPS AMONGST YOUR TEAM

The first step is to identify the obvious primary stakeholders amongst your project team. Once you have identified obvious stakeholders, it's time to get out into the community and consult directly with as many stakeholders as possible as outlined above.

- The best techniques for gathering information are workshops, focus group discussions and 1-on-1 interviews.
- Whilst the practicality of visiting all stakeholders may pose significant challenges, failing to consult key parties may skew the analysis and risk the efficacy of your project.
- Other ways you can contact stakeholders include e-mail, Skype, phone call or social media.

A useful tool to help the brainstorming process to identify stakeholders is the PESTLE model. This can assist you in working through possible categories where stakeholders relevant to your project may exist.

Download Resources

You can find a template for this tool in **'Resource 9 - PESTLE Analysis'** on p103. Use this resource as a guide when planning your own community development project.

Political Example:

- Relevant government departments who may be able to provide funding
- Relevant lobby groups who might advocate for or against your project such as a religious group lobbying against a planned parenthood project

Economic Example:

- Funding agencies or donors who might support your work
- Local businesses that might receive more (or less) business due to your project such as existing money lenders who might be negatively affected by a micro-financing program

Social/Culture Example:

- Specific cultural or ethnic groups that might be empowered or marginalised by your project
- Gender groups that might react differently to your project such as men looking unfavourably upon a project to promote women's economic independence

Technological Example:

- Companies whose equipment you may need to purchase
- Skilled tradesmen who may be needed to repair any broken equipment

Legal Example:

- Government departments who may be required to 'sign-off' on local projects

Environmental Example:

- There is a growing school of thought saying that the environment itself (and how it benefits or suffers from your project) should be considered a stakeholder
- It may not be relevant to all projects, however for a project promoting solar powered cooking, one could consider the local environment as a stakeholder, as timber will no longer be required to cook

STEP 2
IDENTIFYING CATEGORIES OF STAKEHOLDERS AND UNDERSTANDING WHY THEY ARE IMPORTANT

Once you have your list of stakeholders, it's time to start placing them in the three main categories: Key, Primary or Secondary Stakeholder.

During this step, it is important to begin thinking about why and how each person or group is a stakeholder in your project. Next to each stakeholder, make a note of the specific interests they might have in the project and whether this is likely to be a positive or negative interest.

eg: **Example: Throughout this module, we will use the example of a money lending program couple with an infastructure project to help rural farmers in Ethiopia improve their irrigation systems.**

Stakeholders	Interest in project	Positive or negative interest?
Key Stakeholders:		
• Irrigation system suppliers	Increased sales as providers of irrigation technology	+ (selling more products)
• Local government officials	Opportunity for stronger local economy and increased job security for rural farmers	? (Likely positive, however dependent upon political agenda)
Primary Stakeholders:		
• Rural Farmers	Increased earning capacity	+
• Local labourers who construct systems	Increased earning capacity	+
• Local community	Increased supply of local fresh food	+
Secondary Stakeholders:		
• Market salesmen	Increased access to produce. May lower purchase price from farmer, improving profit margin	+ (however may be some negative impacts of increased competition)
• Food importers	Decreased sales due to increased local supply	-
• Other Money Lenders	Decreased trade	-
• Other NGOs supporting local community	Opportunity for collaboration to support local community, however may perceive project as competition	+/- (dependent upon relationship)
• Broader government	Opportunity for taxation upon imported agricultural technology. Unknown impacts upon existing national agricultural programs and food supply systems.	+/- (increased taxation, decreased reliance upon social welfare, however national government may dislike NGO empowering locals)
• Local Journalists	Reporters of current affairs in community	+/- (dependent upon their opinion of the project)

STEP 3
PRIORITISING YOUR STAKEHOLDERS

Next you need to rate your stakeholders in relation to their importance and influence.

- **Importance** – the priority given to satisfying the needs and interests of each stakeholder.
- **Influence** – the degree of power which the stakeholder has over the planning and implementation of intervention/activity.

Helpful Hint

The opinions and influence of the most powerful and influential stakeholders can help shape your project. Including them early in your planning and design makes it more likely that they will support you and offer valuable input.

Often you will find that the most important stakeholders, may have very little influence on the project's success, and vice-versa. Whilst this can be frustrating when trying to stay accountable to different stakeholders, a detailed understanding of these power-dynamics will help you focus attention where it is needed most.

Example: An Importance and Influence Analysis of stakeholders relevant to the Ethiopian irrigation program.

Stakeholder	Importance (1-5)	Justification	Influence (1-5)	Justification
Irrigation system suppliers	3	Secondary importance - we hope to foster the development sustainable technologies	5	Set price and availability of essential equipment
LocalGovernment Officials	2	We hope to strengthen local governance, however they are not focus of project	5	Without sign-off on water access, project cannot proceed
Rural Farmers	5	Primary beneficiary for all activities	3	May lobby together for changes
Local Labourers	4	Important secondary benificiaries of activities, boosting local economy	2	Unskilled labour could be found elsewhere
Local Community	4	Broader primary beneficiaries for all activities	2	Project targeted to farmers rather than community more broadly
Market Salesmen	3	Local middle-class. Not primary benificiaries, however important to strengthen local economy	3	Could lower purchase price for farmers given increased supply
Food Importers	1	Not the focus of this project	2	Could potentially flood supply further and drive down local prices, but unlikely
Other money lenders	1	Not focus of this project.	4	Could cut off farmers from future borrowing, decreasing economic stability
Other NGOs	2	This project does not directly interact with other projects in the region.	2	Could offer support in increasing project uptake
Broader Government	2	Satisfying interests of broader government is not priority of project	3	Could jeopardise project if import permits for technology are withheld
Journalist	1	Satisfying the intersts of local journalists is not of importance to project success	2	May promote project. May influence public opinion, thus influencing uptake

Visualising the Importance and Influence of your stakeholders:

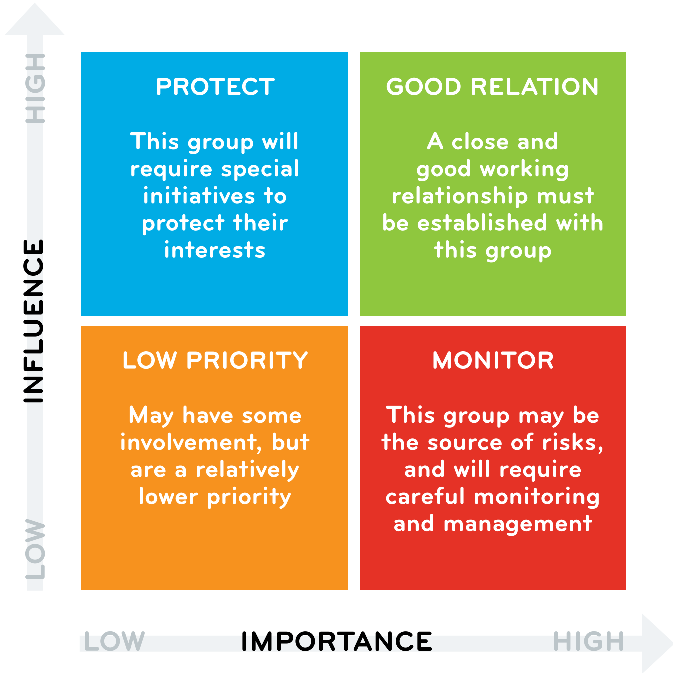
Once you have identified the importance and influence of different stakeholders, you can use an **Importance/Influence-Grid** to visually organise stakeholders according to their influence (power) and interest in your project. With this analysis you can gauge how influential the stakeholders will be on your project and then deduce the appropriate cooperation strategy.

The grid is broken up into four key areas with the stakeholders that fall in the top right corner being the most important to your project's success. It will be important to create strategies to ensure these stakeholders support your project. Sometimes this will be related to existing relationship your team may have with influential actors, otherwise it might mean identifying important connections that need to be made in order to facilitate your work.

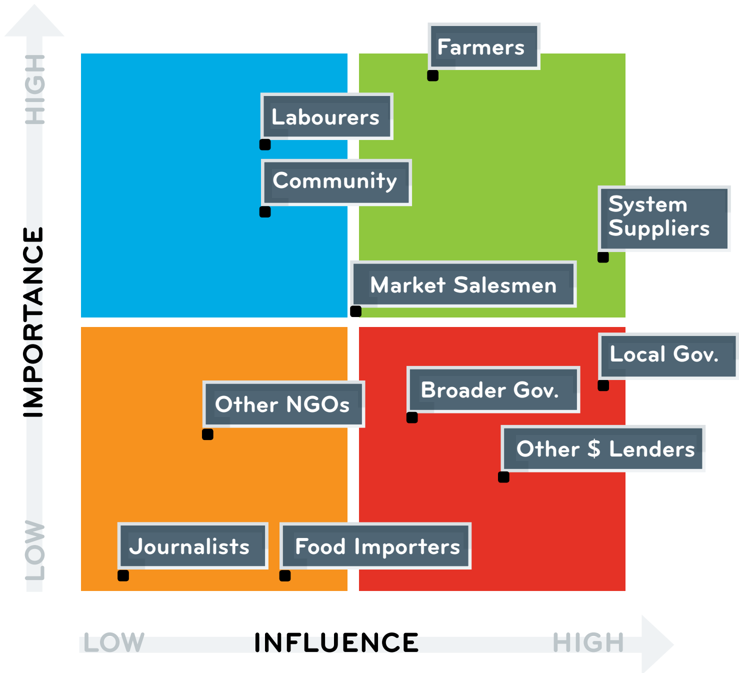
Based on the positions of stakeholders within the matrix, you can later determine the approach and cooperation model for each stakeholder.

Helpful Hint

Using an importance/influence grid is a great way to check whether you have correctly identified your 'Key stakeholders'. These will generally be in the top right corner of your graph in the 'Key players' segment. If you notice a stakeholder form another category that is high in this section of the graph it might be worth re-considering whether they should be considered a 'key stakeholder'.



Example: A Stakeholder Importance/Influence Grid for our Ethiopian irrigation program.



STEP 4
UNDERSTAND YOUR KEY STAKEHOLDERS

Once you have collected all the necessary information, you can put it together into a final Stakeholder Analysis that connects different stakeholders with your proposed project.

- Some of your stakeholders will be actors you have already established relationships with, whilst others will be groups or individuals you may need to reach out to.

This final step will allow you to identify potential risks. understand how you are going to approach your key stakeholders for support and decide which of your team members is responsible for looking after each stakeholder.

eg: **Example: A small section of the completed Stakeholder Analysis from our Ethiopian irrigation program. When completed, there should be one line of horizontal analysis for each stakeholder.**

Stakeholder	Interest in Project	Likely impact upon success	What do they contribute?	Potential risks	Approach	Who is Responsible?
Local Government Officials	This project will provide a significant improvement in agricultural capacity and local economy. Officials may seek to align with our project for (free) political capital associated with success	High	Provide building permits essential for irrigation system construction, as well as permits for access to public water supply	If they perceive project as threat to see their political or economic position, they may create regulatory obstacles to prevent success.	Establish contact and build relationships with officials responsible for provision of permits	Our organisation's Project Manager
Local market salesmen	Likely benefit indirectly from project due to increased supply of local produce. This should result in increased business and opportunity for expansion, fostering local economy.	Medium	Market salesmen essential to maintaining a stable demand (at a fair price) for increased supply to ensure trickle-down economic benefit to farmers	Could potentially drive down purchase price from farmers due to increased supply, leaving farmers worse-off	Direct engagement with stall owners. Ensure they have capacity for increased supply.	Our organisation's local field staff
Local Journalists	Local journalists cover events impacting upon locals	Low	Could influence political stakeholders or foster positive public opinion	Could potentially politicise our project, dependant upon political affiliation of news outlet	Provide details through direct contact with editor of local paper	Our organisation's Communications Manager

Download Resources

You can find a template for this tool in **'Resource 12 - Stakeholder Analysis'** on p107. Use this resource as a guide when planning your own community development project.

The wider the scope of your project, the more people may be affected. As a result, your actions could have wide-spread impacts, and a variety of actors may have power and influence on your project, as well as be affected by it. Those actors could be champions or impediments to your work. Identifying different groups and needs early on can help you prepare an effective approach and ensure that appropriate levels of engagement are factored into your planning and design.

Finishing up

Now that you have completed your Stakeholder Analysis, it's time to start designing your interventions. In the next module, **Module 5**, we will use a feasibility study to identify the best type of intervention for your project.

This handbook was produced by Grassroots Collective.

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'Pasos' beneficiaries inspect their bee-hives in Bolivia.

HANDBOOK 1

MODULE 5

Tools for Effective Project Planning in Community Development

Choosing the best type of intervention for your project

In **Modules 1-4** we discussed the basic stages of project planning. Now it's time to start designing the specific interventions that your project will use to address the problem. When choosing an appropriate intervention, it's important to identify all alternative options, not just the obvious ones that your team might think of first. This way, you can assess different intervention strategies according to pre-set criteria to help choose the best solution for you.

When completing this module, remember that the main goal is to identify WHAT you are going to do. The HOW you are going to implement it comes next in **Module 6** where we will use the 'Theory of Change Framework' to design an implementation strategy.

Download Resources

As you complete this module, refer to:

- **'Resource 13 - Identifying Interventions Checklist'**, p109
- **'Resource 14 - Solution Analysis Framework'**, p114

Use these resources as templates when you are planning your own project.

Choosing an Appropriate Intervention

For any given development problem, there is generally a multitude of different solutions. Indeed, as the saying goes, 'there are many ways to skin a cat'. Taking the time to identify and then analyse your options against a specific set of criteria is essential to creating sustainable and durable development interventions.

Use this 5-step framework to guide you through the process of choosing the best initiative to solve your development problem.

Helpful Hint

Whilst it is useful to consider interventions separately, your final project may consist of two, or even three, solutions all working together to help re-enforce your mission. For example: the combination of a hand hygiene education program with an infrastructure project to install water filtration systems are two distinct interventions, however they would work together to reduce the incidence of cholera in a remote community.

STEP 1 Brainstorm possible choices

STEP 2 Eliminate the bad ideas

STEP 3 Refine 3-5 options

STEP 4 Develop criteria for final choice

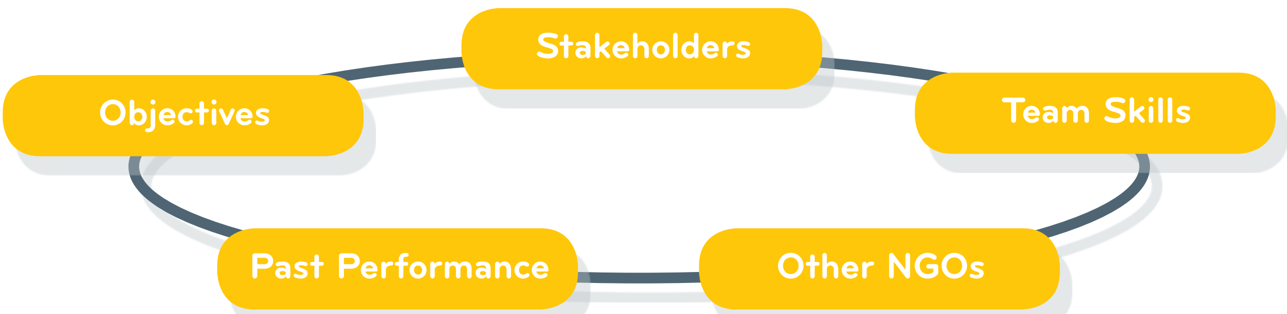
STEP 5 Complete Solution Analysis

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5

Brainstorming for possible solutions

By simultaneously looking at your objectives, stakeholders, team's skills, past performance and how other organisations have solved problems similar to yours, you can begin building a broad list of possible interventions. Try to list as many interventions as possible without thinking too much about how appropriate they are. The unrealistic ones will be eliminated in the next step.

