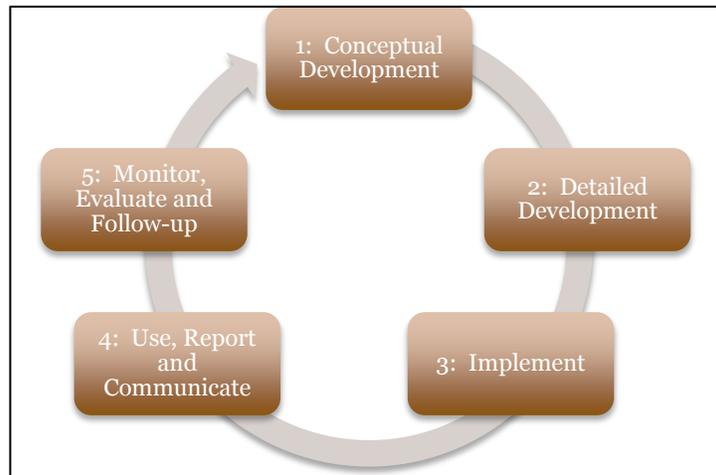


## PROJECT MANAGEMENT TEMPLATE



### STEP 1: CONCEPTUAL DEVELOPMENT

This is intended to get to the “What” and “Why of the project

#### Issues Scan and Research Review

- What is the problem and why should we be doing something about it? (rationale)
- How does this fit with our work or mandate? (linkages with previous work, consider other priorities, strategic plan)
- What views are there about the issue (including members and others)
- Is there existing literature or research that might help? Are there information gaps?
- SWOT analysis

#### Initial project description, goals, objectives, risks

- Describe the project in a sentence or two
- What are we trying to achieve and why (goals)
- What kind of outcome would we like from the project (objectives)
- What could get in the way of meeting our goals or objectives and how would we manage these?

#### Approvals to proceed

- How will you keep Board informed and engaged? Does the Board need to approve?
- Are there external approvals needed?

#### Other ideas:

<b>STEP 2: DETAILED DEVELOPMENT</b>			
<b>This is intended to get to “How” and “When” you will do the project</b>			
<b>List the specific activities that you will need to do to undertake the project, and consider who should do them, within what time frame, and how much they will cost:</b> Consider listing these by various stages (e.g., planning, research, consultation), or specific groups of activities (e.g., survey design, survey analysis, writing report, organizing meeting)			
<b>Activity</b>	<b>Assign to</b>	<b>Timing</b>	<b>Budget</b>
<b>Gather Resources</b> <ul style="list-style-type: none"> <li>• What activities can be undertaken internally, and which need external expertise?</li> <li>• Consider funding partners – who else benefits from the project (e.g., local governments, central government, civil society)</li> <li>• Consider what internal resources are available and who needs to approve these</li> </ul>			
<b>Develop success indicators and monitoring program</b> <ul style="list-style-type: none"> <li>• How will you know if the project has been successful?</li> <li>• Try to develop at least some quantitative measures</li> <li>• How will you document successes and challenges; during what time periods</li> <li>• Try to develop a system that is manageable and appropriate to the project</li> </ul>			
<b>Other ideas:</b>			

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### STEP 3: IMPLEMENTATION (USING A SURVEY AS AN EXAMPLE)

<p><b>Develop survey questions</b></p> <ul style="list-style-type: none"> <li>• review goals and objectives and consider what questions will meet these objectives</li> <li>• review previous surveys or member input</li> <li>• think to how data is compiled/analyzed (e.g., avoid all open ended questions)</li> <li>• Consider testing survey with small group</li> </ul>	
<p><b>Implement survey</b></p> <ul style="list-style-type: none"> <li>• determine what organizations will be surveyed, and who in each organization you would like to respond</li> <li>• develop distribution lists and deliver survey</li> </ul>	
<p><b>Collect and compile survey results</b></p> <ul style="list-style-type: none"> <li>• consider spreadsheets or other means to compile results</li> <li>• consider follow-up means if survey response rate not sufficient</li> </ul>	
<p><b>Analyze results</b></p> <ul style="list-style-type: none"> <li>• undertake statistical analysis, and consider different ways to categorize results (e.g., by size or type of community; for LED, by primary economic sector)</li> <li>• look for trends, themes, etc</li> </ul>	
<p><b>Follow-up and further research</b></p> <ul style="list-style-type: none"> <li>• consider whether analysis could be enhanced by more detailed discussions with some respondents</li> <li>• consider whether further independent research might help to fill some information gaps</li> </ul>	
<p><b>Other ideas:</b></p>	

### STEP 4: USE, REPORT AND COMMUNICATE (USING SURVEY PROJECT AS AN EXAMPLE)

<p><b>Document results</b></p> <ul style="list-style-type: none"> <li>• write and distribute a report about the survey results</li> <li>• include context setting, goals, objectives of</li> </ul>	
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<p>project etc</p> <ul style="list-style-type: none"> <li>• include methodology and statistical or other analysis</li> <li>• include narrative (what does the analysis say to you? consider including other information in report beyond survey)</li> </ul>	
<p><b>Member Engagement or Dialogue</b></p> <ul style="list-style-type: none"> <li>• Make survey report available to members</li> <li>• consider creating opportunities for members to discuss LED and for association to highlight their work</li> </ul>	
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• think about how the results of the survey could be used to advocate on behalf of members</li> </ul>	
<p><b>Other ideas:</b></p>	

### STEP 5: MONITOR, EVALUATE AND FOLLOW-UP

<p><b>Observe/monitor process and results</b></p> <ul style="list-style-type: none"> <li>• take time during implementation phase to think about and document how the process is working</li> <li>• consider whether the process has lead to the results that were expected or not</li> </ul>	
<p><b>Measure and evaluate</b></p> <ul style="list-style-type: none"> <li>• review indicators to measure success established in development phase</li> <li>• measure against the indicators</li> <li>• evaluate the success of the project based on these indicators</li> </ul>	
<p><b>Document process, lessons learned, etc</b></p> <ul style="list-style-type: none"> <li>• document specific processes and activities, how well they worked, how they could be improved, etc (to aid in next project)</li> <li>• consider using the results and lessons learned to determine what the next project could be, or how it should be designed</li> </ul>	
<p><b>Other ideas</b></p>	

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