

Facilitate planning and participatory processes for

CBOs

Level 4

- Learner Manual -

The development practice project

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CONTENTS

OVERVIEW	9
SPECIFIC OUTCOMES AND ASSESSMENT CRITERIA.....	11
ACTIVITIES.....	13
Symbols used in this workbook.....	14
INTRODUCTION	15
REFLECTING ON OUR WORK.....	17
Action learning.....	17
Strategising	20
Strategic review	21
Using a timeline for reflection.....	23
SWOT analysis.....	24
REFLECTING AND PLANNING TOGETHER	31
Decision-making in groups	32
Facilitating planning processes.....	35
Consulting stakeholders	39
Participatory planning	40
WHERE ARE WE GOING – SETTING STRATEGIC DIRECTION.....	43
Building a vision	43
Choosing aims and objectives	46
PLANNING TOGETHER	55
Action planning.....	55
Documenting the planning process.....	61
HOW ARE WE DOING?.....	63
Indicators of success.....	63
Keeping track of progress.....	67

OVERVIEW

Welcome to this manual on Facilitate planning and participatory processes for CBOs. Community organisations often start out as consultative and responding to the need in their community. However as the demands of their work increase, and often as the organisation grows in size, less time is available (or taken) for planning and strategising in a participatory way.

This course is for those community development workers, either working in a community or as part of an organisation, who wish to develop their planning and strategising in order to improve the effectiveness of their work.

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

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

Please read the competency standard below carefully.





SPECIFIC OUTCOMES AND ASSESSMENT CRITERIA

Specific outcomes	Assessment criteria
<p><i>Competence in this standard means that the learner has clearly shown that s/he is able to...</i></p>	<p><i>Tasks and activities completed by the learner contain the following evidence of competence...</i></p>
<p>Reflect on and evaluate previous plans and activities</p>	<ul style="list-style-type: none"> • The action learning cycle is explained and organisational activities are suggested for each stage (e.g. strategic planning, mid-year review etc) • Previous plans are reviewed and the achievements and challenges discussed. Some project learnings are suggested. • Various methods to reflect on organisations delivery and approach are described (methods such as SWOT analysis, revisit mission and vision are described)
<p>Facilitate agreement on strategic objectives</p>	<ul style="list-style-type: none"> • Different perspectives and perceptions of issues in the community are shared and explored. (There is an awareness of the need to balance different stakeholder interests and use a participatory approach) • Stakeholders are consulted on strategic objectives • A common vision is developed and agreed – (from informal interviews to inclusive focus group discussions and public meetings). • Achievable and clearly defined objectives, that include prior project learnings, are agreed too (so that everyone understands them) • Objectives are practical and achievable (within the budget and human resources available) <p>1. Objectives are aligned to vision.</p>
<p>Develop a detailed plan for the organisation</p>	<ul style="list-style-type: none"> • Agreement is facilitated on activities, roles and responsibilities within an agreed time frame • A plan is developed that clearly identifies specific tasks and activities Responsibilities are allocated for tasks • Time frames are agreed • Tasks are appropriate to resources and skills available

	<ul style="list-style-type: none">• Resources and budget required are detailed
Develop indicators of success that reflect diverse stakeholder perspectives	<ul style="list-style-type: none">• Some example indicators are provided in the project plan• Indicators reflect the perspectives of important stakeholder groups• Indicators are clear and easily understood

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



ACTIVITIES

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



Symbols used in this workbook



Important thought

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



Definition

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



Self-test

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



Case study/Example

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



Individual activity

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



Group activity

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

INTRODUCTION

Community based organisations emerge in communities all around the country, in response to the need for action on social, political and environmental issues. When organisations are first formed, a lot of thought goes into planning and visioning for the organisation and its future. For a lot of organisations however, once the pressures and demands of the work grow, they do not find the time to stop and reflect and to re-plan for their organisation and what they are trying to achieve. This thinking process and planning for the future is often called strategising.

Strategising is an organised thought process. This involves thinking ahead and setting goals for where you want to be. This cannot happen without first stopping and seeing where you have come from and learning from that before planning for the future.

Strategising together gives us a chance to learn about the organisation, measure your progress over time, develop the organisation and improve its work and establishes clear goals that change according to changing needs.

Each member of our organisation and often the beneficiaries and community as well has insight into the learnings and future direction of the organisation. Therefore organisational planning and strategising should ideally be a participatory process that includes as many of those affected as possible and gets everyone's viewpoint.