There are five key factors to consider when looking for possible interventions that might achieve your organisations goal.



Objectives

Identify possible interventions by examining your objectives	Look at your objective tree and start making a list of all the different ways you could reach each one of your objectives:
	Start by working within the different broad strategies you identified in your Alternative Analysis from Module 3. Brainstorm specific projects within these categories, to identify solutions that might meet multiple objectives in your tree at the same time.
	Be critical: If an idea for a solution doesn't seem to address any of your objectives directly, it's probably not going to work.

Stakeholders

Identify possible interventions by examining your stakeholders	Think about the best fit for your primary beneficiaries: • What types of projects are they likely to be enthusiastic about? • Do these initiatives meet the needs and values identified by the local community?
	Think about the types of projects that will inspire your key stakeholders to support your project.
	Think about the specific types of support your stakeholders can provide your organisation and capitalise on that: • **Example: If your project meets a specific government priority, you might be eligible for a government grant.** • **Example: If your organisation has a good relationship with a local business, consider a project that maximises the support they could provide.**

Team Skills

Identify possible interventions by examining your team's skills	Think about the skills your team has and name solutions that work to these unique skill sets:
	If you think a solution is going to be really effective but are worried that your team doesn't have the skills for it. • Think about ways they can learn the skills, or • Find someone who has the skills (by partnering with other non-profits, advertising for volunteers, recruiting new staff).
	If you have the funds, consider outsourcing small, key elements of your work. This can be the easiest and quickest ways to have specific, technical tasks completed by a skilled person.

Past Performance

Identify possible interventions by examining your past performance	Reflecting on past experiences is the key to success in the future. Ensure that you are looking back at your own evidence and previous performance.
	After completing a project, take the time to reflect upon your work; think about what worked and what did not.

Other NGOs

Identify possible interventions by examining your neighbours	If the work you are seeking to undertake is completely new to you, look to other organisations: • Often, they will readily share information publicly, whether through their own website or through associated networks. • Research online, trawl social media (Linkedin can be especially useful for this) and explore media sources like Great Big Story, The Guardian Development or here on the Grassroots Collective to learn about new, innovative solutions to local problems.
	Researching the results of particular projects can tell you a lot about tactics, approach and even feasibility.

Helpful Hint

Be as specific as possible when writing down possible solutions. This will make choosing the best option much easier as you have already done your research. Whilst researching and investing into solutions you may never use, takes time, it's still necessary in order to choose the best one.

Download Resources

You can find a template for this tool in; **'Resource 13 - Checklists for Identifying Possible Solutions'** which can be found as a download alongside this module on our website. You can use this resource as a template when planning your own project.

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5

Eliminating least appropriate solutions

Once you have a long list of possible solutions, you need to eliminate the least realistic ones. You can do this by using 'knock-out' criteria. These are existing limitations upon the size, type or scale of your project that organisations cannot change. These might mean eliminating solutions that:

- Are appropriate and valuable but are unable to be executed by your organisation because they are totally unaffordable.
- Are likely to collapse if you pull out your resources and move on to another project. This is not a sustainable intervention.
- Are appropriate and valuable, but your organisation has no understanding of the skills required to provide this type of solution.
- Are too risky given the current social or political context.

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5

Identify and thoroughly examine 3-5 solutions that best meet your project objectives

By eliminating unrealistic or unsustainable solutions, your team should be left with 3-5 possible interventions. Now your job is to detail these solutions, gathering as much information as you can to understand how each intervention will function within your community. You should consider:

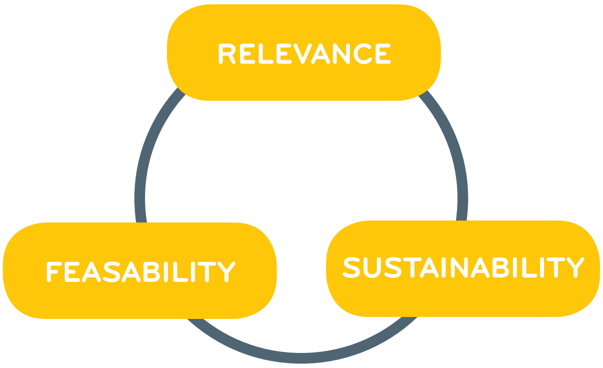
- How well does the intervention solve your problem and meet your objective?
- Who will be involved in the intervention process?
- How will you fund the intervention?
- How sustainable is the intervention?
- How well will your organisation be able to undertake this intervention?

The aim of this step is to obtain a thorough understanding of the practicalities around executing each different intervention strategy in your community.

STEP 1 STEP 2 STEP 3 **STEP 4** STEP 5

Identifying specific criteria to assess your final options

The criteria that your organisation uses to assess the appropriateness of each possible solution comes down to three key themes:



These are guiding themes that will help you choose the specific criteria by which you assess your 3-5 remaining solutions. It is important to remember that these are not the criteria themselves. Instead, these themes should be used as a guide to help **you identify your own specific criteria relevant to your project.**

Below, we will explore the three themes – relevance, feasibility, sustainability - individually to help you identify specific criteria for your project. The aim is to create a list of relevant criteria for your project objectives and the 3-5 solutions you are assessing.

If you are having trouble identifying criteria during this step, try to think about:

- **Social criteria:** Distribution of costs and benefits, gender issues, socio-cultural constraints, local involvement and motivation;
- **Environmental criteria:** Environmental effects, environmental costs versus benefits;
- **Technical criteria:** Appropriateness, use of local resources, market suitability;
- **Institutional criteria:** Capacity, capability, technical assistance;
- **Economic criteria:** Economic return, cost effectiveness;
- **Financial criteria:** Costs, financial sustainability, foreign exchange needs;

Helpful Hint

It is important that throughout this process, you consult with the community and involve beneficiaries and relevant stakeholders in the decision-making process. They may have a very different opinion upon how a different project might work and how relevant, feasible and sustainable it might be.

RELEVANCE

Aim is to identify:
How well does each proposed initiative meet your organisation's objectives?
If a project does not directly meet multiple objectives outlined on your Objective Tree, it's probably not the right option.

Remember to:

Involve community members when assessing relevance.

- Beneficiaries MUST perceive it as relevant to meeting the objectives, otherwise they are unlikely to engage with the project.
- Community members might not always see the value of a given activity, it's important to provide ample information and be patient in explaining the benefits (or even design an education program to accompany your solution).

Remember to:

Involve other stakeholders to ensure impartiality of your assessment.

- It can be difficult to appraise something that you have been intimately involved in producing, simply because you are so close to the content and its background that you fail to be objective.
- Someone outside the project planning team can see obvious discrepancies, assumptions, omissions and oversights
- Community members are a great option here.

eg: Example:

An organisation seeking to reduce the deaths of coffee plantations in a community is assessing possible solutions, two of which include netting over the plantations to stop birds eating the plants or using a natural pesticide to kill of insects. After speaking to local farmers, they are told that birds don't actually visit these coffee plantations because they are high up in the mountains.

A criterion to assess relevance here would be: Efficacy at reducing plant deaths.

In this example, a netting option would poorly meet this criterion, whilst a pesticide program might score highly.

FEASABILITY

Aim is to identify:
How realistic and practical each initiative is?

Feasibility can have many different aspects:

- Economic feasibility: Can you afford to provide this project?
- Skills feasibility: Does your team have the necessary skills to undertake this project?
- Time feasibility: Does your team have the time to devote to this project?
- Experience feasibility: Has your NGO done a similar project to this before? If it was successful, there is a good chance this one will be, too.

Remember to:

Consider risks:

- What is the likelihood that the project will be successful?
- How complex is the project?
- Could the project fall fowl of politics? Does it require approval from a government office that might oppose the project?
- Does your project rely upon one or two key stakeholders who might be donating their time or money? If they were to pull out, do you have a back-up or will the project collapse?

Remember to:

Do some research and ask other NGOs:

- They will most likely be able to tell you about the troubles or roadblocks they experienced on a similar project.

eg: Example:

An organisation hoping to provide irrigation systems for farmers in a rural Chilean community is assessing different suppliers to use. They have run similar programs previously using an Argentine supplier to provide improved systems. They are assessing three options: one is from the same supplier whilst the other two are from new suppliers. The Argentine supplier they have used previously uses expensive, high quality material, however they have a good relationship with this supplier. The other two suppliers are much cheaper, however they have no relationship with them. They have a small budget and want to have the greatest impact for their money.

A criterion to assess feasibility here could be: Financial Affordability. Another could be: Likelihood of gaining a discount from the supplier. In this example, the Argentine supplier would poorly meet the first criteria, but would score more highly in the second.

SUSTAINABILITY

Aim is to identify:
How long will the positive effects of each initiative last once you are gone?
You need to assess the type of long-term relief your project can provide to your beneficiaries and the community.

Remember to:

Consider how likely it is that the community will take on ownership of the project and keep it going?

- Are they ready to undertake any periodic maintenance or innovation themselves?
- Can you involve local community members from the beginning of the project and train them so you can hand it over at a later date?

Remember that:

Whilst your organisation might be based within the community, your attention might turn to other projects in the future.

- If you were to withdraw your resources or staff from the project, would it continue to function?

eg: Example:

An organisation seeking to provide an ambulance in a rural Indian community is assessing possible vehicles to use. They are comparing a German, Japanese and Chinese produced vehicle. Because it is a vulnerable community, most people use Chinese cars. Although they often breakdown, local mechanics are adept at repairing them.

A criterion to assess sustainability here could be: Ease of repairing vehicle locally. Another criterion could be: How often it will likely require repair?

Whilst the Chinese vehicle would score highly for the first criteria, it would perform poorly against the second. On the other hand, the German vehicle is far less likely to breakdown, however it would be difficult to repair in the community.

STEP 1 STEP 2 STEP 3 STEP 4 **STEP 5**

Choosing the best solution using a Solution Analysis Framework

Now that you have a list of your criteria, it is time to apply them to a Solution Analysis Framework in order to identify the best possible intervention for your project. This is a four-step process.

1. Place your problem and the possible solutions on the left-hand side of the table
2. Place your criteria along the top of the table
3. Now give each possible solution a ranking of 1-10 based upon how well it meets that criteria
   - Ensure that 1 represents a poor outcome and 10 represents a positive outcome.
   - Example: For initial cost, 1 would be the most expensive and 10 would be the least expensive
4. Once you have completed this process for all your solutions and criteria, you can add up all the numbers in your table and use that as a guide to help you choose the most appropriate solution. Usually, the solution with the highest number in total is the one with the most positive outcome.

eg: Example: Solution Analysis Framework

An example Solution Analysis Framework can be found below. This analysis compares the relevance, feasibility and sustainability of three different cook stoves to replace wooden cook stoves in a rural Indian community.

Problem	Proposed Solution	Initial Cost	Ease of Maintenance	Cooking Efficiency	Ease of Use	Longevity	Environmental Impact	Total
Unsafe and Inefficient Cooking Practices	Biogas Stove	8	8	6	10	10	1	43
	Solar Stove	6	6	2	6	6	10	36
	Improved Cook Stove	4	10	10	10	8	6	48

The reference key for the previous Solution Analysis Framework Example is outlined here:

- Initial cost – most expensive (1) to least expensive (10)
- Ease of maintenance – difficult (1) to easy (10)
- Cooking efficiency – slowest to cook (1) to quickest to cook (10)
- Ease of Use – most difficult (1) to easiest (10)
- Longevity – most fragile (1) to most robust (10)
- Environmental impact – most negative (1) to most positive (10)

This example identifies that the improved cook stove is likely the most appropriate solution to help improve cooking practices in this rural Indian village.

Finishing up

At the end of this process, you should have decided upon what your project will look like! Congratulations! You now know the 'WHAT'. Next, it's time to work out HOW to successfully implement your project using the Theory of Change framework in **Module 6.**

Download Resources

You can find a template for this tool in; **'Resource 14 – Solution Analysis Framework'** which can be found as a download alongside this module on our website. You can use this resource as a template when planning your own project.

HANDBOOK 1

Tools for Effective Project Planning in Community Development

'Pasos' beneficiaries at their organic agro-project in Bolivia.

MODULE 6

Linking goals and interventions to measurable outputs – Theory of Change

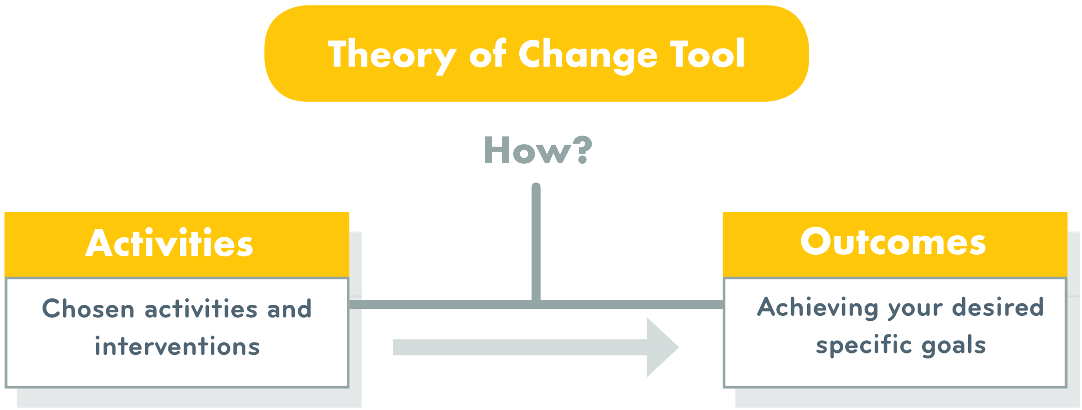
Having identified what your desired objectives are in **Module 3** and what your project activities will look like in **Module 5**, it's now time to explore how you will implement your chosen activities to achieve your goals. In this module, we will introduce the 'Theory of Change' (or ToC), a method for planning your implementation strategies, identifying the key participants and developing methods of evaluation.

Download Resources

As you complete this module, refer to: **'Resource 15 – Theory of Change Framework'** which can be found on page 115. Use this resource as a template when you are completing your own Theory of Change analysis.

How will your activities achieve your outcomes?

In the previous module, we explored how to transform your specific goals into actionable activities. In this module, we will use the Theory of Change tool to understand how your actionable activities can be used strategically to best achieve your desired outcomes.



