

PROJECT COORDINATION

A paddle here, a paddle there—the canoe stays still.

-- Sierra Leone

He who does not mend his clothes soon will have none.

-- Niger

Overview

Anne Hope and Sally Timmel, in *Training for Transformation: A Handbook for Community Workers*, speak of a cycle through which healthy organizations pass in carrying out their work. They call this the "Commitment Cycle." The process they describe is one of cyclical evaluation:

1. Evaluation--of the present situation in relation to the future which the group desires
2. Recommendations--for the future development based on the evaluation
3. Decisions--on the best course for future development, based on the recommendations
4. Delegation--clearly giving responsibilities for the various tasks to be done, based on the decision
5. Implementation--actions taken, based on the decisions
6. Evaluation--of the action taken
7. Recommendations--based on the evaluation....

and so on. They point out that individuals' and groups' roles may change as the project moves through the cycle, though they remain interrelated. Project management involves the coordination of these processes and roles. If each step is not valued and acted on with the full participation of the group, inadequacy, frustration, alienation, competing interests, guilt, and shame can drain commitment away from the cause. Enabling and empowering leadership that encourages and acknowledges input to these steps promotes a more self-governing, less dependent membership.

Part of management and coordination is "nuts and bolts" planning and problem-solving. The activities in this unit will give participants a chance to practice three areas of program coordination.

Objectives

By the end of the module, participants will be able to:

- Use tools for coordinating the components of a multifaceted project.
- Describe the areas covered in line-item budgets.
- Develop appropriate scopes of work for contractors.

Activities

Program Planning and Coordination	60 minutes
Budgeting	40 minutes
Contracting Services	40 minutes
Estimated module length	2.3 hours

Materials

Newsprint and markers or chalk and board

Handouts

HO XI.1	Timeline
HO XI.2	Blank timeline worksheet
HO XI.3	Line item budget format
HO XI.4	Key Points Summary, Module XI

Training Aids

TA XI.1	Commitment Cycle
TA XI.2	Contracting Case Study

Activity
PROGRAM PLANNING AND COORDINATION

Purpose: Participants will be able to use tools for coordinating the components of a multifaceted project.

Format: Small group-Large group task

Suggested Time: 60 minutes

Materials: TA XI.1, *Training for Transformation* "Commitment Cycle"

HO XI.1, "Sample Timeline"

HO XI.2, Blank timeline worksheet

Team documents from "Carrying out a Program Activity" in Module X.

Preparation: None

Procedure:

- Refer to the task in Module X in which groups identified for five different program activities:
 - the activity
 - each task or step required
 - the responsible party or parties
 - the time frame for each task
 - resources needed

- Using the activities they planned in the last module, the group will now discuss the timing, people, and resources involved in each and come up with a viable project work plan. Participants should apply the following questions:
 1. Which groups are considered gatekeepers or otherwise have priority? For example, should the booklet for schoolgirls be completed and distributed before, after, or at the same time as the material for teachers?
 2. What orientations or other events are needed to introduce a material?
 3. What is the feasibility of pretesting two materials in the same month?
 4. Are there sufficient project team members to conduct a training and pretesting simultaneously?
 5. What seasonal community or weather events are occurring that would affect or be affected by program activities? (planting? FGM ceremony? harvest?)

- Share TA XI. 1, "Commitment Cycle," and review the steps as they apply to a communication for change project.

- Distribute and review HO XI.1, "Sample Timeline," with participants. Explain that they have 40 minutes to draft a timeline that includes all the steps of each of these activities. The different teams must work together to coordinate all the activities, taking into consideration available people and timing of events. Suggest that they have only 5 "regular" project staff at any given time, but that they can call in 1 or 2 "resource people" where needed.

- Regroup and review the team's plans. Discuss any problems that they might have encountered in their planning.