In this course we will be exploring this strategising process and how this can be done in a participatory way. Through the manual, we will cover these sections:

1. Reflecting on activities and previous plans through a strategic review process;
2. How to facilitate agreement in a participatory way ;
3. Setting strategic direction;
4. Planning together;
5. And developing indicators of success.



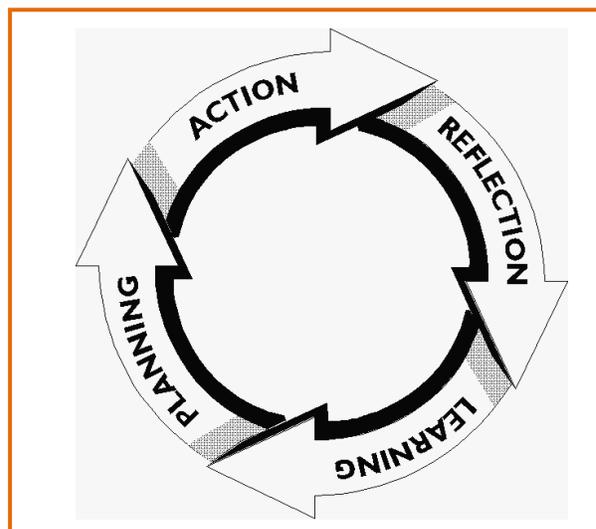
REFLECTING ON OUR WORK

So much of our work as community development practitioners is about responding to critical need, that we don't always make time to think about our work and make time to improve it. Planning is essential to the effective running of activities and programmes in any organisation. However planning that does not take into account the lessons of the past or the considerations of the 'big picture' will usually end up causing problems in implementation and in achieving our goals.

Learning about how to improve our work takes conscious time and effort. One way of doing this is through making use of action-learning.

Action learning

Action learning describes the process by which we learn from our experiences and use this to change our behaviour or improve our practise. Below is a diagram that shows this process of learning and developing by reflecting on our experience.



The action is what actually happened and the significant moments and occurrences that happened during implementation of our activities.

We need to make time in our organisations (or practise) to reflect on this. Reflection is the process of analysing, evaluating and thinking about the events in order to make them more conscious. What caused our success? What helped and what didn't? Looking at what happened from different angles. Problem is that



we do not do this naturally – often only happens as a result of a crisis. Therefore we need to develop a practise and ensure time is set aside for this.

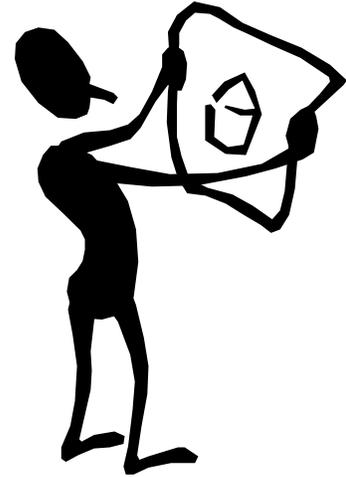
Reflection however is no guarantee that learning has taken place! Often people reflect and then repeat the same mistake. Learning involves taking the general lessons from our reflections – “so what tends to happen in these kinds of situations is...”. We look for lessons that will influence our future plans and actions in a positive way.

We then need to do something with these new insights. Planning is the process of taking our general lessons and transferring them into actual decisions that will insure improved practise and results and this is then written into future plans.

Planning that does not take into account the lessons and insights from the past, is a waste of time!

Strategising

Thinking about our organisation in an organised way is called strategising. Strategising is about looking at the 'big picture' – who are we as an organisation? What is our purpose? Where are we going? What have we done and how can we learn from this. It is a part of the reflection processes necessary in an organisation that wants to develop and grow.



Why should we do strategising?

Thinking about our work and organisation helps us to learn from our mistakes, establish clear goals, improve our programmes and focuses resources on what is important.

Who should do strategising?

Strategising should involve everyone in your organisation, because each person has a unique perspective that can contribute to learning and development and improve the strategising process

When should we do strategising?

This depends on the need of your project or organisation but it is an important part of the development process that often gets forgotten.

Reflection should happen throughout the life of an organisation. Strategising is a necessary part of reflection. Therefore as a guideline, strategising should be done:

- When an organisation is getting started - often called a strategic plan.
- When you are preparing or starting a new project
- When you are finishing a project
- At least once a year to evaluate the overall progress of your organisation and to set a new strategic direction. This is often called a strategic review.