The ToC-tool visually represents the change process of your project

- It highlights the way your organisation believes specific activities will have an impact, and why the chosen activities will result in a desired change.
- It shows how a group of early and intermediate actions will start the process of reaching long-term goals.
- It focuses on the gap between what a program does (its activities or interventions) and how these lead to the desired goals being achieved, transforming your project into a series of actionable tasks.
- It's a reverse engineering tool: It identifies a chronological series of activities and interventions by back-tracking from the long-term change your organisation seeks to achieve

What does the theory of change achieve?

The Theory of Change creates a series of '**outcome pathways**', in which one activity leads to one small change, and then another change, and then another, ultimately leading to the achievement of the desired long-term change.

The Theory of Change helps to create a step-by-step series of outcomes that will each individually move you closer towards achieving your long-term change.

- It links specific activities to concrete outcomes.
- It does this by breaking your project into a series of manageable, chronological steps.
- It allows you to look at your interventions visually, translating your thinking into a diagram that provides an overview of the activities you need to implement.
- After completing your Theory of Change, you will be able to see a series of clearly defined and practically achievable steps needed to reach your goal.

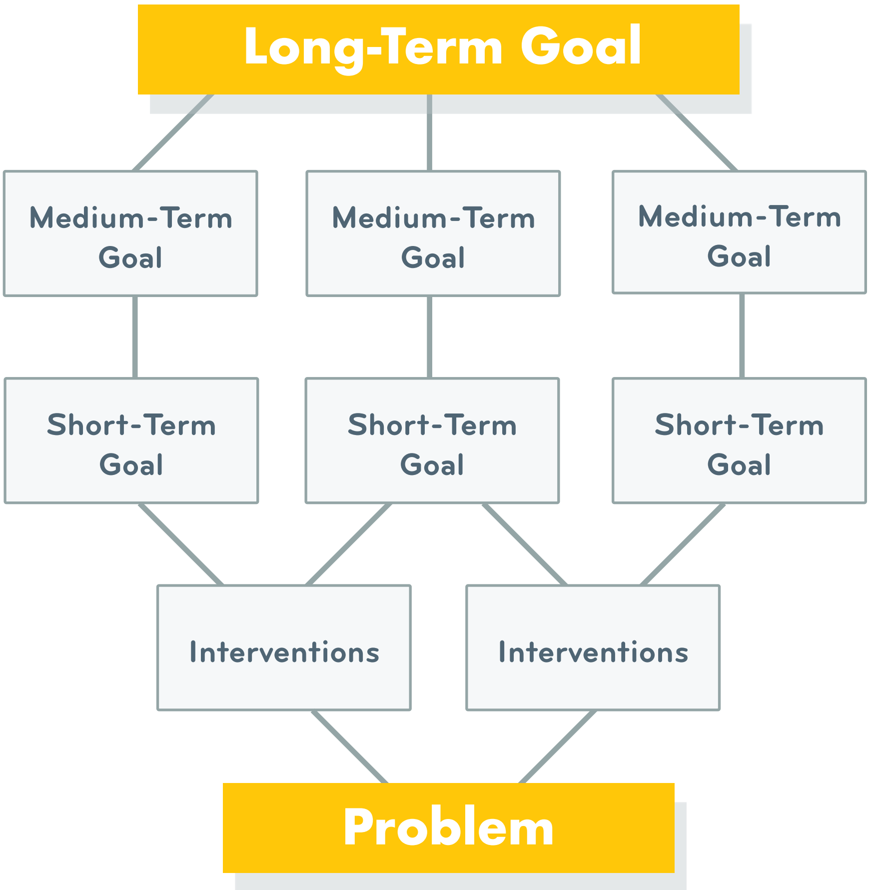
When to use the Theory of Change tool?

Before starting to work with a Theory of Change, you should have gone through a series of steps of project planning. Make sure you have the following in place:

A checklist before undertaking your Theory of Change analysis:

- ☑ You have established the context of your work and are aware of the specific social, political and environmental conditions. **If not, see Module 2 Situational Analysis for more details.**
- ☑ You have set SMART goals for your project or activity. **If not, see Module 3 Realistic Goal Setting for more details.**
- ☑ You have identified other actors who are able to influence change. **If not, see Module 4 Stakeholder Analysis for more details.**
- ☑ You have an idea of the types of interventions at your disposal to help you achieve your goal. **If not, see Module 5 Choosing an Appropriate Intervention for more details.**

The Theory of Change tool allows you to visualise the long-term change you seek.



Steps to developing your Theory of Change

Helpful Hint

It is essential to think 'Big Picture' when you are using the Theory of Change tool. Try to look beyond the specific problem you are trying to solve in your community. This means that your organisation's project may not be central to the overall problem in your Theory of Change framework and you should not solely think about your own activities.

You need to think about the broader problem (e.g. gender inequality, economic inequality or poor access to education) and how your project might function as a small step towards achieving a solution to this big problem. Think about where your interventions fit into the wider picture. Don't be afraid to think critically and try to be objective.

Step 1

First, you need to identify the long-term change you are seeking.

- What is the problem you have identified in your community?
- Who are the people you are trying to help?
- What impact do you want to have on their lives?

This should be a single statement that represents the specific, long-term change that you believe your project can help achieve. Remember, this is NOT the specific goal of your project. You should have an idea of your long-term change from **module 2.**

Example for a long-term change:
Reducing the number of women dying during childbirth in Cuenca, Ecuador.

Example of what would NOT be a long-term change: Improving women's understanding of the risks of unassisted childbirth at home through education workshops in vulnerable neighbourhoods of Cuenca.

This is a specific project goal; a great project that would certainly help reduce maternal mortality, but it is not the ultimate long-term goal. It is one step towards achieving the long-term change.

Step 2

Next, you need to establish the pre-conditions necessary so that this long-term change can occur.

- What individual actions are required to achieve the long-term change you identified in step 1?
- The key here is reverse-engineering! Start by mapping the route backwards from your long-term goal and outline the processes or sequence of events that you anticipate will lead to long-term change.
- Start with over-arching long-term goals, then work through the intermediate or medium-term changes and then, finally, detail the immediate, short-term activities you need to put in place.

eg:

Example: Ecuadorian Maternal Health project

Long-term change:

Reducing the number of women dying during childbirth in Cuenca, Ecuador.

Medium-Term pre-conditions:

- Improving women's understanding of the risks of unassisted childbirth
- Ensuring that women get to hospital quickly if an emergency occurs during childbirth
- Improving the quality of maternal healthcare available at the local hospital
- Ensuring that the local hospital has the specific tools required to help prevent a mother's death during childbirth

Short-Term pre-conditions:

- Lobby for funding from local government to have a permanent obstetrician at the local hospital
- Create a campaign to promote blood donations so that blood is available for women who are at the local hospital during an emergency
- Create an ambulance service to transport women suffering an emergency during childbirth, or, if one already exists, provide specific training to paramedics to help them manage this condition
- Provide workshops for local women of childbearing age to promote safe childbirth practices

Step 3 Now that you have a series of 'changes', you should be able to see the 'outcome pathways'

These are the causal linkages between the various 'changes' and are used to map the identified changes and show each outcome in both a logical relationship to all the others, as well as in a chronological flow.

eg: Example: Ecuadorian Maternal Health project

The short-term pre-condition related to the 'lack of emergency transport' will be broken down into an outcome pathway that represents a series of individual goals that will help solve this component of the long-term problem. The key is to work backwards from the long-term goal, reverse engineering the outcome pathway.

1. **Long-term Change** = Preventing women from dying during childbirth
2. For this to occur, you have to ensure that there are ways for women to be transported to hospital quickly if an emergency occurs during childbirth.
3. A) Ensuring that women can be transported to hospital quickly means that a 24/7 ambulance service must be available in the community.

   B) A second element to ensuring women can be transported to hospital quickly is making sure that the community actually utilises this ambulance resource.

   This leads to your outcome pathway splitting into two parts!

4. A) To make an ambulance available 24/7 in the community you will need to obtain an ambulance, train paramedics and build an ambulance station.

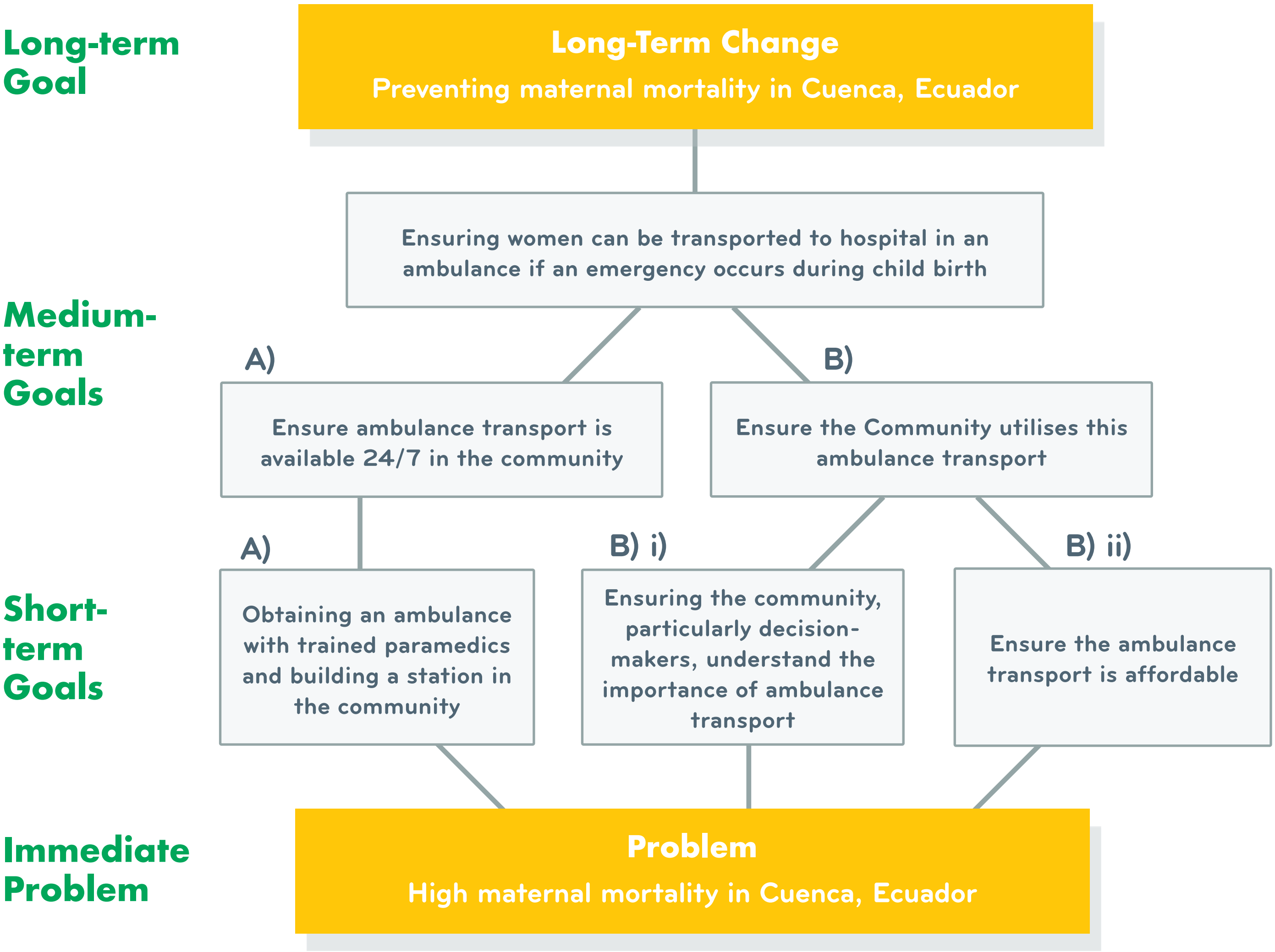
   B) i) To ensure the community utilises your ambulance you will need to educate them as to why an ambulance is important, particularly husbands who are the primary decision makers.

   B) ii) However, a second element to ensuring the community utilises your ambulance is to ensure it is affordable.

   This leads to your outcome pathway splitting into two parts again!

See the next page for a graphical presentation of the example given here where you will find A), B), B) i) and B) ii) clearly marked in reference.

Example: Ecuadorian Maternal Health project



Now this outcome pathway is completed. If you read from the bottom up, you will be able to see clearly the series of small steps required in this pathway. These will, one by one, help to ensure that women can get to hospital quickly if an emergency occurs during childbirth.

Remember, this is just one outcome pathway related to only one of the medium-term pre-conditions that were identified earlier. If you were to complete this process for all the medium-term pre-conditions - which is advisable - you will end up with a very large, and thorough, series of small, achievable goals

Step 4

Now that you have a series of specific goals, it's time to turn them into intervention strategies.

Because you have now turned your complex, long-term change into a series of smaller, more easily achievable goals, the process of developing specific, manageable interventions as part of a broader strategy should be much easier.

eg:

Example: Ecuadorian Maternal Health project

Let's look at Pathway A) first:

- To provide a 24/7 ambulance within the community you will need to build an ambulance station and train paramedics. Because your organisation has neither builders or paramedic in the team, you will need to contract these functions out. To afford this, you will need to fundraise.
- You will also need to obtain a registered ambulance. The best way to do this would be to lobby the local government to give your community a reserve ambulance that is currently sitting idle in the nearest city, over 100kms away.