Key Points:

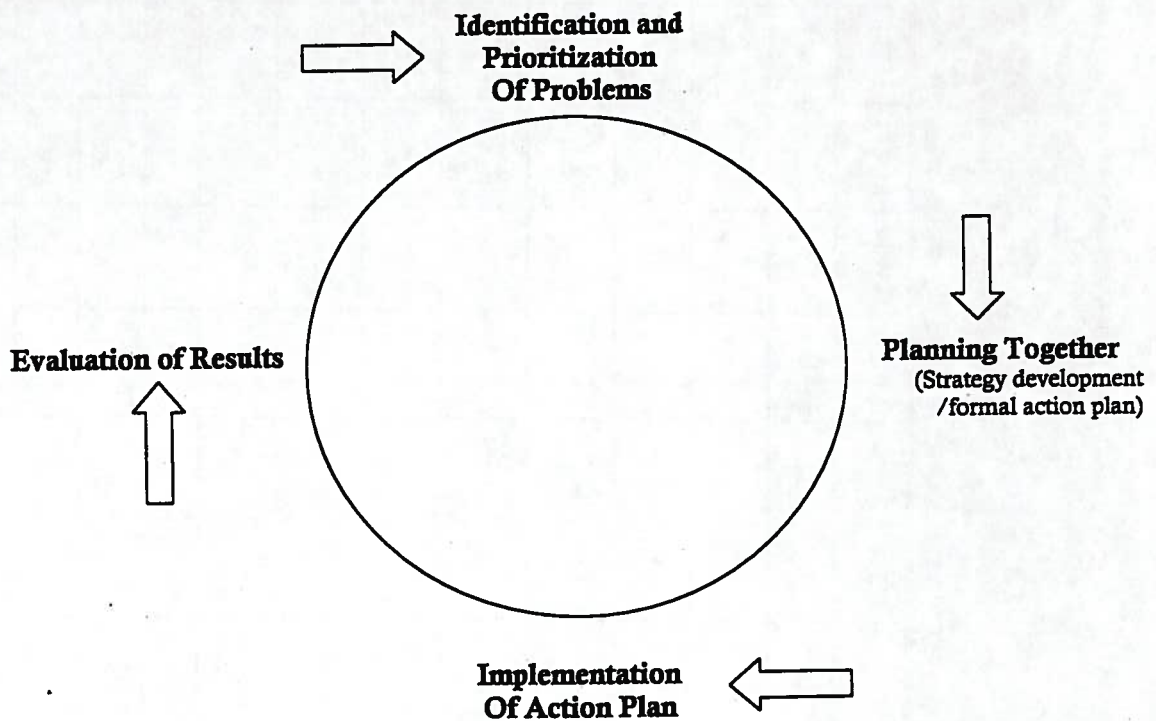
- Consider other institutional responsibilities/programs to avoid scheduling conflicts.
- Consider individual responsibilities--does the person with prime responsibility have ample time to carry out activity?
- Consider factors such as the rainy season and other outside forces which might influence schedule.
- Allow sufficient time--the work plan is a tool which helps budget time.

"COMMITMENT CYCLE"

from *Training for Transformation: A Handbook for Community Workers*

1. Evaluation--of the present situation in relation to the future which the group desires
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--Anne Hope and Sally Timmel



From *The Autodiagnosis: A Methodology to Facilitate Maternal and Neonatal Health Problem Identification and Prioritization in women's Groups in Rural Bolivia*

HO XI.1

Year

[illegible]

MODULE XI: Project Coordination

[illegible]

Activity
BUDGETING

Purpose: Participants will be able to describe the areas covered in line-item budgets.

Format: Mini-lecture, brainstorming

Suggested Time: 40 minutes

Materials: HO XI.3, "Line Item Budget Format"

Preparation: Make note of some of the activities planned in earlier sessions and outline a budget for a few.

Procedure:

- Explain that an important part of management is the ability to plan and anticipate needs. This includes anticipating program costs and allocating funds accordingly. Refer to HO XI.3, "Line Item Budget Format," and ask participants to refer to one of the activities planned in previous sessions, such as the development of a booklet for schoolgirls. Ask participants to brainstorm costs involved. (They need only give the line items, but they can hazard guesses about costs if they wish). Be sure to include all phases of developing the booklet.
- Provide another example that includes a training component or interpersonal activity. Again involve participants in a brainstorming exercise and write their comments on the board.