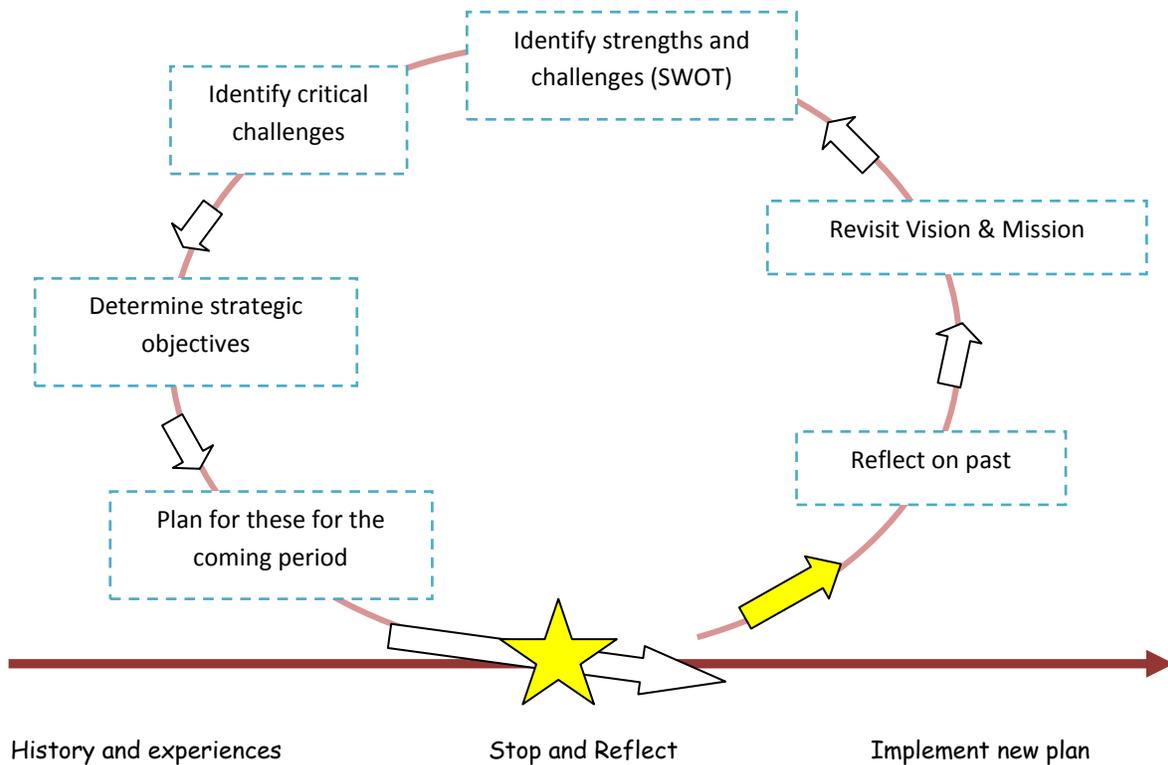
Strategic review

A strategic review enables an organisation to look at and evaluate itself. It is a 'mirror' of the health of the organisations and identifies critical issues at a particular point in time. It should make use of an action-learning approach to reflect on what has happened and to draw learnings that will guide the new plan.

Strategic review involves stopping and reflecting back on our history and experiences. We need to take a break from the daily programme and demands of our work and reflect.

A possible process for strategic review looks like this:





There are a number of different ways to do a strategic review. You can just discuss it in informal meetings but organising a workshop with all stakeholders to review your work in a creative way is a good way to do it. Some creative ways to do this are: drawing a picture of the current reality, individual reflection on moments of success and challenge, discussion on the past year or areas of work or do a detailed analysis of your last plans. Two methods that you might find useful are using a timeline to reflect on the past and/or doing an analysis of the strengths and challenges that the organisation faces (also called a SWOT analysis).

Using a timeline for reflection



Individual activity

In organisations or on your own, draw a timeline of your organisation since it started until this point. Try to include all the important events that you think have been part of creating the organisation, have influenced its work or have been important in developing your programmes.

You can also use timelines to reflect on the last year, an event or a project. It is helpful to visually see where we have come from and have a chance to discuss as a group what we have learnt from that or perhaps even what we are not learning and need to address.

SWOT analysis

This is a way of analysing the internal and external health of an organisation currently. It is a photo of where we are now which can help us identify what we need to work on. It looks at the Strengths, Weaknesses, Opportunities and Threats.