Now let's look at pathway B) i):

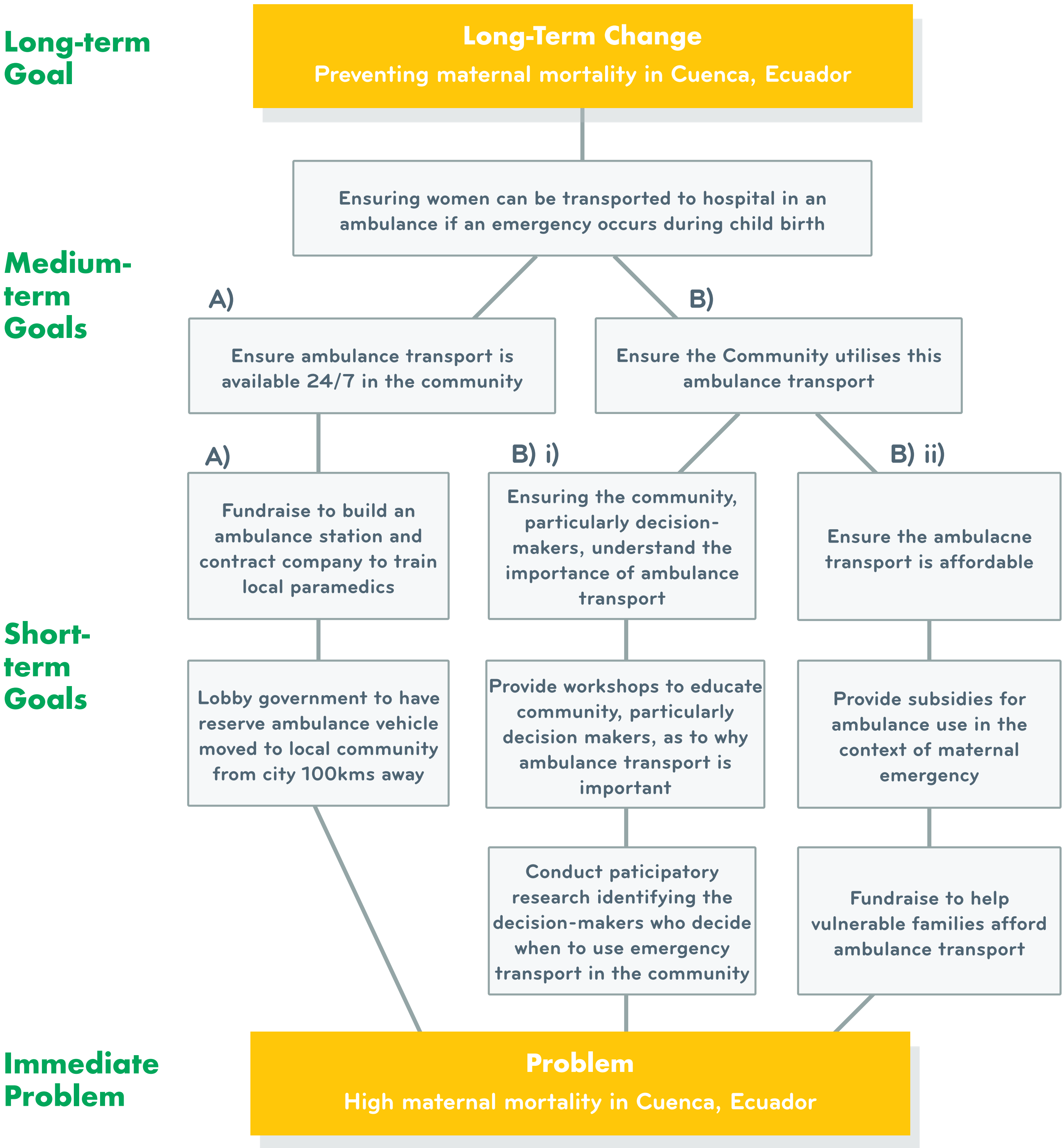
- To educate the community as to why ambulances are important, you could provide community workshops, specifically focussed at decision-makers (often husbands and mother-in-laws).
- In order to provide an effective workshop, you will need to develop a curriculum to ensure that they run smoothly and thoroughly explain why ambulance transport is so important.

Finally, let's look at Pathway B) ii):

- To ensure ambulance are affordable for everyone, you will need to provide subsidies for ambulance transport specifically for women suffering an emergency during childbirth.
- In order to provide these subsidies, you will need to fundraise. It might be best to target the poorest members of the community in the initial stages of your project whilst you have only limited funds.

See the next page for a graphical presentation of the example given here where you will find A), B), B) i) and B) ii) clearly marked in reference.

eg: Example: Ecuadorian Maternal Health project



Now, you can see a series of clear interventions that will help you achieve your short-term goals which, in turn, will lead to your desired medium and long-term changes.

Step 5

Finally, you now need to develop indicators to assess the performance of your interventions

Indicators do not need to be exact at this stage. At this stage, it is ok to identify ideas for indicators and rough targets. We will be exploring Monitoring and Evaluation strategies in more detail, including identifying specific indicators, in our next module, **Module 7.**

- Each outcome should have its own specific set of indicators.
- Being able to highlight immediate results and outcomes will enable you to show others how your work is making an impact.

Example: Ecuadorian Maternal Health project

Possible indicators might include:

- An indicator to assess the availability of ambulance transport would be that at least 1 ambulance is available in the community 24/7.
- An indicator for the efficacy of your education program might be ensuring that 100% of decision-makers are aware of the ambulance service and understand why it is important
- An indicator for the subsidy program might be to ensure that ambulances transport is subsidised so that emergency transport costs no more than 50% of the weekly income of each family they attend.

Now you should have a series of small, achievable projects arranged in chronological order by intervention type. By looking from the bottom up, you should now be able to clearly see the short-term goals that need to be completed in order to achieve the long-term goal. As you follow up your theory of change one at a time, you should be on a path to achieving your organisations long-term goal.

Helpful Hint

If your organisation intends to run more than one activity, which we anticipate most would, try to choose short-term interventions that are either from the same outcome pathway or are directly complimentary to one another. This way, you'll be able to focus your activities upon one element of the over-arching problem, likely achieving more noticeable change towards your long-term goal.

Three final things to consider when completing your ToC analysis

1) A ToC is the ideal place to facilitate discussion and critical thinking around both project implementation and evaluation – get your team together and start visualising (use big paper and coloured markers to help the mapping process).
2) Don't be shy, ask other organisations or browse the internet for ideas on what to include and how.
3) Some donors may want to see a specific representation of your ToC, be sure to check their official resources before finalising your approach.

Finishing up

Now that you have identified your interventions and how they will work together to lead to your long-term change, it's time to develop a thorough monitoring and evaluation strategy to make sure your stay on track. We'll be creating this in **Module 7.**

Helpful Hint

Don't forget to consider your inbuilt assumptions and how these may prevent you from thinking outside the box. Evaluate your groups' key assumptions about how change may occur. This will enable you to develop more appropriate strategies.

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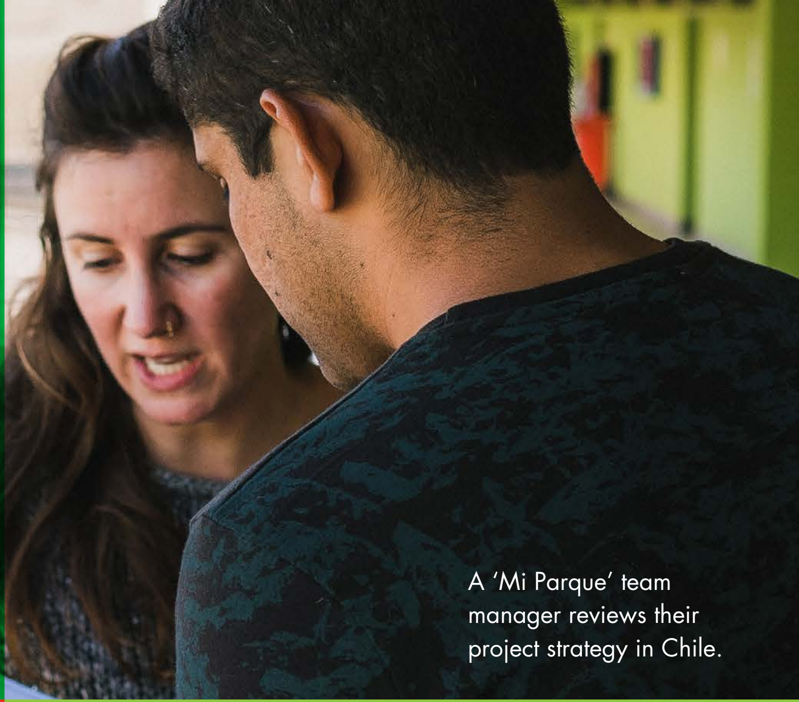

A 'Mi Parque' team manager reviews their project strategy in Chile.

Tools for Effective Project Planning in Community Development

Download Resource

As you complete this module, refer to **'Resource 16: Monitoring and Evaluation Plan Framework'** which can be found on page 117. Use this resource as a template when you are planning your own project.

Monitoring & Evaluation

The terminology Monitoring and Evaluation (M&E) describes a group of activities and indicators to measure a project's ongoing success in relation to clearly defined outputs.

Incorporating them into your design from the beginning allows you to assess progress and achievements in line with your objectives.

M&E offers a tangible way to ensure that your project is accountable, transparent, minimizes collateral damage and actively identifies wasteful processes and poor performance. A good M&E strategy is thus ultimately an assessment of your effectiveness, and as such should be considered an essential facet of your design process.

We will release a full, in-depth course devoted to the topic of M&E shortly which will explore in detail the different methods available to help keep track of your development project. In this module though, we aim to provide an overview of what M&E is, and more specifically, how it can be incorporated into the project design phase.

Monitoring & Evaluation:

describes the collection and assessment of measurable outputs from project activities to gauge success and analyse impact.

- **Monitoring** occurs throughout the project to ensure you are meeting your objectives at various intervals.
- Constant or near-constant monitoring gives you direct insight into activities' impacts.

- **Evaluation** comes at specified intervals, allowing you to reflect upon and analyse the collected data.
- Evaluation by month, quarter or year, provides insight into any changes you may need to make in the coming period.
- A thorough must always evaluation occur after a project is completed.

Why you need M&E

M&E functions as a consolidated source showcasing your progress

- It shows concise evidence of why targets and outcomes are, or are not, being achieved
- It helps your organisation apply for funding and support

M&E enables deeper learning, helping your organisation grow

- It looks into factors that influence your activities, highlighting lessons learned
- It not only lets you record your knowledge, but allows it to inform your future work

M&E highlights the structural and contextual characteristics of your NGO

- It helps highlight the consequences of different strategies of donor agencies, research institutions and your NGO itself

M&E helps support the broader development industry

- Quality data helps your organisation and others analyse how your project may function in other contexts
- M&E may help other communities replicate your project with key contextual changes

Why should you incorporate M&E in the planning stage?

Most planning strategies include setting of targets and deliverables, so it is important to understand how your team will keep track of this information. These are not only targets to assess your success at the end of your project, but also to keep track of your progress whilst you are implementing your project. These real-time assessment targets will help guide any changes you make to your project during implementation, helping to improve the way your deliver your services. Thus, by incorporate M&E into your planning, you are actively preparing for and supporting the implementation process.

Having a robust concept of M&E in place will also contribute to transparency and accountability in your reporting. Not only does this facilitate a culture of learning for the organisation and the wider sector, but it also improves relations with potential donors and supporters.

Creating your M&E plan in 5 easy steps

Whilst there are many more important processes to effective Monitoring and Evaluation, these five key steps are most important during the planning phase. They will be essential to designing your Logical Framework in the next module that will be the centrepiece of your project. You should have an idea of your Monitoring and Evaluation indicators from your Theory of Change Framework in the previous module.

Monitoring & Evaluation during project planning

STEP 1
IDENTIFY PROGRAM GOALS AND OBJECTIVES

STEP 2
DEFINE INDICATORS

STEP 3
DEFINE DATA VERIFICATION METHODS AND TIMELINE

STEP 4
IDENTIFY M&E ROLES AND RESPONSIBILITIES

STEP 5
CREATE A M&E PLAN FRAMEWORK

Step 1 Identify program goals and objectives

Before moving on, you should ensure that you have set clear and realistic goals and objectives for your project. Through your Theory of Change Analysis in the previous module, you should have chosen specific interventions to achieve these goals. You can also look at **Module 3** for Goal Setting and **Module 5** for Solution Analysis to help you identify clear objectives.

Step 2 Define indicators

Indicators are used to assess the success of your project. They are normally accompanied by a measurable target - often a percentage - to help quantify success.

There are different types of indicators you can use:

Objectively Verifiable Indicators = quantifiable targets that usually assess quantity, quality or time (the best way to assess the success of your project)

- Targets should be specific, usable, measurable and sensitive.

  Example: Provide 90% of pregnant women living in the Ecuadorian village of Canoa an antenatal care service at 10weeks, 20weeks and 30weeks gestation between 01/01/18 and 01/07/18

Indirect Indicators = assess the achievement of a target in an indirect way

- These are indicators you can use if the outcome cannot be measured directly

  Example: Measuring the happiness of a work force is difficult. An indirect indicator of workplace happiness might be tracking the number of sick days taken by staff members.

Qualitative Indicators = an important indicator when seeking to understand how the 'process' of your project is being received by the community.

- Give insight into how satisfied beneficiaries are with your project, whether the project has led to sustainable behavioural changes
- Can be hard to analyse   you can still use Objectively Verifiable Indicators (usually a percentage) even if your indicators are qualitative.

  Example: 50% of families reported feeling less stressed about their finances.

Helpful Hint

The SMARTER AND SPICED acronyms can be useful when trying to identify all of the possible indicators our project can use. These work for both quantitative and qualitative indicators.

SMARTER = Specific, Measurable, Achievable, Realistic, Time bound, Enjoyable, Rewarding

SPICED = Subjective, Participatory, Indirect, Cross-checked, Empowering, Diverse)

Step 3 Define data verification methods and timeline

Next, you need to identify methods of verification to measure your indicators and assess your performance. Then you define a timeline that sets concrete time periods for when you will conduct data collection for your assessment.

There are different types of indicators you can use:

- Use methods of verification that are cost-effective and readily available

  Example: Instead of visiting each beneficiary of your project individually to conduct a survey, better do the survey at a workshop with a group of beneficiaries at once or hand out survey papers that can be completed and returned at the next meeting.

- Use methods of verification that are already available in your community

  Example: Instead of visiting each beneficiary of your project individually to conduct a survey, better do the survey at a workshop with a group of beneficiaries at once or hand out survey papers that can be completed and returned at the next meeting.

- Collect data at multiple times throughout your project

  This will help you track the success of your project, see which interventions had the best (or worst) effect and make changes to your project during the intervention period.

- Incorporate baseline measurements into your work (depending on what you are evaluating)

  This means collecting data before your intervention starts (at the very beginning of your timeline!). This is important because without it, the data you capture throughout the project will not bear as much relevance, as you will not see the process you are making.

Helpful Hint

If your organisation intends to run more than one activity, which we anticipate most would, try to choose short-term interventions that are either from the same outcome pathway or are directly complimentary to one another. This way, you'll be able to focus your activities upon one element of the over-arching problem, likely achieving more noticeable change towards your long-term goal.

Step 4 Identify M&E roles and responsibilities

To ensure that your M&E strategy progresses smoothly, it is important to assign specific responsibilities to specific members of your team.

When assigning responsibilities, make sure that:

You are as specific as possible

- Use names, dates, times and places where data collection will take place.

You cross check data through more than one person

- Mistakes must be identified and verified quickly and unexpected consequences must be acted upon immediately.

You choose an appropriately skilled team member to collect the data

- Holding a workshop requires some experience and 1on1 interviews can be daunting for newer team members.

Step 5 Create a Monitoring and Evaluation Plan

Now it's time to put all this information together into a succinct **Monitoring and Evaluation Plan**. This should be done for each specific objective separately. An example can be seen below:

Example: Monitoring & Evaluation Plan for a Health and Hygiene Program in Ethiopia	
Desired Initiative	Providing hygiene classes and soap at school to reduce incidence of Cholera amongst children in a rural town of Ethiopia.
Performance Indicators	Number of children attending the local doctor for Cholera related symptoms falling by >70% after 12 months and a decrease in severity of cholera related conditions.
Definition and Unit of Measurement	Counting number of children presenting to local GP with Cholera related symptoms and the severity of their condition.
Data Source	De-identified report from local Doctor.
Method or Tool	Simple rolling counter to monitor number of patients and a clearly defined 1-10 scale of severity to be completed for each patient, completed by local doctor for each patient presentation.
Frequency of Collection or Reporting	Data collection will be ongoing. A member of our team will collect reports monthly.
Use of Information	Tracking success of providing hygiene education programs and soap over a one-year period.
Team Member Responsible for Collection	Project Team Leader Tom Akmar will visit the doctor's office on the first Monday of every month. This will be verified by Katharina after Tom has analysed data.