Key Points:

- A project budget is a management tool that provides a coordinator with a guide from which financial progress can be monitored.
- The project budget also is a tool which can be used by the coordinator to make programmatic and financial decisions regarding the project.
- It is helpful to record actual expenditures next to the budgeted amount for easy monitoring of project costs.

LINE ITEM BUDGET FORMAT

BUDGET FOR _____	
A. Personnel	
i. Staff time	
ii. Consultants/honorarium	
	Subtotal Personnel _____
B. Transport	
	Subtotal Transport _____
C. Other direct costs (photocopying, communication, hall rental)	
	Subtotal ODC _____
D. Supplies and equipment	
	Subtotal Supplies _____
	GRAND TOTAL _____

Activity
CONTRACTING SERVICES

Purpose: Participants will be able to develop appropriate scopes of work for contractors.

Format: Case study

Suggested Time: 40 minutes

Materials: TA XI.1, "Case Study"

Preparation: Read through the case study in advance

Procedure:

- Explain that you are going to read a case study to the group that will help them identify some of the pitfalls in contracting services for materials development. Ask participants to make notes as you read and think about what steps or information might have helped avoid the problem in the first place.
- Using the questions below and the tips found on TA XI.1, "Case Study," ask the group to propose a "scope of work" and contract for a graphic artist contracted to do materials development.

Questions for discussion:

1. What is the first thing the team could have done to hire an artist?
2. How could they have avoided the misunderstanding with the first artist?
3. What about the misunderstanding with the second?
4. How could they have avoided problems with the third?
5. What information did they need from the artists?
6. What information did they need to give the artists?

Key Points:

- Detailed scopes of work that address redrafts, time required, and acceptable final products avoid misunderstandings, ill will, and work delays.
- Both the contracting organization and the contracted person have obligations to uphold their commitments. If the contracting organization does not meet its schedule, contracted services may also be thrown off schedule.
- These principles and steps apply to providers of all sorts of contracted service and expertise, including trainers, researchers, artists, printers, and media outfits.

CASE STUDY**A CASE OF UNCLEAR EXPECTATIONS**

A project in Swaziland ran into problems keeping artists to work on materials development. They first hired an artist whose advertisement one of the team members had seen in the newspaper. The artist drafted one set of illustrations and asked for his money. He was asked to accompany the team for a round of pretesting, and when he heard the comments, he became very defensive and tried to explain to the pretesting participants what the drawings represented. Afterward, when he found out that he wouldn't be paid for the drawings as they were, he became very angry and wanted to take back his drafts. He was persuaded to leave the drawings, but asked to be paid and left the project. The team located another artist. They explained to him that he would have to re-draft the drawings after pretesting. He agreed. His drawings, however, were in a completely different style from those of the first artist. He lacked the same level of technical skill, though he was willing to make changes. After several attempts, the project staff decided to fire him and hire another artist. The third artist was very busy and it was several weeks before they could arrange for her to revise the drawings. Then the donor organization reviewed the art work and suggested the project team use photographs instead! By this time, the project was running over budget and team members were losing enthusiasm for their work.

CONTRACTING CASE STUDY**Tips:**

1. Determine whether your final product will be in the form of hand-drawn illustrations or photographs, or photo-illustrations.
2. Advertise and review the work of several artists.
3. Explain to candidates the materials development process that you employ, including pretesting, the necessity for redrafts and the number of redrafts expected.
4. Obtain rates based on the process you have described from top candidates.
5. Choose an artist.
6. Outline and discuss with the artist a schedule for materials pretesting and production.
7. Discuss other parts of the production process, such as layout, typesetting, and paste-up, and determine whether these are the responsibility of the illustrator, another graphic artist, or the printer.
8. Decide on a fair mode of payment: This is usually by each finished product (for example, 12 final illustrations at \$25 each).
9. Draft a scope of work that includes number of redrafts, pretesting dates, and conditions for acceptance of final work. The scope of work should outline contingency plans for any additional work required but not provisioned (rates for any additional drawings or extension beyond agreed dates).

KEYPOINTS SUMMARY, MODULE XI

PROGRAM PLANNING AND COORDINATION

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- Allow sufficient time--the work plan is a tool which helps budget time.

BUDGETING

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