Definition



Strengths are what your organisation has, that makes it stronger. They are all the things that are good about your organisation, for example committed members.

Weaknesses are those that might make your organisation struggle to succeed. These are internal to the organisation, such as a lack in capacity amongst your members. Sometimes it is helpful to call this “Challenges” instead of weaknesses to see it in a more positive way.



Opportunities are all those things outside of your organisation that could assist your organisation in becoming stronger, e.g. training courses. They often refer to the opportunities in your sector or the environment that your organisation works, for e.g. a new social development policy could be an opportunity.

Threats are all those things outside of your organisation that could weaken your organisation, e.g. Stigma around HIV/AIDS could prevent people from coming to your workshops.

Below is an example of a SWOT analysis.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Community based • From community (understand need) • Committed group • Hard working • Skilled • Community support (school) • Some equipment • Full-time co-ordinator • Access to space and vehicle 	<ul style="list-style-type: none"> • Unreliable at times • Lack resources • Poor management skills • Conflict • No stable office • Part-time staff • Too many demands (overloaded)
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Community volunteers (unemployed youth) • Funding • Potential partners (NGOs) • Audience (performance) • Some contacts 	<ul style="list-style-type: none"> • Community violence • Community apathy and jealousy • Poor facilities • Flooding in winter • Stigma attached to 'squatter' area



Individual activity

Use the SWOT analysis template below to reflect on your organisation or your work in the community.

	STRENGTHS	WEAKNESSES
INTERNAL TO THE ORGANISATION		

	OPPORTUNITIES	THREATS
EXTERNAL TO THE ORGANISATION		

Then highlight or underline a few of the most important to deal with and prioritise these (to prioritise means to put things in an order of importance – the most important, second most important, etc).





Self-test

You should be able to:

- Review previous plans and achievements and discuss challenges.
- Explain the action learning cycle and suggest organisational activities for each stage (e.g. strategic planning, mid-year review etc)
- Describe various methods to reflect on organisations delivery and approach (methods such as SWOT analysis)
- Identify some project learnings.

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



REFLECTING AND PLANNING TOGETHER

Every group has to make decisions and the way in which these decisions are made will deeply affect the commitment of the members to the life and work of the group. If we have shared in the process of making a decision we are far more likely to carry it out.

It is this idea that is the basis of the participatory and consultative approach that is suggested one take with planning and strategising in a CBO. Involving as many people as possible and getting the input from a variety of stakeholders will help get different viewpoints that will assist you in understanding any issue.

The structure of an organisation is often dependant on the aim of the organisation. In bureaucratic institutions the planning, decision-making, visioning and problem-solving are in the hands of a few. In many developmental and democratic organisations, the need to represent all and to hear the voice of the people is taken into account. This has led to a new way of making decisions and of managing – one in which the purpose of management is to enable people (in organisations and the communities we work with) to become self-reliant, creative, self motivating and to empower them through participation in the processes of organisational strategising.

In order to achieve this, the organisation and its leaders must be good at making a space to receive input, be able to receive feedback and be able to facilitate agreement when decisions need to be made and plans created. Most groups need some practise in decision-making so that all members learn what helps and hinders decision making.





Definition

What is facilitation? To facilitate means to *make easy*. To facilitate agreement means to assist a group to come to an agreement together. It does not mean to do for others but to assist a group to do something for themselves.

In organisations, the role of the facilitator is often taken by the leader or project manager. In their role as facilitator, they are tasked with assisting groups to plan together, to allow for discussion and feedback in order to evaluate and develop the work of the organisation and to build consensus together.

Decision-making in groups

Some common problems with decision making in groups

There is a wide range of difference in how involved people are (and feel) in the decision making process. Sometimes only one person really makes the decision.

We can depict this range from least involved to truly involved like this:



One person - two in agreement - clique - minority - majority - silent consensus - true consensus



Not everyone should make all the decisions. The key in democratic leadership is to be able to decide who should be involved in making decisions. The basic rule is that the more deeply people are affected by a decision, the more they should share in making it.

Other difficulties in making decisions are: Fear of consequences, conflicting loyalties, interpersonal conflict, hidden agendas, clash of interests and inadequate leadership

In order to make good decisions together, people need to have a clear goal and the freedom to think (to test ideas freely and be able to make contributions). The leader's role is to encourage and support this and maintain this atmosphere.