Finishing up

With the guide above, you should have a clearer idea about how you can plan to track and assess the efficacy of your project. In the next module, **Module 8**, we'll put all this information together into a logical framework to guide your entire project in the intervention process

Helpful Hint

Often you will need more than one method of monitoring. Not all parents might take their children to the doctor. So, while the monitoring strategy outlined above is 100% accurate because a doctor has diagnosed cholera, it might not capture 100% of children who are suffering cholera. As such, a complimentary monitoring strategy could be to count the number of children sick from school to help get a broader picture of the total impact of your project.

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A 'CEPRODIH' beneficiary at their local workshop, Uruguay.

Tools for Effective Project Planning in Community Development

Synthesizing project design using a LogFrame

The Logical Framework Approach (LFA) is a systematic planning method used to bring together all of the project planning information you have gathered (in previous modules) into a single 'master framework'.

In the last four decades the LFA has become an increasingly popular tool in international development, so much so that it is now required by nearly all government and private donors around the globe as an indicator of quality project design. The LFA allows a project team to work through decisions when synthesizing a project, producing a matrix that clearly identifies each element of the implementation strategy, as well as the project's desired outcomes and specific indicators for monitoring and evaluation.

Download Resources

As you complete this module, refer to **'Resource 17 – Logical Framework Analysis'** which can be found on page 118. Use these resource as a template when you are working to complete your own LogFrame.

What is a Logical Framework?

A LogFrame is a 4x4 matrix that provides a concise and strategic summary of a project's goals, activities, assumptions, indicators, and sources of verification in order to measure and report the achievement of objectives.

Before looking at the LogFrame, read or review the previous modules to make sure you have all the necessary information. You will need to be aware of the following:

A checklist before synthesizing your LogFrame

- ✓ Know your **Donor's Requirements**: A donor will sometimes have explicit requirements for a LogFrame, make sure you know what they are and stick to them.
- ✓ Conduct a **Situational Analysis**: This will allow you to better understand your context and incorporate risk assumption and management. See Module 2 for more details about Situational Analysis.
- ✓ **Analyse the problem**: This can be done by working through a Problem or Solution Tree Analysis, and will help you better understand the causes and effect of the problem you are working to resolve. See Module 3 for details on Problems/ Solution/ Objective Trees.
- ✓ Know your who your **Stakeholders** are and how you are going to involve them in the project. See Module 4 for more details about a Stakeholder Analysis
- ✓ Know your **Chosen Interventions** and understand the **Theory of Change** that will ensure that these interventions will lead to the development your organisation seeks. See Module 5 for more details about choosing an intervention and Module 6 for information about conducting Theory of Change analysis.
- ✓ Have identified the **verifiable indicators** and **Monitoring & Evaluation** strategies that you intend to use to track the success of your project outputs. See Module 7 for more information about Monitoring and Evaluation.

Helpful Hint

Remember to Involve the entire project team when putting together your Logical Framework: this allows for a wide range of expertise that can more specifically reflect and support the objectives of the project and ensure that nothing is missed.

Creating your own LogFrame

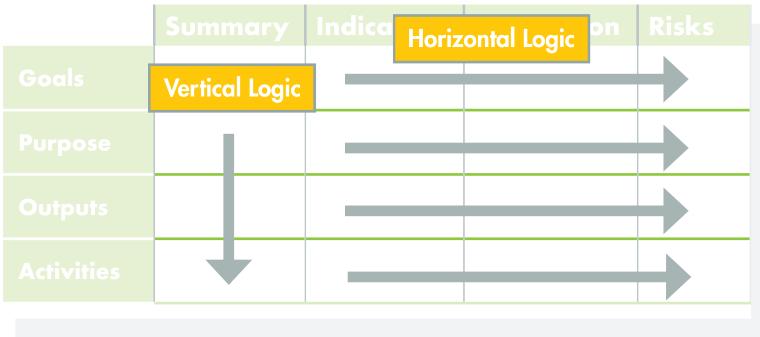
With the help of a Guide and Example LogFrame, we will show you step-by-step how to develop your own LogFrame. Please be intimidated - as the name suggests, the process is Logical. However, it does require some time and patience to complete correctly. Remember, the language around the various sections of the framework may change based on your donor's preferences/requirements, but the structure (and logic) remains the same.

This Guide highlights the different pieces of information that should be placed in each section of your LogFrame table. On the next page, we'll explore the exact steps in more detail.

	Horizontal Logical Summary	Indicators	Verification	Risks and Assumptions
Long-Term Goals	What is the overarching long-term goal that your project seeks to contribute to? **Hint: You identified this in Module 2**	What are the broad quantitative measures or qualitative judgements that will be used to assess whether the long-term goal has been achieved?	What broad, existing sources of information will you use and how will you evaluate this in order to measure success?	What are the broad factors, external to your organisation and your project, that are necessary to reach your long-term goal?
Purpose	What is the specific effect (purpose) of your project and how will this contribute to achieving this long-term goal? **Hint: These will closely resemble your mid-term goals from your Theory of Change in Module 6**	What are the quantitative measures or qualitative judgements that will be used to assess whether your specific projects purpose has been achieved? **Hint: You identified these in Module 7**	What sources of information will you use and how will you evaluate it in order measure the success of your specific project? **Hint: You identified these in Module 7**	What are the local factors external to your organisation that are necessary to ensure that your project contributes to the achievement of your long-term goal?
Outputs	What are the immediate deliverables (outputs) that will be used to achieve your project`s purpose? **Hint: These will closely resemble your short-term goals from your Theory of Change in Module 6**	What are the measurable targets that will be used to assess whether the immediate outputs of your project have been achieved? **Hint: You identified these in Module 7**	What sources of information will you use to monitor and evaluate the success of your project`s immediate outputs? **Hint: You identified these in Module 7**	What factors beyond your control could affect or restrict the ability of your outputs to achieve your project`s purpose? **Hint: Consider using the SWOT, 5C and SCOPE Analysis from Module 2**
Activities	What activities will you undertake in order to achieve your desired outputs? **Hint: You identified these in Module 5**	What are the targets that will be used to assess whether your activities have been successful? **Hint: You identified these in Module 7**	What sources of information will you use to monitor and evaluate the success (in real time) of your activities? **Hint: You identified these in Module 7**	What factors beyond your control could affect or restrict the ability of your activities to produce your desired outputs? **Hint: Consider using the SWOT, 5C and SCOPE Analysis from Module 2**

A two-step process: Vertical & Horizontal

There are two distinct steps to completing a LogFrame analysis. The vertical process, which is completed first, represents the core elements that make up your program. The horizontal process provides more detail about how these core elements will be monitored, evaluated and managed by your team. We will explore these two separate processes individually in the section below.



Vertical Logic

The first, and most important, section of your framework is the 'vertical logic' or means-end relationships. This is used to highlight the means (outputs and activities) that will lead to your ends (goal and purpose). Outline the hierarchy of activities by following these steps:

1. **Define the over-arching goal that your project will help to achieve.**
   - This is the long-term impact of your project that you identified in Module 2 and refined in Module 3 and Module 6.
   - Remember, your project purpose (identified in the next step) will usually only represent one small step towards achieving this goal
2. **Define your project's purpose. These are the medium-term benefits to beneficiaries of your activities.**
   - What are the intended or desired effects of your project specifically? These will be closely related to the medium-term goals you identified in your Theory of Change framework from Module 6.
   - Who will benefit from these projects?
   - What improvements or changes will the program or project bring about?
3. **Identify the (desirable) outputs required to achieve your identified purpose.**
   - These are the immediate effects of your activities. These will be closely related to the short-term goals identified in your Theory of Change framework from Module 6.
   - What are the specific, deliverable outputs your project seeks to achieve in the community?
4. **Outline the activities needed to achieve each output.**
   - What are the specific initiatives that your organisation is planning to undertake in the community?

Helpful Hint

Most organisations prefer to work top-down, starting with goals and then working down to initiatives as outlined above. However, if you have already begun your project and your activities are already fixed, you may want to try building your LogFrame from bottom-up. This is why a team approach can be helpful in developing your LogFrame, as knowing where you have flexibility in design will allow you to complete the framework more efficiently.

Horizontal Logic

Once you've broken the project down into levels from goals to activities (or vice-versa) you will then be able to input the measurable indicators you will use to identify success, the means of verification you will use to monitor these indicators and the risks and assumptions that might impact upon your project's success. This is considered the project's 'horizontal logic'.

1. **Outline specific indicators for all tiers, refining the results by detailing how you will know that the goal, purpose, outputs and activities have been achieved.**
   - You should have a good idea of what these indicators will be from the Monitoring and Evaluation Analysis Plan that you built in Module 7.
   - Indicators should be a mix of quantitative and qualitative objectively verifiable indicators which generally incorporate measurable targets.

   EXAMPLE: Provide 90% of pregnant women living in the Ecuadorian village of Canoa an antenatal care service at 10weeks, 20weeks and 30weeks gestation between 01/01/18 and 01/07/18

2. **Input the means of verification. Here, you need to identify methods to measure your indicators and assess your performance.**
   - As with your measurable indicators, you should also be able to use the means of verification you identified in Module 7 for this step.
   - These should also have been identified during your Monitoring and Evaluation Analysis Plan.
   - To make this process easier, it is often helpful to draw upon methods of verification that are already available within the community.

   EXAMPLE: To verify whether a hygiene education project is leading to decreased instances of cholera in a rural community, ask the local doctor to provide a de-identified list of the number of patients presenting with cholera related symptoms over the time periods before, during and after your project.

Step 3 of the Horizontal Logic process can be found on the following page.

Horizontal Logic

Continued

3. Specify the assumptions and risks to your project within each level to provide additional context and support to your project summaries.

- This process is important in order to prepare for, and help mitigate, any of the risks that might sabotage your project`s success. You will have identified some of these during your Situational Analysis in Module 2. Possible areas for assumptions and risks could be:
  - The internal weaknesses of your organisation that relate to your project`s success.
  - Use the SWAT or SCOPE tool from Module 2 to identify internal risks and assumptions.
  - he external infrastructure or environmental factors that relate to your project`s success.
  - Use the PESTLE tool from Module 4 tool to identify external risks and assumptions.

EXAMPLE: For a project providing irrigation systems to help boost local food production, an assumption might be that enough water will be available for your new technology to be used.

EXAMPLE: Given your organisation's limited resources, providing 90% of local women with antenatal care in the Ecuadorian village of Canoa might rely upon the assumption that the population of local women doesn't increase or that pregnancy rates stay constant.

EXAMPLE: A possible risk for a women's self defence initiative might be that men might prevent their wives from attending workshops due to engrained cultural gender norms.

- The purpose here is not to simply identify risks and assumptions, but to begin thinking about strategies you can build into your project to prevent them from affecting your work.

EXAMPLE: To mitigate the risk of an irrigation system breaking down and failing to positively impact farmers, your organisation could incorporate an activity that provides a series of workshops for local farmers to learn how to repair the equipment.

- Some risks will be impossible to mitigate, especially entrenched social, cultural and political risks. This shouldn't stop you undertaking your project, but it is important to be aware that these risks exist.

Example: Improved cooking technology in rural Peru

On the following pages, you will find a completed example LogFrame for a local community development project in Talma, rural Peru. You can use this, along with the guide on page 69, to help complete your own LogFrame.

Helpful Hint

It is absolutely essential during this stage to consult ALL members of your project team so that all of the risks and assumptions can be accounted for.

eg:

	Horizontal Logical Summary	Indicators	Verification	Risks and Assumptions
Long-Term Goals	To improve the social and physical well-being of households in the rural village of Talma, Peru	Increase in the time for community member to partake in social activities. Decrease in the number of chronic health conditions within community	Participatory monitoring within the community Feedback from local healthcare providers	Assume that community members will use increased free time for recreational or social productive activities, Assume that other factors contributing to chronic health conditions will remain constant
Purpose	Local community members are healthier, have more time for recreational activities and are happier because they have improved cook-stoves	90% of households provided with cook-stoves will utilize them, 75% of community members will use increased time to partake in activities that make them happy, 50% reduction in chronic respiratory conditions within the community	Interview and participatory monitoring within the community, Anonymous medical records provided by local healthcare providers	Assume that community members will recognize the value in improved cook stoves, Assume that households will use the cooks-stoves correctly, Assume that community members visit local healthcare providers
Outputs	1. Provide and install improved cook-stoves that require less fuel (less time to collect wood), cook faster (less time cooking and produce less smoke (reducing health side effects). 2. Ensure community members understand how to use and maintain new cook stoves	95% of households are provided with new cook-stove within 3 months 80% of cook-stoves are still operational and being used after 12 months	Cook-stove distribution records Records of attendance at workshops 12-month evaluation including visitation of households	Assume that cook-stove can be safely installed in all types of home, Risk that community members who attend training may forget how to fix cook-stoves after prolonged period
Activities	1.1 Secure cook-stoves from supplier with available funds 1.2 Engage with local community members and promote new cook-stove 1.3 Negotiate time to deliver and install cook stove within each household 1.4 Deliver and install cook-stove to households 2.1 Establish relationship with local womens group 2.2 Promote training workshops to local women who, due to local norms, will be primary users and maintainers of new cook-stove 2.3 Provide workshop explaining use and maintenance of cook-stoves 2.4 Provide brief overview of workshop content when stoves are installed	1. 100% of community members are made aware of free, new cook-stove 1. 95% of households have agree to allow installers into home 2. 95% of households have at least one family member that attends training and feels confident using and maintaining cook-stoves 2. 95% of attendees at workshop report feeling confident that they can operate and repair cookstove after session	1. Participatory monitoring and interviews within the community 1. Cook-stove distribution records 2. Records of attendance at workshops 2. Brief survey at the conclusion of workshops	Assume that existing contract with supplier will be honoured at agreed price Assume that community members will have or make time to attend workshops Risk that environmental or geographic hazards might prevent installers from visiting 100% of homes in the community Assume that 100% of workshop attendees will understand the language in which the workshop is delivered Assume that women are permitted to attend workshops given local gender norms

Finishing up

Having worked through the steps above, your LogFrame should now show the logic of your project approach. The use of "If-Then" statements allows you to work through your plan from the bottom up. For example, "If this activity occurs (indicator) and related assumptions hold true then this output should be achieved." This can be done at every level, linking up to the next level to highlight the reasoning of your planning.

Now that you have completed the master framework of your project, it's time to conduct a gender analysis in **Module 9**, our final module of the course, to ensure that your project supports all vulnerable groups in the community.

Helpful Hint

For more in-depth guides, you may want to look at the resources provided by the specific donor you are working with, or the resources cited in this post, which supply comprehensive guides and examples for LogFrame development.

