

# Project Planning

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Developmental Organizations carry out a wide variety of programmes and projects. Experience reveals that a key condition for success is proper planning. This section, therefore, provides an introduction to some practical and straightforward guidelines and tools used in the project planning process. Since these guidelines are rather general, their purpose is to guide and stimulate thinking about project design and project planning rather than to provide a precise roadmap about how it is done.

Main points covered in this section are:

- Stages in the project cycle
- Elements of project conceptualization
- Elements of project planning
- Elements of the project proposal
- Elements of project monitoring, evaluation and reporting
  
- The need for project planning

Planning at some level is basic to all human activity, and is really applied common sense. It involves working out what you want to do and how you are going to do it. This applies whether you are preparing a straightforward and simple project or a long-term programme.

Planning involves identifying priority needs and opportunities, discussing and testing the various possible courses of action, choosing the most appropriate one (or ones), agreeing what you can expect to achieve, calculating the human and material resources needed to reach your objectives, anticipating possible problems and getting agreement among all concerned about clear targets and timetables for the work in view.

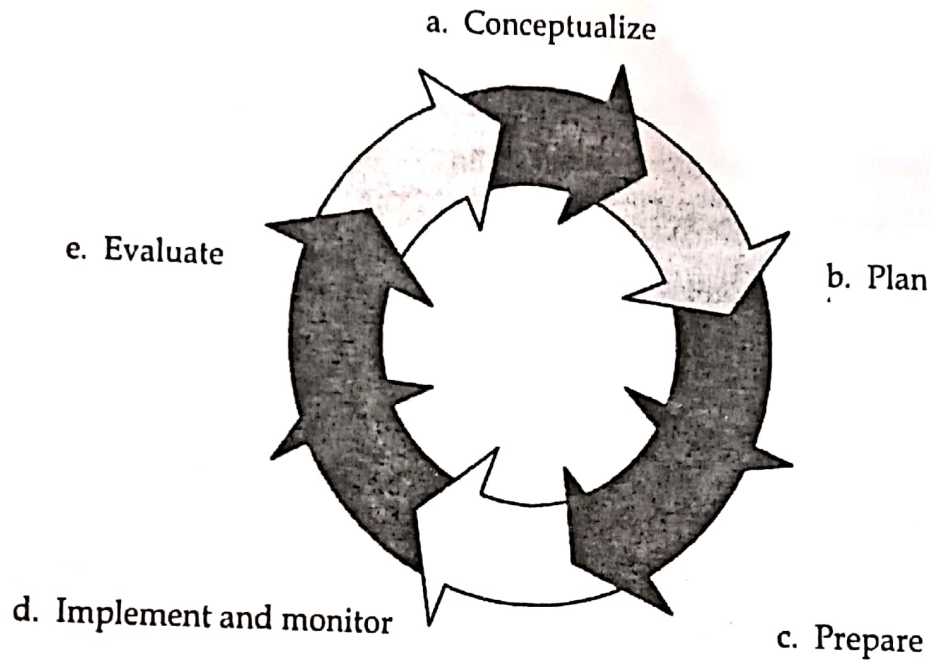
Good planning can increase your chance of success. It helps you analyze and assess present needs and future challenges. It gives you the means to test out various possibilities, think through the difficulties that might occur and prepare to overcome them. Good plans always allow for flexibility to adapt to changing circumstances.

- Beneficiaries and project management

Planning should never start and end in an office or committee meeting. Project planning should never be done alone or in isolation from those who have to implement the plans, or who will benefit from them. In fact, the most successful and sustainable projects make an effort to involve those who are to benefit—in all stages of project planning and implementation. It is important to find out what the beneficiaries really think about the problem and about how to address it.

- **Project planning**

Project planning is done to increase the likelihood that a project will be implemented efficiently, effectively and successfully. Project planning covers the first three stages of "the project management cycle." This cycle, describes the various stages for conceptualizing, planning, implementing and evaluating a project and recognizes that even when a project is finished, it may provide the starting point for a new one.



- Conceptualize project scope and objectives:**  
Explore the problem, identify priority needs, consider project solutions and evaluate organizational capacity.
- Plan the project:**  
Establish the project scope; clarify goals and objectives; choose the most appropriate course of action; identify the inputs and resources required in terms of: people, materials, time and money; develop a budget and draft a project plan.
- Prepare project proposal:**  
Present the project to important stakeholders, receive their feedback and secure the necessary material, human and financial resources.
- Implement the project:**  
Implement the project by following a work-plan and completing pre-determined tasks and activities. Monitor progress and adjust as necessary.



e. Evaluate the project:

Review what has happened, consider the value of what has been achieved, and learn from that experience in order to improve future project planning.

i. Conceptualize the project

- Write a problem statement

All project planning should begin with an analysis of the current situation and define the problem or opportunity that the project will seek to address. The success of a project will depend on how precisely and accurately the problem is articulated and understood. Again, the perspective of the beneficiaries is critical at this stage. The most important needs of the affected population will not always match those identified as most important by outsiders.

It will be very difficult to mobilize community interest and support in a project that the community sees as meeting secondary needs – or no needs at all. One should not assume that communities are homogeneous in their needs or desires. Different people in a community will have different and often conflicting needs and desires. A proposed project that seeks to benefit the most vulnerable, who is usually the poorest in a community, may sometimes threaten established interests and power structures. Similarly, a programme to empower women may threaten some of the men in a community.

Once the situational analysis is complete, project planners will want to articulate a problem statement that answers the following questions:

- What is the problem?
- When and how did the problem originate?
- What are the main needs generated by this problem?
- What is the significance of this problem?
- Why should anything be done about this problem?

Note: While these questions refer to "problems," it is important to remember that the discussion that follows applies equally, if not more importantly, to "opportunities."

- Brainstorm possible project solutions

Once a problem has been defined, project planners need to consider the many possible responses. Brainstorming is one simple method for exploring needs and considering possible problem solutions. This method brings together a group of people and asks them to share their ideas on any one or a number of questions – ranging from problems to solutions. Their ideas are all listed on a blackboard or on large sheets of paper, and then looked at one by one.

Brainstorming involves two stages: the creative stage (i.e. generation of ideas or listing of needs) and the critical stage (i.e. evaluation and analysis of these ideas). During the creative

process, participants provide "raw" ideas as they think of them. These ideas can be practical, idealistic or wildly creative. These ideas should not be critiqued or analyzed during this first stage—they should just be accepted and listed. After all ideas are listed, they can be further developed or combined.

During the critical stage, the group should evaluate the ideas and attempt to identify the rationale of every idea, even if the whole idea seems far-fetched. Individuals can be asked to explain or defend their idea by fielding questions from others in the group. During this stage, organizational capacities also need to be evaluated. The Developmental Organization will need to ask itself whether it can really do anything about the priority problem that has been identified. Questions to help the organization explore the match between proposed solutions and organizational capacities include:

- Do we have, or can we get, the appropriate staff and volunteers?
- Are we already too heavily committed with other activities?
- Is the area too remote for proper supervision?

Even with financial and personnel resources available through other organizations and donors, local needs are always likely to be greater than available resources. There must be realism about the actual capacity of any organization to plan and manage new projects. Sometimes an important need cannot be met until the organization has further developed its operating capacity and the skills of its staff. Therefore, each organization should have an overall Development Plan based on its general assessment of priorities and opportunities.

If you accept that your organization does not have the capacity to start a particular project even though it is urgently needed, you may have to plan a more modest activity in an area of lower priority for the time being. Planning strategy involves deciding what to do and also what not to attempt.

After all ideas are understood and discussed, and organizational capacities considered, the group should arrive at consensus on the three most important ideas or a combination of ideas for project implementation. From this shorter list, the group should select the one idea that they are best suited to implement.

- **Determine project scope and objectives**

After selecting one solution to implement, project planners need to clearly establish the scope of the proposed project. A statement of the project scope should state broadly the general purpose and goals of the project. This broad statement should be followed by more specific objectives that will be met.

- **Goals and objectives**

**Goals** are broad statements that describe the overall purpose of the project. **Objectives** are much more concrete. Remember to use the SMART guidelines for writing objectives.



These are:

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

After the project scope, goals and objectives have been defined, the next step is to develop a more detailed project description and strategy that answers the following questions:

- What aspects of the problem will this project address? What aspects won't it address?
- Who will benefit from this project?
- What needs will be met?
- What will the beneficiaries receive?
- What is expected of the beneficiaries?
- What is the general strategy that this project will pursue?
- What is the expected outcome resulting from the project?
- What is the methodology for implementation for the project and each project component?

#### b. Plan the project

Once the project scope, goals, and general strategy have been established, the specific objectives need to be converted into planning steps and the details of project implementation need to be determined. Many tools exist to assist planners with this process. They include:

- Project planning checklists
- Project work plans
- Gantt (bar) charts
- Logical Framework Analyses
- Budgets
- Project planning checklists

The simplest planning tool is the project planning checklist. It is only a bit more sophisticated than checklists we might prepare every day, such as a shopping list. In the same way, a project planning checklist can be generated which identifies everything that