Who should make decisions? Most often it is not possible (or helpful) for everyone to be involved in all decisions. A guide is that the more important the consequence the more important it is to get people involved. People should be involved when:

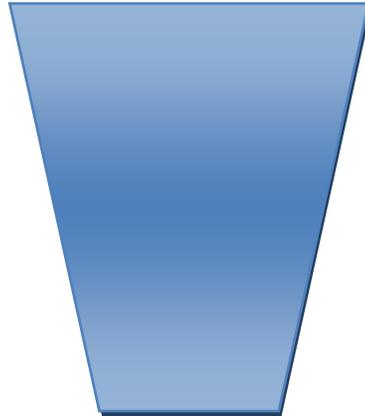
- a. Various points of view and opinions are needed
- b. When the group is directly affected by the decision
- c. When the group must carry out the decision
- d. When the group has learnt to work effectively together, sharing leadership functions and handling decision making procedures easily.



Below is a guide for who should be involved in what kind of processes:

TYPES OF PROCESS

Evaluation
Aims-vision
Recommendations
Goal setting
Policy direction
Delegation
Planning
Implementation
Delegation - coordination



WHO SHOULD MAKE DECISIONS?

The most people possible including stakeholders



As many members of staff as possible



Committees and work groups

Notice that this is different from the bureaucratic model where few and often only one person made the decisions about the aims and evaluates the programmes. It looks more like this figure in those organisations.



Planning includes many levels of participation from people. As much as possible, people need to be involved in several levels:

- Defining needs
- Sharing in the formulation of aims

- Making recommendations
- Evaluation

Facilitating planning processes

It assists groups to make decisions if these factors are in place:

- Clear goals
- Clear understanding of who is responsible for the decisions
- Good means of stimulating and sharing ideas
- Effective leadership and structures to deal with the size of the group
- Effective ways of testing different suggestions
- Commitment of the leader to genuine group involvement
- Agreement before hand of what procedures will be most useful.

It is therefore the task of the facilitator to ensure that these are in place.





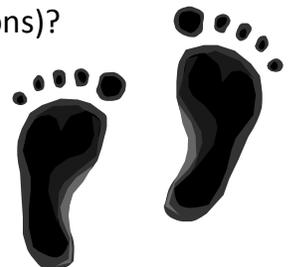
Group activity

What are the steps in planning and what is the role of the facilitator at each stage

Steps in planning together	The role of the facilitator

In order to facilitate planning in a group, following these steps is helpful:

- Diagnosis: What are the problems? What are the needs
- What do we want to achieve? (objective) in a particular period
- What are the possible ways of achieving this (brainstorm for proposals)
- What are the advantages and disadvantages of each (pros and cons)?
How much time and effort will be needed for each
- Which proposal do we accept



- Who will do what, when, where and how?
- At what point do we evaluate? How will we evaluate?

As a facilitator, a key skill is to be able to increase the participant's participation in discussion by using questions rather than providing the answers. Some hints for using questions are:

- Begin discussions with specific and well-prepared questions.
- Encouraging questions from participants, but also being prepared that participants are reluctant at the beginning to contribute
- Giving time and waiting for answers
- Don't ask questions with obvious answers
- Use open questions that begin with "what", "when", "where", and "how"
- Avoid agreeing or disagreeing flatly with participants answers
- Use the phrase, "What questions do you have?" genuinely





Important thought

Remember: Not only do you need to consult those in your organisation, but also make an effort to get feedback and insights from those outside the organisation. This is about consulting relevant stakeholders and asking for and being open to feedback and criticism.

Consulting stakeholders

At every level of the planning process, one should consider consulting those outside the organisation as well as within. As you will remember from our upside down triangle earlier, it is most helpful to have external opinion when one is doing an evaluation, formulating vision and aims and getting recommendations.



Who are the stakeholders?

Stakeholders can be both within your organisation and from outside in the community. Examples of stakeholders are:

- Government departments
- Staff
- Volunteers

- The clients or beneficiaries of the Project
- Other organisations doing similar work
- People who have the power to assist or block a decision
- People who will be affected by the outcome.

Participatory planning

A participatory approach involves the relevant stakeholders and role players so that their views, concerns and issues can be considered. Sometimes the participatory stakeholder process is seen as a frustrating and time-consuming process however, getting all the voices together can be a very valuable tool especially if planning a community development project.