This handbook was produced by Grassroots Collective.

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A 'Life and Hope Association' beneficiary rides to school in Siem Reap, Cambodia.

HANDBOOK 1

MODULE 9

Tools for Effective Project Planning in Community Development

Download Resources

As you complete this module, refer to **'Resource 18 – Gender Analysis Framework'** which can be found on page 120. Use this resource as a template when you are completing your own gender analysis.

Gender Analysis for Project Planning

A Gender Analysis is a development tool that allows you to identify how gendered relationships within your community will interact with your project. Gendered power relationships exist in all communities. Thus, nearly every development project will require this type of analysis.

Whilst it might not seem obvious, performing a Gender Analysis is essential for everyone.

This module provides an overview of gender issues that are specifically related to project design and thus will help your team understand gender relationships within your community and how these may affect your project.

In the future, we'll be producing an entire course about incorporating better gender practices into your project design, implementation and monitoring.

A Gender Analysis allows you to:

- Explore existing gender roles and relationships within the community
- See how gender relationships will impact upon your project
- Assess the different needs, capacities and contributions of women, men, boys and girls
- Understand how your project will be perceived by different local gender sub-groups

Steps to completing your Gender Analysis

To provide you with the basic insights you need when designing your project, we'll take you through a simple 4-step process of gender analysis, including the use of the 'Gender Analysis Matrix' framework.

Step 1
Explore the gender context

Step 2
Collect relevant data

Step 3
Gender analysis matrix

Step 4
Make practical changes

Helpful Hint

A Gender Analysis is about exploring power in the relationships within a community. Whilst this normally manifests in differences between men and women, it is important to consider subgroups within genders. This will show the way your project will impact men and women of different ages, class, caste and ethnicity.

Example: Younger and older women may have very different ideas about the value of ante-natal care. This is important because if you are running a project to promote ante-natal care services, these two sub-groups will require very different strategies to get them involved in your services.

Step 1
Gender Context

Creating a gender context worksheet

In this worksheet you write down the gender roles and responsibilities within the community and then ask key questions to summarise the gender roles and relationships within your community. This document doesn't have to be directly relevant to your project (this comes in step 2), it's meant to be a more general, transferable summary of the community context.

Aim: To create a (maximum) 2-page worksheet that succinctly summarises the gender roles and relationships within your community.

Keep in Mind: To try and find evidence to support your team's assumptions, referring to information online or in the local media.

Keep in Mind: To have a group creating your worksheet that is made up of both men and women, ideally of varying ages and ethnicities within the community.

Remember: To always be open, considerate and patient – discussing gender, even amongst socially-conscious development professionals, can often be a confrontational subject.

Questions to help you complete your worksheet

Assessing existing gender roles and relationships in your community:
What are the traditional and current roles, responsibilities and practices that women, men, girls and boys are supposed to adhere to, particularly in the household?
How have things changed in recent times? Why has this changed?
Are there any broad restrictions placed upon certain people or groups within your community, especially for women, girls and vulnerable people? (eg. their ability to leave the home or perform certain activities alone)
How does age affect gender roles and responsibilities?
What do you know about decision-making and the control of assets and resources at a household level?

Identifying how different gender groups interact in the community and if any related legal policies exist:
How do women and men participate in national, local and community level decision-making?
Can women participate equally in local and community-level decision-making? Think about what context this takes place in, the roles they tend to play and the challenges they often face.
What is the role of women's groups and organisations in this context?
Are there any government policies that are important to understanding gender equality in your community?
How are these gender equality laws implemented, or not implemented in practice?

Identifying education and economic empowerment of different gender groups:
What do you know about women's, men's, girls' and boys' literacy rates and access to primary, secondary and tertiary education? Are there any major differences between genders, for example, are there high illiteracy rates for older women, older men, younger women and younger men?
How do women and men generally earn an income?
What are the key issues on division of labour, for example, what types of work do women, men, boys and girls undertake and how does this affect them differently?

Step 2
Collect data

Collect data specifically relevant to your project

Next, it`s time to begin assessing gender roles specifically related to your project and proposed activities. To do this, you will need to collect data directly from the community.

Aim: To obtain data relevant to how your specific project will interact with existing gender relationships within the community.

Remember: To collect data directly from your stakeholders. Do not try to guess how your project might be valued, understood or engaged with by different gender sub-groups. You aren't expected to know or understand complex gender relationships without some research.

Keep in Mind: To try and collect information from your community from both individuals and groups, using standardised questionnaires or personal interviews. We have included two useful tools for data collection below.

Make Sure: To think carefully about who you approach for this information and how you intend to collect it. If your project involves challenging existing gender norms, you need to be sensitive from the very first interaction with community members.

Some important questions to begin with:
Who are the specific gender groups or sub-groups (young/old/married) who will be directly involved or affected by your project?
What are their current roles and responsibilities within the community related to the development process you are seeking to change?
How will these change during and after your project?
Will anybody suffer or feel worse off during or after your project?
Is your project challenging any existing gender norms within the community? In what way?

Useful tools for collecting data relevant to gender roles and responsibilities

These tools are designed to help you see the world through the eyes of different gender groups and understand how your project(s) will affect their world. These tools can be used in workshops, small groups or individual interviews. It's best to use the same tool with multiple different sub-groups (gender, age, caste, class) to help you get a clear idea of which resources are important to which groups.

Needs Analysis

How it works:

Members of your community are asked to identify the reasons why they need or desire different elements of your proposed project, and then rank them according to importance.

- You should end up with a ranked list of different factors relevant to outcomes of your project. This will help you see what elements of your project different groups consider most valuable.

Example: Solar cooking technology

An initiative to replace indoor wood-fired stoves with solar cookers would likely produce a very different needs analysis for different community groups. Women might think that the most important 'need' for this project would be to free up time for them that they would normally spend collecting firewood (an activity that women generally perform in many communities). Men however, might consider the most important 'need' for the project is reducing the smoke in their home (generally the only interaction they have with the cooking process)

Helpful Hint

These tools will be explored in more detail in our **'Facilitating Community Workshops Course'** that will be published in the near future.

Community Mapping

How it works:

Community members geographically map out (using pen and paper) the existing processes related to your project. This should include physical facilities and where other participants in the process from their community can be found.

- This allows community members to identify important areas or resources for them related to the project. It also, more importantly, allows you to identify disparities between sub-groups, i.e. who controls what resources and who is responsible for different resources in the given process. This will help you see which elements of your project will affect different stakeholder groups.

Example: Water wells and antenatal care

Example 1: For a water well project, you might ask participants to map out where they currently retrieve water, who retrieves water, who they retrieve it with, who/where they buy buckets to carry the water and where they store the water.

Example 2: For a project seeking to improve the delivery of antenatal care services in a community, young women might map out the local doctor as an important facility relevant to their maternal healthcare. Older women however might highlight a traditional healer as key to providing maternal care services because that's how they did it and they have a suspicion of modern doctors (remember it's important to look at differences of age within gender groups).

Step 3
Analysis Matrix

Analyse data using a 'Gender Analysis Matrix'

S

	Analysis Category #1	Analysis Category #2	Analysis Category #3	Analysis Category #4
StakeHolder Group #1				
StakeHolder Group #2				
StakeHolder Group #3				
StakeHolder Group #4				

A) Identifying 'Categories of Analysis'

You should have a good idea about what these categories are from step 2 where you identified the **key processes involved in the development problem** your project is trying to solve, who performs them and how your project might change them. Ensure that the categories you choose are specific to your development project.

eg:

Example: If you build a water-well in town, a key output will be that women will have more time to spend on other activities. This is because in step 2, you would have identified that women are responsible for the process of collecting water from the river 4km away. If you build a water-well, they now won't have to complete this process anymore, meaning they will have more time. A key category of analysis for this project is therefore Time, as this is how changing the process of collecting water will affect the key stakeholders, women.

Some Categories of Analysis that are generally applicable to all projects

Labour

This refers to changes in tasks, the level of skill required to achieve this task and the amount of people required to do it.

Time

This refers to changes in the amount of time (3 hours, 4 days, and so on) it takes to carry out the task associated with the project or activity.

Resources

This refers to the changes in access to capital (land, income) as a consequence of the project, and how control over this capital might change after your project is completed.

Culture

Cultural factors refer to changes in social aspects of the participants' lives (changes in gender roles or status) as a result of the project.

B) Identifying 'Key Stakeholder Groups'

These should have been identified in your **Stakeholder Analysis in Module 4.** Make sure you add in the specific factors relevant to a Gender Analysis if they weren't previously identified in your stakeholder analysis – gender, age, caste and class.

Example: For a project promoting women's access to income, you might need to split young women stakeholders into two separate stakeholder groups, 'young women with children' and 'young women without children'.

Helpful Hint

Whilst they might not be specific stakeholders in your project, including 'household' and 'community' as stakeholder groups is often useful. These are generally the 'contexts' where gender relationships play out, so exploring how these 'units' might view your project can be useful.

C) Filling in your Analysis

Once you have identified your categories and stakeholders, it is time to perform the analysis.

- In each box, you need to identify the ways the stakeholder will perceive the change your project will result in, related to that category (+ or -).
    - Use the evidence you acquired in step 1 and 2 to decide whether the stakeholder will likely view the change as positive or negative.
    - It's ok to put a "?" in a place where you aren't sure (but perhaps these are questions you should go back and ask the community in step 2).
- Add some details justifying why each group of stakeholders will view the change positively or negatively. This will help guide any practical recommendations your gender matrix can produce.

eg: Example: Gender analysis matrix for rural Ecuadorian development project where fresh water is piped to homes.

	Labour	Time	Resources	Culture
Women	+ No longer need to transport water	+ Saves time + Options for leisure or work	+ Water is easily available for garden and cooking	- Reduction of mobility - Social interaction during water collection ends
Men	+ Acquire skills in water system building and maintenance	? Training, building and maintenance takes time away from other activities	+ Better health + More water + Easy access for farming	-? Uneasy about women having more free time
Household	+ Net savings and increase in paid labour	+ Women have more time for child care and other home based activities	+ Better health + More water	? Women more at home
Community	+ Trained community committee for water system maintenance	? Less time for men, more time for women. Leisure? Work opportunity?	+ More water easily available for variety of uses	- Women may interact less with each other

If done correctly, your Gender Analysis Matrix should clearly show the following key points:

- **How different gender groups will understand the value of your project**
- **How different groups should be involved in your project**
- **Whether some groups might view your project as challenging or disruptive of existing gender norms**

Step 4
Make Changes

Make practical recommendations for your project

Finally, now that you have an understanding of how different groups will view your project, it is time to start thinking about how you can use this information to make practical recommendations for your project. This involves two distinct processes to identify and mitigate your 'gender risks'.

Identifying your 'gender risks'

The first step to creating practical recommendations is assessing the risks to your project. It's important that you can identify:

- Who are the most vulnerable gender groups in your project and how can you ensure that they are involved and empowered throughout our initiative?
- How will you ensure that your project meets the needs of all gender groups involved in the project?
- How can you account for the power relationships these specific stakeholder groups have with each other? Do you need to get permission from certain gender groups to access another? Do different groups need different supports or are ways of accessing supports dependent upon the power in the relationship they have.
- How will you navigate any perceptions that your project might be challenging existing gender norms?

Mitigating your 'gender risks'

Once you've identified the risks, the final step is to create strategies that will guide how you will manage different gender groups throughout your activities.

Focus certain activities towards different gender groups.

Example: For a fresh water-well project, activities for women might include a hygiene workshop so that they can better protect their children's health because this is how they see the project as valuable. However, for men, activities could include training to help maintain piping to their crop fields, because better irrigation is how they perceive the value of the project.

Find the right location for certain activities to ensure the targeted gender groups feel most comfortable.

Example: If you are promoting contraception to young women, it is essential to ensure that sensitive topics like this are discussed in a safe and private space.

More mitigating strategies:

Use different approaches to communicate with different groups during project implementation.

Example: If you plan to contact beneficiaries by phone in a community where gender roles dictate that men are generally in control of the family-phone, some women might not have access to the information you put out. You might need to consider other means of communication to ensure the most vulnerable gender groups have access to your project.

Put in place mechanisms to make sure all gender groups have access to the resources required for your project.

Example: If women don't have access to money for a bus ticket into town where you are holding a workshop, you might look at subsidising bus tickets or find ways to encourage husbands to bring their wives.

If there is a risk that gendered power relationships may affect the efficacy of the project if both gender groups are present for certain activities, consider undertaking these activities separately.

Example: If you are promoting ante-natal care for young women in a rural community it might seem obvious to hold workshops promoting its value to young women. However, if antenatal care must be paid for by the family, promoting its efficacy (and cost effectiveness) to their husbands specifically is likely to be just as important to the uptake of these services.

Making small changes to the way you plan to implement your project can make a huge difference to your success. Viewing your project through the lens of gender roles and relationships within your community will ensure that your project is helping to support everybody.

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Resource 1 Checklist for Effective Project Planning in Community Development

Use this checklist as a guide to completing the steps required to plan a successful community development project.

Step	Aim	Tools	Where to look	Check it Off
Step 1	Identify the context, broad project goals and important relationships	Situational Analysis	Module 2 Resources 2, 3, 4 and 5	
Step 2	Understand the problem, identify objectives and create clear goals	Problem Tree	Module 3 Resources 6, 7, and 8	
		Objective Tree		
		Alternative Analysis		
Step 3	Find out who will be impacted by your project, how they are involved and how they might influence the project's success	Stakeholder Analysis	Module 4 Resources 9, 10, 11, and 12	
Step 4	Compare different intervention strategies relating to feasibility criteria and decide upon a specific initiative	Solution Analysis	Module 5 Resources 13, 14	
Step 5	Identify the specific activities and outputs that will help you achieve long-term change	Theory of Change	Module 6 Resource 15	
Step 6	Establish a group of activities and indicators to measure your project's ongoing success	Monitoring & Evaluation Analysis Plan	Module 7 Resource 16	
Step 7	Combine the elements of your project design into a single framework	Logical Framework	Module 8 Resource 17	
Step 8	Understand the gender context, analyse gender dynamics and explore how these will affect your project	Gender Analysis	Module 9 Resource 18	

Resource 2 Checklist for Situational Analysis

The following series of checklists will help you complete a Situational Analysis. Use them to establish the broad context of your community, identify your organisation's capacity and reassess the context in reference to your problem.

Step 1 - Understanding the general context of your community

Population Profile	How many people are in the community?	
	What is the age distribution of these people?	0-5yrs = ... % 6-15yrs = ... % 15-60yrs = ... % Over 60yrs = ... %
	What is the (estimated) percentage of men and women?	Males = ... % Females = ... %
	What ethnic groups are represented in the community? What is their distribution (as an estimated percentage)? Do people in the community tend to seperate based upon ethnicity, or do they assimilate well?	.... = ... % .... = ... % .... = ... % Notes:
	What languages do people in your community speak? What is their distribution (as an estimated percentage)? Generally, how well can people from different language groups communicate together? Is there a predominant shared language?	.... =...................................... % .... = ... % .... = ... % Notes:

Resource 2 Checklist for Situational Analysis

Education Profile	What percentage of community members graduate primary school?	= .... %
	What percentage of community members graduate secondary school?	= .... %
	What percentage of community members graduate university?	= .... %
	What percentage of community members have skilled employment?	= .... %

Economic Profile	What percentage of the population have access to housing?	= .... %
	What percentage of the population have stable access to food?	= .... %
	What kind of jobs do people have in your community? For example: Manufacturing, agriculture, hospitality etc.	
	What are the key areas of economic growth in your community?	

Resource 2 Checklist for Situational Analysis

Environmental Profile	What type of environment is your community located in? For example: Tropical, dry, jungle, city etc	
	How big is the geographical area covered by your community?	
	How easy is it to access different areas of your community?	
	How far away is the closest hospital/secondary school/major metropolitan area? How easy are they to travel to?	

Cultural Profile	What are the major cultural values of the community?	
	Are there any major cultural conflicts between different sectors of the community?	
	Are there distinct gender roles within your community? Do cultural norms marginalise women from certain jobs and activities?	

Resource 2 Checklist for Situational Analysis

Political Profile	What are the current major political issues?	
	What are the political priorities of the current government?	
	How is the government viewed within the community?	
	How well do local government representatives function and work together with national government, law enforcement and other public departments?	

Step 2 - Identify challenges within the community

Try to be as broad as possible when identifying challenges. Your aim is to identify the over-arching problems your community faces.

When identifying the major challenges within your community, asking the following questions is helpful:

- How severe is it?
- What are some of the broad causes?
- What are the broad groups of people who are affected by this problem?

Step 3 - Assess your organisations capacity

Staff: Qualifications and experiences	How many people work for your organisation?	
	What is the technical experience and qualification of each staff member?	
	Has your organisation undertaken any previous development projects? • What type of projects were these? • What types of specific interventions did you provide?	

Resource 2 Checklist for Situational Analysis

Relationships: Organisations, businesses and government bodies	Does your organisation have existing relationships with the community from previous projects? Which broad areas of the community do you have existing relationships with? For example: children, women, farmers, manufacturers.	
	What external businesses, organisations or government bodies does your organisation have existing relationships with? • Could you draw upon these relationships for certain types of projects?	

Obstacles and insufficiencies	What are the major obstacles or insufficiencies of your organisation and your staff members?	

Step 4 - Choose a broad project goal

Choose the broad project goal for an identified problem that allows you to maximise the strengths of your organisation.

Example: "Improving education levels within the community" or "Improving access to fresh water in the community"

- Here is a space to brainstorm:

Step 5 - Reassess the context in reference to your problem

In the final step of your Situational Analysis the aim is to generate as much information about your community as possible in reference to the specific problem you identified.

Use **SWOT (Resource 3)**, **5C (Resource 4)** and **SCOPE (Resource 5) Analysis** to identify the right questions to ask. Also consider using the **PESTLE-Tool (Resource 9)** to ensure that you have explored every element of your community context.

Your Problem:	Your specific questions:	Your responses:
	1:	
	2:	
	3:	

Resource 2 Checklist for Situational Analysis

Your Problem:	Your specific questions:	Your responses:
	4:	
	5:	
	6:	
	7:	

Resource 3 SWOT Analysis

A SWOT Analysis is used to help you identify the best type of project for your organisation by outlining and comparing your internal capacities and your external environment. SWOT stands for:

- **Strengths:** Areas you do well or advantages of your organisation
- **Weaknesses:** Areas where your organisation needs to improve
- **Opportunities:** Factors external to your organisation that may contribute to your project's success or amplify your organisation's strengths
- **Threats:** Factors external to your organisation that may cause problems or present risks to your project

STRENGTHS

- 1.

OPPORTUNITIES

- 1.

Your organisations name:

WEAKNESSES

- 1.

THREATS

- 1.

Resource 4 5C Analysis

Use a 5C Analysis to examine how the internal capacities of your organisation and the external factors of your environment could affect your project.

Company (NGO) | Customers (Beneficiaries) | Competitors | Collaborators | Climate

The 5C's	Your response:
Company (NGO): Your organisation's vision, strategies, objectives, capabilities, technology, and culture	
Customers (Beneficiaries): Your target audience: their behaviour, their number/ size, what support they need, how they consume support, their preferred methods of accepting support	
Competitors: The environment in which the organisation operates; your positioning, market share; upcoming initiatives of other NGO, government programs related to your cause	
Collaborators: Agencies, suppliers, governments, and business partners of your NGO; their capabilities, performances, problems	
Climate: The macro-environmental factors affecting your organisation. (Use a PESTLE Analysis that can be found in **Resource 9** to assist your anaysis of this factor)	

Resource 5 SCOPE Analysis

A SCOPE Analysis helps you create a detailed strategy for the future of your organisation and its projects. SCOPE focuses on the specific opportunities and challenges of a given project from a broader internal and external perspective. It's an alternative to the SWOT-Analysis.

Situation | Core Competencies | Obstacles | Prospects | Expectations

SCOPE	Your response:
Situation: key elements of the problem within the context of your community	
Core Competencies: key capacities that your organisation does best (independent of the problem)	
Obstacles: key challenges that your organisation needs to overcome in order to help solve the problem (internal and external)	
Prospects: the 'opportunities' for your organisation to improve your impact by taking advantage of your 'Core Competencies' within the 'Situation'	
Expectations: what will happen in your community over your project cycle that might have a (positive or negative) impact on your project	

Resource 6 Problem Tree

The Problem Tree Analysis is used to provide a broad overview of the problem you seek to address, as well as to identify specific causes and effects of this problem.

Start your analysis with the blank Problem Tree below and add new branches, roots and layers to account for all of the elements related to your specific problem.

Step 1 **Identify the main problem**

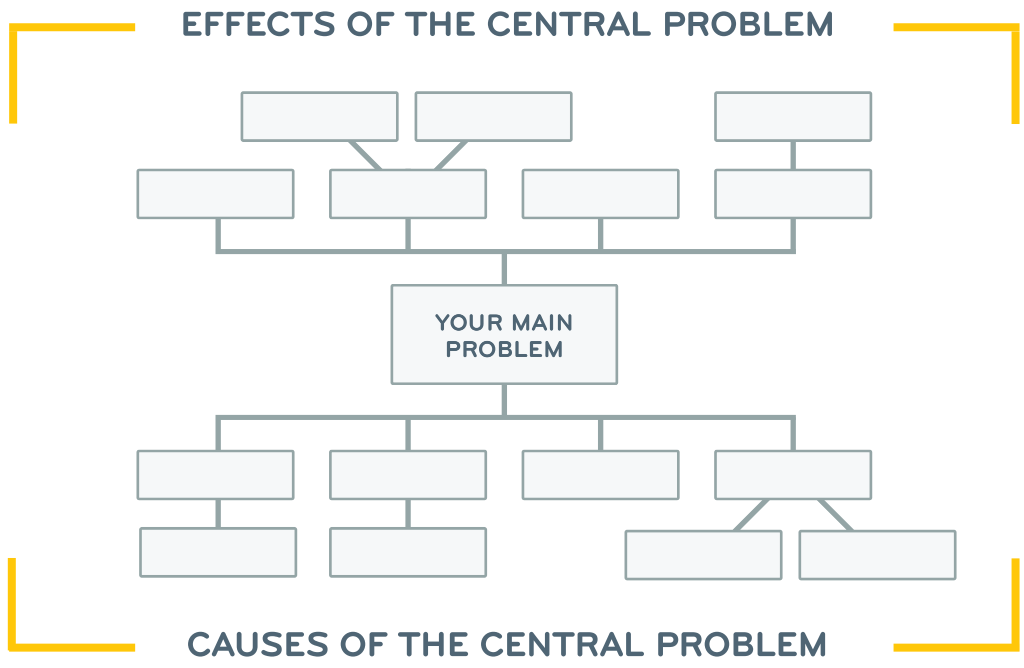
Identify the **main** problem and place it in the centre of the tree

Step 2 **Identify the causes**

Identify the **causes** of the main problem and place them below the problem as the 'roots' of the Problem Tree (dig deep for multiple layers of the causes).

Step 3 **Identify the effects**

Identify the resulting **effects** of the main problem and place them above the problem as the 'branches' of the Problem Tree.



Resource 7 Objective Tree

The Objective Tree Analysis is used to identify specific objectives that will overcome each element of your Problem Tree (see **Resource 6**). To create an Objective Tree, simply rephrase each element of your Problem Tree into a positive solution statement.

Step 1 Identify the main objective

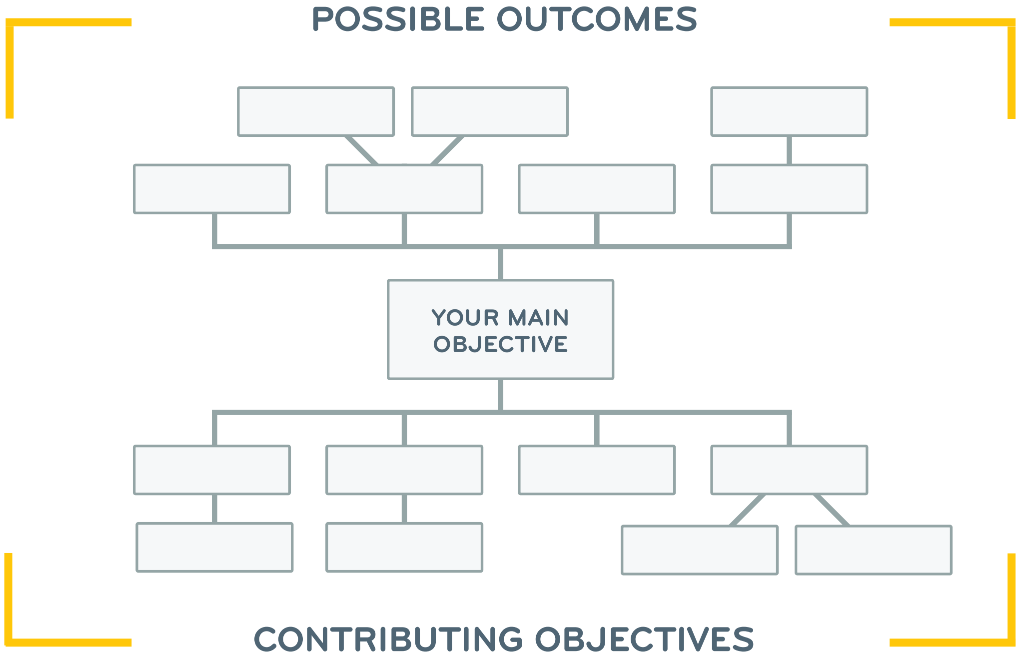
Rephrase the problem into a positive objective.

Step 2 Identify contributing objectives

Rephrase the causes of the central problem into positive phrases. These are generally ideas for smaller objectives that could might help you achieve your main objective.

Step 3 Identify possible outcomes

Rephrase the effects of the central problem into positive phrases. These are generally outcomes that may occur if you achieve your main objective.



Resource 8 Alternative Analysis

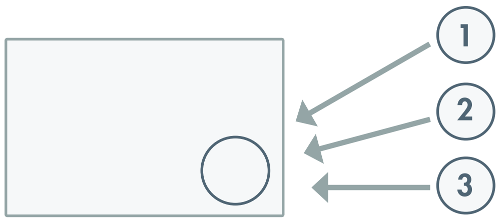
With the help of an Alternative Analysis, you can identify related groups of objectives that are linked to a specific type of development strategy.

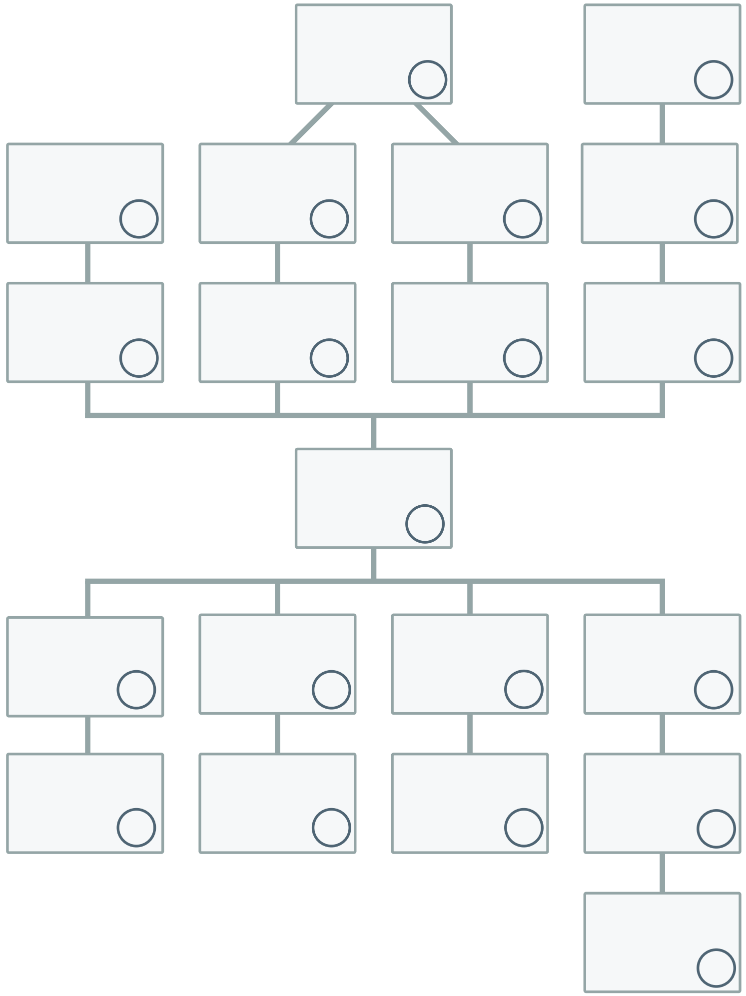
To complete your Alternative Analysis, look at your Objective Tree as a whole and group your objectives into categories related to specific types of development strategies.

Use the blank Alternative Analysis to get started on your analysis, then add more alternative strategies according to size and range of solutions on your Objective Tree.

Put a number in the circle found in the bottom corner of your objectives to help categorise your alternative strategies. The different numbers represent the alternative strategies that you have identified. Each number indicates which one of the strategies can be employed to meet the individual objective. In the boxes below, name and briefly explain the alternative strategies you have identified.

eg: Example:





Alternative Strategy 1:

Alternative Strategy 2:

Alternative Strategy 3:

Resource 9 PESTLE Analysis

Use a PESTLE Analysis to identify possible stakeholders relevant to your project. PESTLE stands for:

Political | Economic | Social/Cultural | Technological | Legal | Environmental

PESTLE	Your response:
Political: For example, government departments who may be able to provide funding; lobby groups who might advocate for or against your project	
Economic: For example, funding agencies or donors who might support your work; local businesses that might receive more (or less) business due to your project	
Social/Cultural: For example, specific cultural or ethnic groups that might be empowered or marginalised by your project; gender groups that might react differently to your project	
Technological: For example, companies whose equipment you may need to purchase; skilled tradesmen who may be needed to repair any broken equipment	
Legal: For example, government departments who may be required to 'sign-off' on local projects	
Environmental: Often the environment can be considered a stakeholder in itself	

Resource 10 Categorising Stakeholders Framework

Use this blank Stakeholder Category Framework to identify and categorise your stakeholders in Step 2 of your Stakeholder Analysis.