Bringing people together involves bringing together many different values and conflicting values are unavoidable. However getting a common agreement on strategy is really useful. The participatory planning approach is a powerful tool to raise questions, discuss issues, set priorities, build relationships, and engage community groups in the development and implementation of community development plans.

Relevant stakeholders need to be involved in the process in a way in which they feel that their voice will be heard and taken into consideration. It needs to be a well structured process that promotes openness, fairness and respect.

These elements help make a successful participatory approach



- Good timing and clear objectives
- Broad based involvement
- Openness of the process
- Commitment and/or involvement of leaders
- Support of “established” authorities or powers
- Overcoming mistrust
- Strong leadership of the process



Self-test

You should be able to:

- Facilitate the sharing of different perspectives and perceptions of issues in the community. (To have an awareness of the need to balance different stakeholder interests and use a participatory approach)
- Know how to facilitate agreement and make decisions in a participatory way
- List ways to consult stakeholders on strategic objectives– (from informal interviews to inclusive focus group discussions and public meetings).

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



WHERE ARE WE GOING

SETTING STRATEGIC DIRECTION

Once we have reviewed our work and drawn some lessons, we need to start thinking about where we are going. This is called setting strategic direction. It is similar in many ways to what you do when you start an organisation but it is a process of relooking and checking that you are on the right track, and where necessary setting new directions.

Setting this direction involves:

- Building (or revisiting) a common VISION
- Developing (or revisiting) your MISSION STATEMENT
- Developing clear and realistic AIMS/GOALS and OBJECTIVES

We will look at developing a vision and aims and objectives in the following pages.

Buidling a vision



A vision is an **ideal** picture of the future – a dream of what your organisation sees as the perfect future where the needs that you are working on are met. It is this dream picture that you work towards as an organisation and that guides you to a better future.

Most organisations already have a vision that they wrote when they were formed. It is important to reflect on this vision every couple of years to check if it is still relevant to you as an organisation. It is also an important way to build ownership amongst staff and to ensure that everyone knows what the purpose of the organisation is.

There are many creative ways that you can revisit your vision. One can draw a picture of the ideal future, one can tell stories of the future that you dream of or you can get people to reflect on the legacy that the organisation wants to leave behind. However you do it, make sure that people are inspired and excited to dream and to express the future as they see it.



Group activity

In groups of 4, come up with a newspaper headline that captures your vision of the future for your community/ town/ country. It needs to say what has just happened (so in the present tense) Write this up and share with the group.



Important thought

See how these headlines all sound like a vision statement! This is one creative way to do visioning that gets everyone involved. All the headlines need to then be summarised into one. If you already have a vision statement, you can use this to check if your vision statement is still relevant to your organisation.

Remember that a vision statement is a dream for the future – it might not be achievable in your life time, but it is something great that we want to work towards.

A vision statement should be

- A positive statement
- Future based but written in the present tense
- Written with emotion and feeling.

A similar process can be used to revisit your mission statement.

Notes



Choosing aims and objectives

Once you are clear on your mission and vision, you need to revisit or select your **aims** (also called goals). This describes in more detail what your long term goals are as an organisation (as opposed to objectives which are shorter term, more specific activities) and describe an outcome that you would like to see.



They need to be written as clearly and simply as possible and describe what you want to achieve.

An example for a programme that supports treatment literacy on HIV/AIDS

Our aims are:

- To improve HIV Awareness amongst school going youth
- To ensure that HIV positive people and their families have good treatment literacy training and support
- To build capacity in the clinics and with medical staff to offer appropriate information and treatment to HIV positive people

For a programme that does youth development and life-skills programmes:

- To develop life skills amongst youth at risk in our community
- Develop healthy parenting skills
- To create a range of youth friendly resources and programmes in the community

Once you get into detailed proposal writing or project planning, these then get broken down even further into the short term goals that will be focused on, to make these aims happen. These are called **objectives** and are normally specific for a particular time period.

Aims are our goals while the objectives are the things we will do to make that happen. Our aims tell us **why** we want to do something, while our objectives tell us **how** and **what** we will do to achieve this.

For example, if your aim is to develop parenting skills, some objectives might be:

- To facilitate 12 parenting skills workshops to 20 parents of the life skills group in Imizamo Yethu during 2008
- To run weekly support group sessions once a week for 3 months for 10 at risk families

Objectives need to be **SMART**

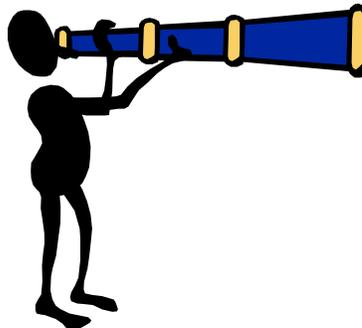
Specific

Measurable

Achievable

Realistic

Time-bound



What do the elements in SMART mean?

(1) Specific

An objective should be as specific as possible. Instead of saying “Workshops will take place”, you could be more specific and say what topic(s) the workshops will be about.

(2) Measurable

Objectives should be measurable. This means that numbers are attached to it. For example, instead of saying “parenting workshops will be provided” you could add how many of these workshops you will provide and how often.

(3) Achievable

It is advisable that you check whether the objective is achievable. Is there a person in your organisation or someone you could ask who is able to conduct these workshops?

(4) Realistic

If you are a small organisation and your objective is to hold 4 meetings a year with South Africa’s president as a guest speaker where he tells the members of your community how art can prevent crime, the objective would not be realistic – and probably not be achievable, either.

(5) Time-bound

When you develop an objective, it should preferably have a time-frame. For example, instead of saying “12 parenting workshops will be provided”, it would be



good to add within which time you would like to run these workshops, e.g. “in 2006” or “between January and July”.

The aim is what you want to achieve and the objective is how you will do this



Example: Aims and Objectives

For the Youth Life Skills programme:

Aim 1: To develop life skills amongst at risk youth over a one-year period.

- Objectives:
- a) Facilitate weekly life skills workshops for Imizamo Yethu High for up to 50 youth (13-16 years) during the 2006 school year
 - b) Develop and help coordinate a school youth group that meets monthly with 20 youth to organise activities and events at Imizamo Yethu High School
 - c) Train youth as peer counsellors

Aim 2: ...

Children’s HIV Aids Project

Aim 1: To ensure that HIV positive people and their families have good treatment literacy training and support

- Objectives:
- a) Train 15 community volunteers in treatment literacy (3 day workshop) to be treatment supporters to 50 families for 2008
 - b) Offer 3 one-day training workshops on treatment literacy and



The objectives could then be:

1. To raise R10 000 funds for an internal staff training programme for 2008
2. To send the management team on 4 day project training at Project Skills Trust by March 2008
3. To identify and develop partnership with a capacity building organisation to support the 2 managers with monthly coaching for 2008



Individual activity

Select one of the challenges that you identified as a priority in your SWOT analysis. Change this into a positive to make an aim for the year (just remember that your aim should be realistic and achievable).

Write up some objectives that will help you address this issue.



Self-test

You should be able to:

- Develop a common vision and objectives in a participatory way
- Facilitate agreement on practical and achievable objectives (within the budget and human resources available)
- Integrate project learnings into future planning and objectives
- Align objectives to vision.

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

PLANNING TOGETHER

“Failing to plan, is planning to fail”

Now that we have a clear idea of what we are trying to achieve (our aims and objectives) we need to break this down into the steps it will take to make this happen. Taking time to think through all the things we need to do to achieve our objectives will help us reach our goals. Often in organisations, this is a step that gets forgotten and without proper planning, we run the risk of not achieving our goals.

Planning should be a separate, structured and planned process that includes as many people as possible. If possible, important planning (such as strategic planning) should be done outside of the normal work place. Some people say although planning is important, even more important is the process of how the plan is developed. A good planning process leads to good relationships amongst staff (stakeholders) and allows people to see how their role fits into the overall vision.

What?	How?	When?	Who?

Action planning

An action plan tells us

- **What** needs to be done (Tasks)
- **When** it needs to be done (Time Frame)

Below is an example for what might be in a plan for the youth group example that we mentioned above.

AIM	To develop life skills amongst at risk youth over a one-year period.				
Objective 1	Facilitate weekly life skills workshops for Imizamo Yethu High for up to 50 youth (13-16 years) during the 2007 school year				
What?	When?	Who?	What partners?	Resources?	
Consult with teachers on needs for workshops	January 2007	Facilitation team	None	Time and transport	
Organise focus groups with youth to identify needs	January 2007	Facilitation team	None	Time and transport	
Design workshops based on identified needs	Finish design by end February 07	Facilitation team	Life Skills SA	Time, books	
Set up timetable with schools	End March 07	Facilitators and project manager	Schools in Samora, Dept of Education	Phone costs, transport	
Produce workbooks	End March 06	Project manager	Printers	Stationery, paper, printing	
Run workshops	Weekly. April 07 – Nov 07	Facilitators	Schools, Arts alive	Art materials, paper, staff	
Evaluate workshops	January & February 2008	Project manager	NGO evaluation trust	R10 000 for the cost of evaluation	



AIM					
Objective					
What will we do?	When?	Who will do it?	What partners do we need?	What resources do we need?	





A participatory planning approach provides an opportunity to:

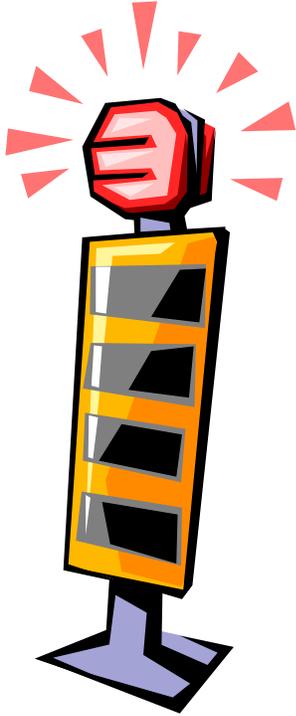
- Create enthusiasm for a common vision.
 - Tap the group's collective enthusiasm, intelligence, creativity and information.
- Elicit different perspectives on issues.
 - Create buy-in for a process of change and thereby reduce resistance to change.

Sometimes for the purposes of strategic planning, organisations make use of an external facilitator. This can be useful for a number of reasons:

- Add an impartial perspective to issues affecting participants
- Can act as an arbitrator should disagreements arise between stakeholders.
- Can facilitate the various steps of the planning process, thereby keeping the process going
- Usually have the skills to develop a positive team dynamic that taps creativity, and enthusiasm rather than conflict and negativity.



HOW ARE WE DOING?



Planning is only one part of the cycle of implementation in an organisation. Any plan needs to take into account the need to stop and reflect, to learn and to re-plan for the next implementation cycle (action).

In any project we need to make time to stop and reflect how we are doing in a process like a review. Before we even start the project or activity we need to decide what our outcomes are (what we want to achieve) and what are the things we will look for to see if we have been successful and achieved this (indicators of success). Then we can make sure that we are checking our progress during the project.

Indicators of success

As part of our plan we need to decide on the things we will look for to see if we have been successful. These are called **indicators**.

AIM	To develop life skills amongst at risk youth over a one-year period.				
Objective 1	Facilitate weekly life skills workshops for Imizamo Yethu High for up to 50 youth (13-16 years) during the 2007 school year				
What?	When?	Who?	Partners?	Resources?	Indicators
Organise youth focus groups to identify needs	January 2007	Facilitation team	None	Time and transport	Youth groups organised. (attendance registers; lists of needs written down)
Design workshops based on needs	Finish design by Feb 07	Facilitation team	Life Skills SA	Time, books	Workshop plan that reflects the needs of the young people
Produce workbooks	End March 07	Project manager	Printers	Stationery, paper, printing	Workbooks that are relevant and understandable
Run workshops	Weekly. April 07 – Nov 07	Facilitators	Schools, Arts alive	Art materials, paper, staff	Attendance at workshops, changed behaviour
Evaluate workshops	Jan & February 2008	Project manager	NGO evaluation trust	R10 000 for the cost of evaluation	Feedback received from participants and partners

Keeping track of progress

Now that we have a plan and a method of checking our success, we need to ensure that we stop regularly to review our plan, check our progress and to make sure that we catch problems before it is too late.

At the beginning of the year, it is helpful to develop a plan for how you will review and plan your work. Below is an example of one organisations planning and reflection calendar:



Case study / Example

Planning and learning Calendar for Sisonke Life Skills project

Month	Activity
January	Strategic review and annual planning Calendar planning as a team/ Departments Personal year planning with Supervisor
February	Team meetings
March	Team Meetings
April	Programme reflection
May	Team meeting
June	Mid-year Strategic Review
July	Team meetings

August	Programme reflection
September	Team meetings
October	Team Meetings
November	Programme evaluation
December	Annual reflection
	Staff retreat

It doesn't help to realise at the end of the year that there was a problem with your plan or to notice that something isn't working. Stopping to reflect, during regular evaluation, monitoring your programmes and asking for feedback will assist you with catching problems as they arise, when you still have a chance to do something about them.



Self-test

You should be able to:

- Explain what an indicator is
- Include relevant indicators for your project plan

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