Your Stakeholders:	Their interest in your project:	Positive or negative interest?
Key Stakeholders: People, groups, institutions with significant influence or importance to project success)		
Primary Stakeholders: People, groups and institutions who are directly impacted by your project; Beneficiaries – Positively impacted and Dis-Beneficiaries – Negatively impacted		
Secondary Stakeholders: All other people or groups with a stake or interest in the project		

Resource 11 Stakeholder Importance/Influence Analysis

Rate your stakeholders` importance and influence over your project in this blank Stakeholder Importance and Influence Analysis Template.

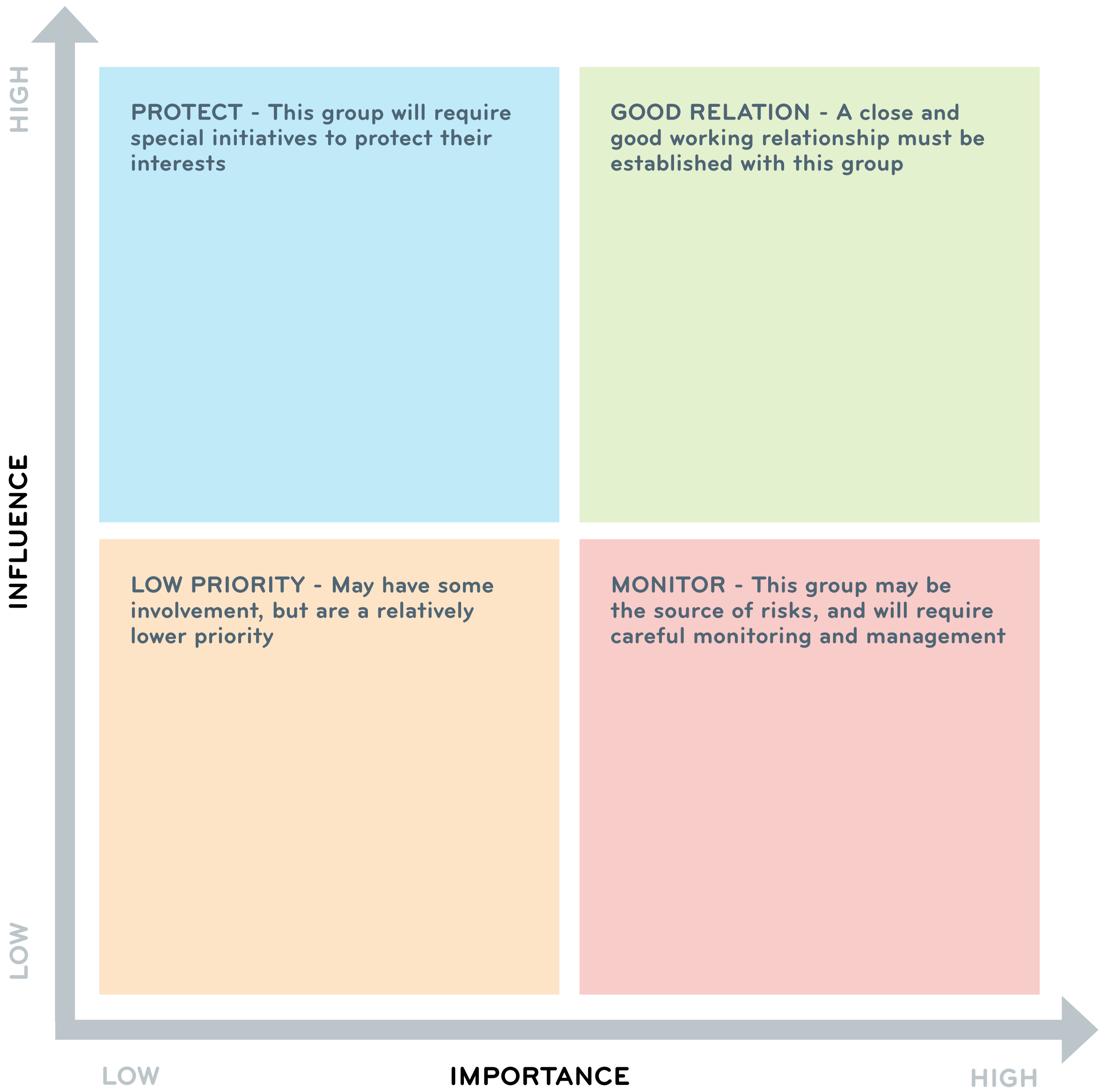
Importance and Influence are defined as:

- **Importance –** the priority given to satisfying the needs and interests of each stakeholder. (5= most important)
- **Influence –** the degree of power which the stakeholder has over planning and implementation of intervention/ activity. (5= have the highest influence)

Stakeholder:	Importance (1-5):	Your reasoning for importance rating:	Influence (1-5):	Your reasoning for influence rating:

Resource 11 Stakeholder Importance/Influence Analysis

Now plot the position of each stakeholder into the following Importance/Influence Grid to present the information graphically.



The positions of your stakeholders within the matrix, show who your most important and influential stakeholders are and help you determine the approach and cooperation model for each stakeholder.

Resource 12 Stakeholder Analysis

Use this blank Stakeholder Analysis Template to synthesise all of the important information about your stakeholders into a final framework that connects different stakeholders with your project.

In addition to the information you have already collected in your stakeholder category framework (**Resource 10**) and stakeholder influence/interest analysis (**Resource 11**), you will need to identify:

- Potential risks associated with the relationship your organisation will have with each stakeholder
- Strategies to guide your organisation's relationship with each stakeholder
- Which team members will be responsible for looking after each stakeholder

Your Stakeholder	What is their interest in the project?	What level of impact do they have upon success?	What can they contribute to the project's success?	What potential threats do they pose to success?	What strategy will you use to build a relationship with stakeholder?	Who is responsible for this relationship?

Resource 12 Stakeholder Analysis

Your Stakholder	What is their interest in the project?	What level of impact do they have upon upon success?	What can they contribute to the projects success?	What potential threats do they pose to success?	What is the strategy to build a relationship with stakeholder?	Who is responsible for this relationship?

Resource 13 Checklist for Identifying Possible Solutions

This series of checklists helps you comply a broad list of possible interventions to be incorporated into your project.

List as many interventions as possible without thinking too much about how appropriate they are. The unrealistic ones will be eliminated later.

Identify possible interventions by examining your objectives	
Look at your objective tree and list all the different ways you could reach each one of your objectives: • Start by working within the different broad strategies you identified in your Al-ternative Analysis from Module 3, Re-source 8. • Brainstorm specif-ic projects within these categories, to identify solutions that might meet multiple objectives in your tree at the same time.	List all possible Interventions here:

Resource 13 Checklist for Identifying Possible Solutions

Identify possible interventions by examining your stakeholders	
Think about the best fit for your primary beneficiaries: • What types of projects are they likely to be enthusiastic about? • Do these initiatives meet the needs and values identified by the local community? Think about the types of projects that will inspire your key stakeholders to support your project. Think about the specific types of support your stakeholders can provide your organisation and capitalise on that: • Example: If your project meets a specific government priority, you might be eligible for a government grant • Example: If your organisation has a good relationship with a local business, consider a project that maximises the support they could provide.	List all possible Interventions here:

Resource 13 Checklist for Identifying Possible Solutions

Identify possible interventions by examining your teams skills	
Think about the skills your team has and name solutions that work to these unique skill sets. If you think a solution is going to be really effective but are worried that your team doesn't have the skills for it: • think about ways they can learn the skills, or • find someone who has the skills (by partnering with other non-profits, advertising for volunteers, recruiting new staff) If you have the funds, consider outsourcing small, key elements of your work. • This can be the easiest and quickest ways to have specific, technical tasks completed by a skilled person	List all possible Interventions here:

Resource 13 Checklist for Identifying Possible Solutions

Identify possible interventions by examining your past performance	
Reflecting on past experiences is the key to success in the future, ensure that you are looking back at your own evidence and previous performance. After completing a project, take the time to reflect upon your work; think about what worked and what did not	List all possible Interventions here:

Resource 13 Checklist for Identifying Possible Solutions

Identify possible interventions by examining the work of other organisations	
If the work you are seeking to undertake is completely new to you, look to other organisations: • Often, they will readily share information publicly, whether through their own website or through associated networks. • Research online, trawl social media (Linkedin can be especially useful for this) and explore media sources like Great Big Story, The Guardian Development or on the Grassroots Collective to learn about new, innovative solutions to local problems. Researching the results of particular projects can tell you a lot about tactics, approach and even feasibility.	List all possible Interventions here:

Resource 14 Solution Analysis Framework

Use this blank Solution Analysis Framework to select the best intervention for your project based upon your specifically defined assessment criteria.

Complete the Solution Analysis Framework in four steps:

1. Place your problem and the possible solutions on the left-hand side of the table
2. Place your criteria along the top of the table
3. Now give each possible solution a ranking of 1-10 based upon how well it meets that criteria (1 = criterion poorly met/ negative, 10 = criterion fully met/ positive)
4. Once you have completed this process for all your solutions and criteria, you can add up all the numbers in your table and use that as a guide to help you choose the most appropriate solution. The solution with the highest number in total is the one with the most positive outcome.

Your Problem:	Your Solutions:	Criterion:	Criterion:	Criterion:	Criterion:	Criterion:	Total:
	#1.						
	#2.						
	#3.						

Resource 15 Theory of Change Framework

This blank Theory of Change framework will provide you with the foundation to plan your implementation strategies, identify the key participants and develop methods of evaluation.

Complete your Theory of Change in 5 steps:

1. Place the problem at the bottom and the long-term change at the top of your framework.
2. Note down the necessary pre-conditions below your long-term change.
    - Work backwards, begin with the medium-term pre-conditions that will lead to your long-term change, then add the short-term preconditions that will lead to these medium-term changes.
3. Arrange your pre-conditions into outcome pathways by identifying the causal linkages between them.
4. Transform these pre-conditions into intervention strategies.
    - Begin this process at the bottom of your framework. Focus upon the short-term pre-conditions first, then work your way up the framework.
    - Identify a specific intervention that will assist in achieving each pre-condition.
5. Identify indicators for each of your initiatives that will be used to assess the performance of each intervention (Each outcome should have its own specific set of indicators).

Use the layout of the template on the following page as a guide. You will likely have to add many more pre-conditions and outcome pathways in order to produce a thorough Theory of Change framework for your project.

Resource 15 Theory of Change Framework

Put your Long-Term Goal here:

Put Your Medium-Term Goal here:

Put Your Medium-Term Goal here:

Put Your Medium-Term Goal here:

Put Your Short-Term Goal here:

Put Your Short-Term Goal here:

Put Your Short-Term Goal here:

Put Your Interventions here:

Put Your Interventions here:

Put your Problem here:

Resource 16 Monitoring & Evaluation Plan Framework

This blank Monitoring and Evaluation Plan Framework will help you create a clear plan for your monitoring and evaluation activities.

Create an individual framework for each initiative.

Monitoring & Evaluation Plan Framework	
Your Initiative	
The Specific Performance Indicators:	
The specific unit of measurement:	
The data source:	
The specific method or tool of data collection:	
The frequency of collection/ reporting:	
How you will use this information:	
Who is responsible for collecting the data:	

Resource 17 Logical Framework

Use this LogFrame Analysis framework to produce your own, larger version to synthesise all your project planning information and account for all of your goals, outputs and activities. The guide on the below will help with filling in the details. See **Module 8** for a detailed example LogFrame.

Guide to completing a LogFrame Analysis:

VERTICAL = the means-end relationships between your outputs and activities and your goals and purposes.

a. Define the over-arching goal that your project will help to achieve. - Check **Module 2** , **Module 3** and **Module 6.**

b. Define your project's purpose (the medium-term benefits to beneficiaries of your activities). Check **Module 6.**

c. Identify the outputs required to achieve your identified purpose (short-term goals, immediate effects of your activities). Check **Module 6.**

d. Outline the activities (the specific planned initiatives) needed to achieve each output.

HORIZONTAL = the measurable indicators you will use to identify success, the means of verification you will use to monitor these indicators and the risks and assumptions that might impact upon your project's success.

a. Outline specific quantitative and qualitative indicators for all tiers, refining the results by detailing how you will know that the goal, purpose, outputs and activities have been achieved. Check **Module 7**

b. Input the means of verification (methods to measure your indicators and assess your performance). Check **Module 7.**

c. Specify the assumptions and risks to your project within each level to prepare for, and help mitigate, any of the risks that might sabotage your project`s success. Check **Module 2** (SWAT or SCOPE tool), **Module 4** (PESTLE tool).

d. Outline the activities (the specific planned initiatives) needed to achieve each output.

Resource 17 Logical Framework

	Horizontal Logical Summary	Indicators	Verification	Risks and Assumptions
Long-Term Goals				
Purpose				
Outputs				
Activities				

Resource 18 Gender Context Worksheet

This template Gender Context Worksheet will help your organisation create a succinct summary of the gender roles and relationships within your community. Use it as part of your Gender Analysis.

Keep in mind to:

- Use evidence to support your team's assumptions, referring to information online or in the local media.
- Make sure the group creating your worksheet is made up of both men and women, ideally of varying ages and ethnicities within the community.
- This checklist is meant to provide a more general and transferable summary of your community's gender context, it doesn't have to be directly relevant to your project.

Assessing existing gender roles and responsibilities in your community:	
• What are the traditional and current roles, responsibilities and practices that women, men, girls and boys are supposed to adhere to, particularly in the household? • How have things changed in recent times? Why has this changed? • Are there issues of access to women or their ability to leave the home within your community, especially for women, girls and vulnerable people? • How does age affect gender roles and responsibilities? • What do you know about decision-making and the control of assets and resources at a household level?	List your responses here:

Resource 18 Gender Context Worksheet

Identify education and economic empowerment of different gender groups:	
• What do you know about women's, men's, girls' and boys' literacy rates and access to primary, secondary and tertiary education? Are there any major differences between genders, for example, are there high illiteracy rates for older women, older men, younger women and younger men? • How do women and men generally earn an income? • What are the key issues on division of labour, for example, what types of work do women, men, boys and girls undertake and how does this affect them differently?	List your responses here:

Resource 18 Gender Context Worksheet

Identify how different gender groups interact in the community and whether there are any legal policies in place to help minimise gender disparities:	
• How do women and men participate in national, local and community level decision-making? • Can women participate equally in local and community-level decision-making? Think about what context this takes place in, the roles they tend to play and the challenges they often face. • What is the role of women's groups and organisations in this context? • Are there any government policies that are important to understanding gender equality in your community? • How are these gender equality laws implemented, or not implemented in practice?	List your responses here: