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Welcome to Session 3 of the NCDA Grant Writing & Project Management Course

We will get started at 2:30 PM GMT

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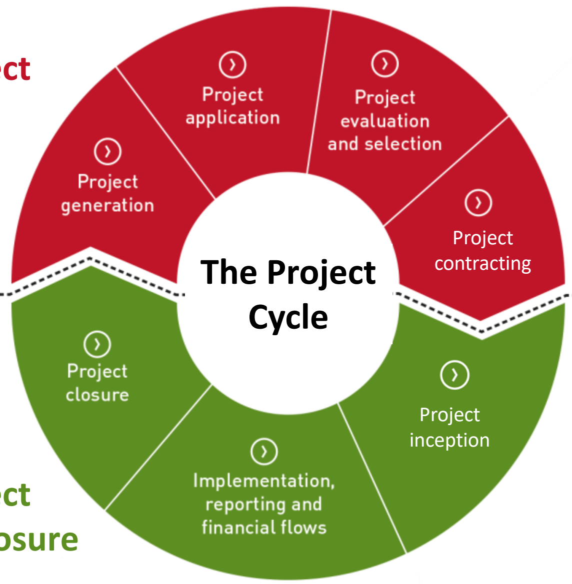
Course overview

Session 1: Project Development (Grant Writing)

PROJECT DEVELOPMENT



PROJECT IMPLEMENTATION

Session 2: Project Planning

Session 3: Project Delivery and Closure

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Recap of Sessions 1 & 2

Project Development (Grant Writing) and Planning

- Understanding the evaluation process
- Generating ideas and partnerships
- Communicating your ideas clearly in the proposal text:
  - Applicant and Organisation Information
  - Project Summary
  - Project Description (setting targets, outputs, activities)
- Making a work plan
- Creating a budget
- Building a team

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Today's session

Session 3: Project Delivery and Closure

- Breaking up the work
- Communicating with your team
- Monitoring & evaluating work progress and finances
- Reporting to funders
- Closing a project and ensuring sustainability

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Your experiences

- What have been your biggest challenges so far in **managing** your advocacy projects?
- Please put your answers in the chat ☺

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Breaking up the work

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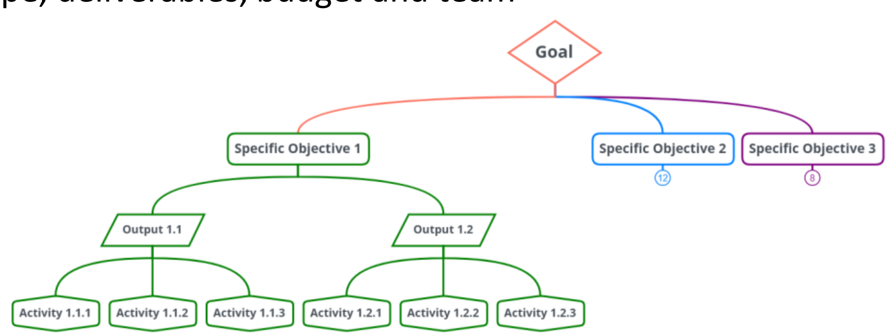
Breaking up the work

- **Remember from Session 1:** Projects are broken up into Objectives (aka Outcomes) with associated Outputs and Activities
- Each Activity is its own piece of work – and should have a defined scope, deliverables, budget and team



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Breaking up the work

Level	Details
Outcome 1	Increase in-school consumption of fresh fruits and vegetables by 25% in children aged 5–15 in the greater Kampala area by August 2023
Output 1.1	150 school kitchen staff in the target area trained in healthy and nutritious cooking
Activity 1.1.1	**Establish or maintain school kitchens in the target area**

- Activity details include **What**, **How**, **Who**, **Where** and **When**
- How can we elaborate on these details from the proposal now that we're actually delivering the work?

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Breaking up the work

- Use a **Terms of Reference** (**ToR**)
- Also known as a Working Agreement
- This document covers responsibilities and deadlines for an activity (like Gantt charts) but also important background thinking (purpose, context), scope, deliverables and resources

- **ToRs are a tool to help a manager delegate work to others**

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Breaking up the work

ToR sections:

- **Purpose:** What the activity should achieve
- **Roles and responsibilities:** Who participates and in what way
- **Context:** The background – what led to this activity being planned in this way/at this time?
- **Scope:** The expectations and boundaries for the work (i.e. both what is in scope and out of scope)
- **Deliverables:** What is expected to be produced and when
- **Resources:** The level of effort (days) for the work and any other material resources

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Breaking up the work

- Let's have a look at an example

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Breaking up the work

- ToRs take time to develop – but save time in the long run
- Steps:
  - Write the ToR (consider co-writing with team)
  - Put a trusted member of your team in charge of implementing that ToR
  - Have them report to you regularly with updates

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Exercise

- You will now be sent to a Breakout Room
- Please refer to the material titled "**ScriptoriaExercises**"

Exercise 1: Drafting a Terms of Reference

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Breaking up the work

- Another way to define the work is through defining clear **Roles and Responsibilities** of each staff member
- You can use **job descriptions** to help

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Breaking up the work

Job descriptions

- For each staff member you will hire, (co-)create a job description stating their role and the key responsibilities associated with the role

- **Job description: Teacher**
  - **Role:** The education of their students
  - **Responsibilities:**
    - ?

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Breaking up the work

- **Job description: Teacher**
  - **Role:** The education of their students
  - **Responsibilities:**
    - Teach daily classes
    - Mark homework
    - Produce report cards
    - Meet with parents
    - etc

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Breaking up the work

- **Job description: Team Leader**
  - **Role:** To deliver the project on time and to budget
  - **Responsibilities:**
    - Ensure that the staff required to deliver project goals are in place
    - Ensure there is no overspend or underspend in budgets
    - Ensure key work items are delivered on schedule
    - Ensure systems are in place to produce quality work
    - Ensure that annual reports are sent to the funder

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Breaking up the work

- **ToRs** show the roles and responsibilities of all staff for one job
- **Job descriptions** define the roles and responsibilities of one staff member across the entire project

- How can we bring the information about roles and responsibilities for all jobs and all staff together?

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Breaking up the work

RACIQ Charts

- These are a great tool to help managers track the roles and responsibilities of **all** team members on **all** jobs
- These are commonly used in corporate organisations but are very useful for general project management

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Breaking up the work

- Using this system, each complex piece of work has a clear set of responsibilities for team members
- **RACIQ:**
  - Responsible
  - Accountable
  - Consulted
  - Informed
  - Quality Reviewer

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Breaking up the work

- **Responsible:** Carries out a piece of work, e.g. responsible for doing something
- **Accountable:** Makes high-level decisions and drives the job forwards – there can only be one Accountable
- **Consulted:** Provides input/advice when asked
- **Informed:** Receives updates on interim progress in the job including decisions and actions
- **Quality Reviewer:** Designs and carry out ongoing quality checks to ensure that the work is on track and of high quality

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Breaking up the work

Responsibility Assignment Matrix - RACI Chart

	Jeff	Michael	Reto	YOU	Alex	Anna	Bill	Cindy	Felix	Fred	Hans	John	Livio	Luc	Marco	Paul	Peter	Sue	Ted	Tim
Planning / Schedule	R	A	I	C					C											Q
Risk Management		I	I	Q						A								R		
Quality Management			R	C						R										A
Procurement				R		Q				R								R		A
1. Specifications Listing								A		R								R		R
2. Site Requirements		C	A	R	Q						R									
3. Call for Tenders				Q	A	R	C				R							R		
4. Budget Approval				A	Q					R							R			R
5. Contract Negotiations			A		Q	R	R											R		

* R – Responsible (works on), A – Accountable, C – Consulted, I – Informed, Q – Quality Reviewer

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Breaking up the work

Teams need to consider the following:

- Does it make sense for one staff member to play many roles across one activity, or the same role across many activities?
- How should the work be split/delegated?
- Who can the responsible staff members consult for help?

- The transparency of who has what responsibility for the work helps manage team communication

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Exercise

- You will now be sent to a Breakout Room
- Please refer to the material titled “**ScriptoriaExercises**”

Exercise 2: Assigning RACIQ roles

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Communicating with your team

Emails, meetings

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Team communication

- Choosing the right channel is important:
  - Emails are best for simple updates and delegation
  - Complex issues are more quickly resolved with a meeting or call

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Team communication

Use clear subject lines

Poor

- Subject: Team meeting

Better

- Subject: Agenda – Monthly UoMalawi/UoBirmingham meeting 20/01/23

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Informal communication

Use the "TO" address line and the "CC" address line properly

- Designate the TO address line in your project emails as being for those expected to act on the email
- Use the CC address line for those who only need to be informed that work is ongoing (e.g. managers or collaborators)

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Team communication

Ask your team to copy you out

- Team members often copy people in to "reply all" emails without thinking
- If you have delegated a piece of work for someone else to manage, let the team know that you trust them and don't need to be CCed on further emails like this
- Ask instead for weekly or monthly updates at key points (milestones) in the future

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Team communication

Use separate emails to deal with separate subjects

- Write a separate email for each different piece of work being addressed and send that only to those specifically involved (with a detailed subject line!)
- This keeps emails short and to the point

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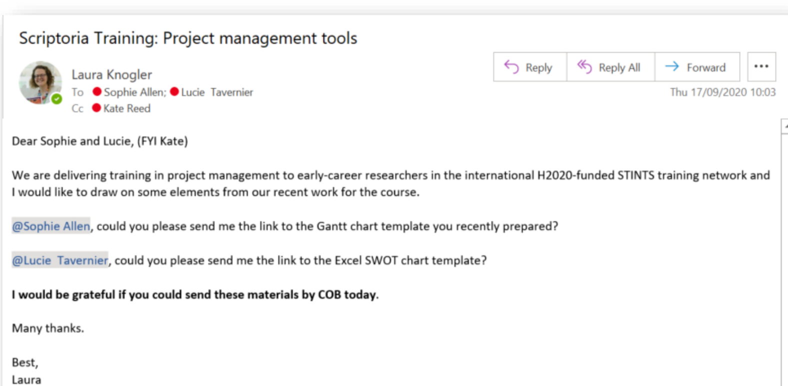
Team communication

Use paragraphing, @ for naming, and bold for key deadlines


Scriptoria Training: Project management tools

Laura Knogler
To Sophie Allen; Lucie Tavernier
Cc Kate Reed

Reply | Reply All | Forward

Thu 17/09/2020 10:03

Dear Sophie and Lucie, (FYI Kate)

We are delivering training in project management to early-career researchers in the international H2020-funded STINTS training network and I would like to draw on some elements from our recent work for the course.

@Sophie Allen, could you please send me the link to the Gantt chart template you recently prepared?

@Lucie Tavernier, could you please send me the link to the Excel SWOT chart template?

I would be grateful if you could send these materials by COB today.

Many thanks.

Best,
Laura

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Team communication

- How can we make better use of the time spent at meetings?

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Team communication

Be prepared

- If you are invited to a meeting, spend a short time (it might only be 5 minutes) reviewing what you know about the subject of the meeting before you attend
- Consider questions you might want answered in that meeting

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Team communication

Have an agenda

- If you called the meeting then you should send an agenda or task someone else with doing it
- Even if you are just meeting with one person, you should draw up an informal agenda in the email ("I'd like to discuss X, Y and Z")

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Team communication

Start on time and end on time

- If you set a meeting for 30 minutes, you need to ensure that the agenda only contains 30 minutes of material
- Ensure that all materials are ready when the meeting begins so time isn't wasted
- Assign times to agenda items and stick to them
    1. Updates from survey team [10 mins]
    2. Updates from policy team [10 mins]
    3. Quarterly budget report from PM [10 mins]

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Team communication

Maintain focus

- Be very firm about keeping the meeting on topic at all times
- People need to stick to the agenda items under discussion
- If your meeting is getting off-topic, then make an action point to schedule a different meeting on that other topic and return to your agenda

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Team communication

Record meeting notes centrally

- Have notes stored centrally so that everyone can easily come back to them and review them
  - E.g. OneNote, Evernote, Google Drive
- Include a link to the notes in the meeting invitation
- Task one person in a meeting with capturing meeting notes and action points

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Team communication

Record action items

- When you finish discussing each agenda item, make sure that action points (with initials and deadlines) are recorded
  - ❑ APLK: Add summary of survey results to this report by CoB 20/01/23
  - ❑ APKR: Update policy section in this report by CoB 20/01/23
  - ❑ APNB: Prepare budget as PDF and store in this folder by CoB 22/01/23

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Monitoring & evaluating (M&E)

Work progress and finances

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M&E

- We need to monitor and evaluate the performance of the project as well as that of the finances

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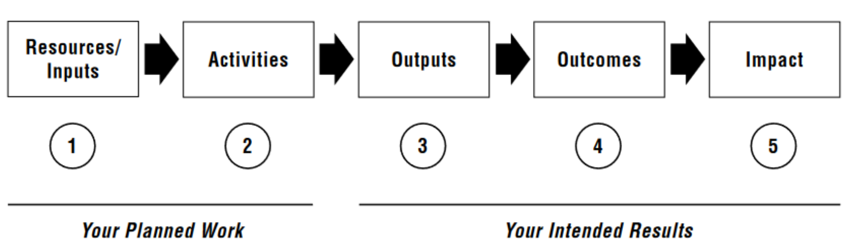
M&E – Project Targets

- **An M&E plan:** a description of how the activities, outputs and outcomes will be monitored during the course of the project to evaluate the overall success (impact) of the work



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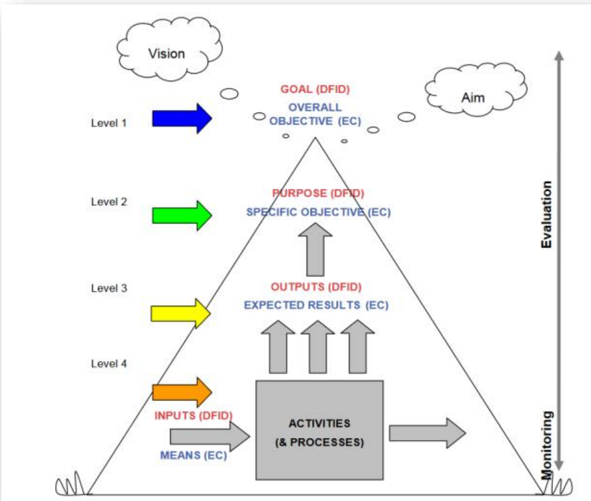
M&E – Project Targets



- The basic principle is **"Plan downwards – Think upwards!"**

From the [BOND logframe guide]

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M&E – Project Targets

- Projects often have a dedicated M&E team member whose sole job is to track progress towards all targets and collect or document evidence of this progress
- For large projects this is really important, as it provides evidence for external review teams who can decide the fate of the project

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M&E – Project Targets

- Data collection is key!
- Describe how data will be collected to monitor project progress for activities, outputs and outcomes
  - What kind of data (evidence)?
  - How often should it be evaluated?
  - Can it be verified and/or quality assured?
- **Remember:** if you have set SMART objectives, you should be able to measure them easily

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M&E – Project Targets

Objective 1. Increase in-school consumption of fresh fruits and vegetables by 25% in children aged 5–15 in the greater Kampala area by August 2023

- What kind of data (evidence)?
- How often should it be evaluated?
- Can it be verified and/or quality assured?

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M&E – Project Targets

Objective 1. Increase in-school consumption of fresh fruits and vegetables by 25% in children aged 5–15 in the greater Kampala area by August 2023

- What kind of data (evidence)?
  - Purchase of fruit and vegetables as percentage of food budget
  - Proportion of fruits and vegetables in school meals
  - Self-reported fruit and vegetable consumption by school children
- How often should it be evaluated?
  - Monthly as a report submitted by each school
- Can it be verified and/or quality assured?
  - Independent verification of the monthly data for first two months by project team

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M&E – Project Targets

- **Tip:** Use a central, cloud-based data management system to gather your M&E data and hold it centrally
  - E.g. SharePoint, OneDrive, Google Drive

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M&E – Project Targets

- Monitoring methods should be chosen according to the targets that you have set and may include the following:
  - **Recording:** documenting meetings, correspondence or conversations with target audiences and their responses
  - **Tracking:** keeping track of when your key messages or briefing notes are used by elected officials, other key influencers, or the media
  - **Surveys and interviews:** determining the impact your actions have had on stakeholders and the recognition they have received
  - **Media monitoring:** keeping track of coverage of your topic in the media

From the WHO Cancer Control Policy and Advocacy Guide

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M&E – Project Targets

- For advocacy objectives, the evidence to collect will be both quantitative and qualitative
- **Quantitative** e.g. statistics or trends that indicate a change over time
- **Qualitative** e.g. case studies, stories, opinions, survey questionnaires

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M&E – Project Targets

Sample advocacy **activities** and measurement **indicators**

Activities, interim outcomes, goals, impacts	Definition	Indicators
ACTIVITIES		
Digital or Internet-based media/social media	Using technologies such as email, websites, blogs, podcasts, text messages, Facebook or Twitter to reach a large audience and enable fast communication	• A new website or web pages developed • Number and frequency of electronic messages sent • Number of list subscribers
Earned media	Pitching the print, broadcast or digital media to get visibility for an issue with specific audiences	• Number of outreach attempts to reporters • Number of press releases developed and distributed • Number of editorial board meetings held
Media partnerships	Getting a media company to agree to promote a cause through its communications channels and programming	• Number and types of media partnerships developed • Number and types of distribution outlets accessed through media partnerships
Coalition and network building	Unifying advocacy voices by bringing together individuals, groups or organizations that agree on a particular issue or goal	• Number of coalition members • Types of constituencies represented in the coalition • Number of coalition meetings held and attendance
Briefings/ presentations	Making an advocacy case in person through one-on-one or group meetings	• Number of briefings or presentations held • Types of audiences reached through briefings or presentations • Number of individuals attending briefings and presentations

From UNICEF's Monitoring and Evaluating Advocacy guide

See guide for example output and outcome indicators

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M&E – Project Targets

- **Baseline and endline assessments**
  - Think about collecting baseline data for your outcomes (changes) so that you can compare with interim and endline data to show progress
- **Evaluation**
  - If applicable, describe other planned assessments to take place during the project and explain how they will be conducted and by whom (internally/externally)

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M&E – Project Targets

The eight steps of Strategic Advocacy Planning

NCD Alliance
ADVOCACY INSTITUTE

What should be measured in advocacy?

- **Advocacy gains:** Foundational level outcomes that are essential to advocacy, but wouldn't be considered wins, including but not limited to agenda setting and building support for policy changes (e.g., issue framing and prioritisation of policy options, development and dissemination of policy messages, recruitment of new champions).
- **Advocacy wins:** Mainly policy adoption as the final advocacy outcome (legislative, judicial, or administrative).

What are performance indicators or targets?

- Variables with characteristics of quality, quantity, and time
- Measure changes in a health situation directly or indirectly
- Help assess the extent to which your objectives are achieved
- Provide a basis for developing plans for improvement
- **Examples:** Number and type of supportive statements made by policymakers; number of spokespeople trained; number of media hits; increased level of funding in government budget for your issue; number of people with lived experience meaningfully involved in decision-making

What are some monitoring and evaluation tips?[14]

- Make sure your advocacy objectives are SMART (see Step 2 - Select priority issues, goals, and objectives)
- Collect evidence along the way to assess progress against selected indicators
- Refine the strategy as you go along, based on progress achieved
- Build time into your advocacy plan for a mid-campaign review, assessing results of activities, revising your strategy, and adapting your approaches if needed
- Conduct an end-of-campaign review to evaluate activities from start to finish
- As you monitor progress, keep focused on your overall goal and objectives
- Consider working with new partners or changing target decision-makers or tactics if you are not making progress

Tip:

- Measure advocacy **gains** as well as advocacy **wins**

From the 2022 NCDA Practical Guide to Strategic Advocacy

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M&E – Project Targets

M&E Resource List:

- 2022 NCDA Practical Guide to Strategic Advocacy
- UNICEF's Monitoring and Evaluating Advocacy guide
- WHO Cancer Control Policy and Advocacy Guide
- Child Friendly Activity Cards – Monitoring & Evaluation Form
- Children's Resilience Programme – Data Collection Tool
- IASC Common Monitoring and Evaluation Framework for Mental Health and Psychosocial Support Programmes in Emergency Settings
- IFRC Monitoring and evaluation framework for psychosocial support interventions – toolbox, indicator guide, and guidance note
- Monitoring and Evaluation for MHPSS in COVID-19
- The co-production of research between academics, NGOs and communities in humanitarian response: A practice guide

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M&E – Project Targets

- **Logical Framework Analysis** (**logframe** or **results framework**): a more detailed/advanced approach to M&E
- Logframes may be required by the funder and use a specific template with agreed-upon annual milestones at the Activity, Output and Outcome levels (key performance indicators; KPIs) and an end-of-project/programme Impact target
- Logframes are complex and could easily be the subject of their own week-long course!

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M&E – Project Targets

Logframe Resource List:

- BOND logframe guide
- World Bank logframe handbook
- W.K. Kellogg Foundation Logic Model Development Guide
- IFRC example logframe
- Fanta Project guide and example
- K4Health guide and example

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M&E - Budgets

Monitoring budgets

- You also need to closely monitor project finances to ensure you're not overspending (or underspending!)

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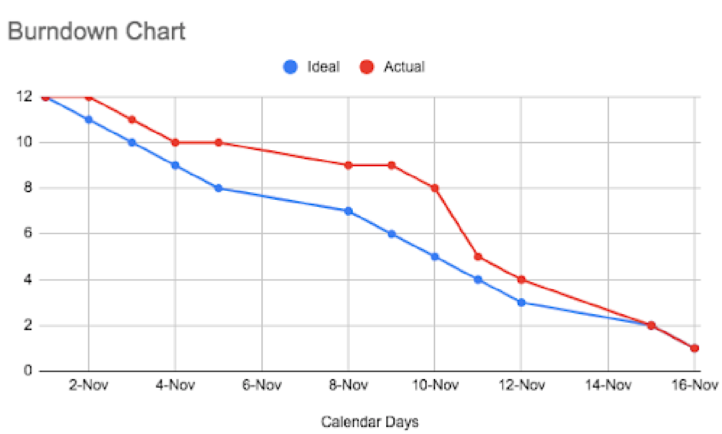
M&E - Budgets

- **Tip:** establish a target monthly "burndown rate"



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M&E - Budgets

- Burndown targets can be by person (e.g. working days), by activity, by project, or some combination of these
- Also consider your cross-cutting project costs

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M&E - Budgets

- **Example burndown:** Running costs

Ideal burndown rate	Evidence to collect	Measurement frequency	Reporting
$3,500/month	Utility bills; regularly recurring purchases (e.g. office supplies, vehicle fuel)	Weekly in the first two months of the project; monthly thereafter	Detailed breakdown of costs for monthly meeting with finance and management team to review spend and update budget for coming months; Summary budget line items in annual written donor report

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M&E - Budgets

- Budgets are part of project M&E but may require support from a financial expert and/or specialised financial software
- E.g. Sage, QuickBooks, etc

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Exercise

- You will now be sent to a Breakout Room
- Please refer to the material titled "**ScriptoriaExercises**"

Exercise 3: Monitoring and evaluation

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Reporting to funders

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Reporting

Typical funder reports

- **Semi-annual progress report:** A 3–5 page document focusing on implementation of activities, major achievements, problems faced and solutions found
- **Budget report:** Quarterly report detailing amounts received, expenditure to date, as well as balance in the account
- **Project completion report:** A 15–20 page final report providing an analysis of achievement of project objectives, design, impact and sustainability, as well as positive and negative lessons learnt

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Reporting

- **Tip:** Produce quarterly (internal) reports to make annual reporting easier
- Use a template report that teams can fill directly

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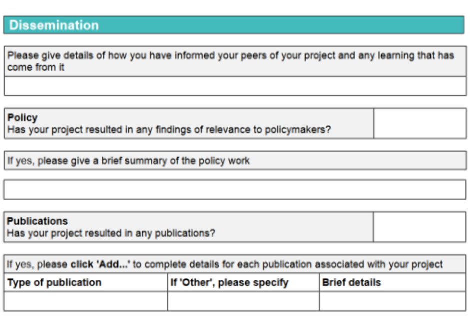
Reporting

- Example funder template excerpt and team document notes



Dissemination

Please give details of how you have informed your peers of your project and any learning that has come from it

Policy Has your project resulted in any findings of relevance to policymakers?	

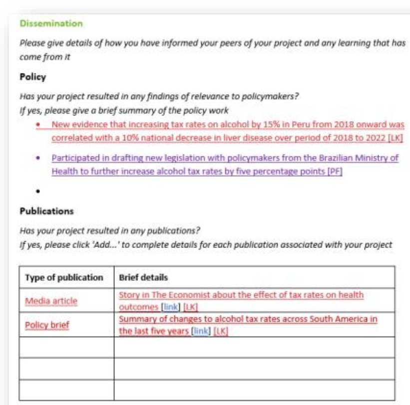
If yes, please give a brief summary of the policy work

Publications Has your project resulted in any publications?	

If yes, please click **'Add...'** to complete details for each publication associated with your project

Type of publication	If 'Other', please specify	Brief details

[Wellcome Public Engagement Grant report template]



Dissemination

Please give details of how you have informed your peers of your project and any learning that has come from it

Policy

Has your project resulted in any findings of relevance to policymakers?
If yes, please give a brief summary of the policy work

- New evidence that increasing tax rates on alcohol by 15% in Peru from 2018 onward was correlated with a 10% national decrease in liver disease over period of 2018 to 2022 [LK]
- Participated in drafting new legislation with policymakers from the Brazilian Ministry of Health to further increase alcohol tax rates by five percentage points [PF]
-

Publications

Has your project resulted in any publications?
If yes, please click 'Add...' to complete details for each publication associated with your project

Type of publication	Brief details
Media article	Story in The Economist about the effect of tax rates on health outcomes [link] [LK]
Policy brief	Summary of changes to alcohol tax rates across South America in the last five years [link] [LK]

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Reporting

- Visual illustrations, using a red, amber, green (RAG) traffic light system are effective ways of summarizing results

Status
Behind
On Track
Completed
Not begun

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Reporting

- **Tip:** use a summary RAG table to track internal (monthly) progress and report on annual progress to funders

Work Area	Deliverable	% Complete	Deadline	Status	Responsible	Evidence
Data Management System	Data Management Plan	80	20/01/2023	On Track	LK	DMP_v0.6
	Intranet with structured data folders	20	28/02/2023	Behind	PB	Mindmap of proposed structure
	Public-facing data dashboard	-	20/05/2023	Not begun	LK	
Communications Campaign and Products	Communications Strategy	100	31/11/2022	Completed	CJ	Comms_Strategy_v1.0
	Website (Phase 1)	10	30/01/2023	Behind	PB	Draft website text
	International Media Articles	20	28/04/2023	On Track	CJ	Article 1; Podcast 1
	Website (Phase 2)	-	30/08/2023	Not begun	PB	
	Social media campaign	10	30/08/2023	On Track	CJ	Twitter profile

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Closing a project and ensuring sustainability

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Closure and sustainability

- Planning for the closure of a large multi-year project will need several months of planning
- You'll need to make some final decisions to tie up loose ends with e.g. unfinished work, draft analysis, transfer of knowledge etc

- How can you ensure the sustainability and legacy of the team's work?

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Closure and sustainability

1. Phase out appropriately

- Make concrete plans for completing activities, including the planned timeframe
- Describe how to ensure that beneficiaries won't be adversely affected when the project is completed

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Closure and sustainability

2. Continue project activities where possible

- Is it possible for any of the main activities to continue?
- If so, create a detailed handover plan
- **Tip:** If the activities will continue to feed into results for your project, make a plan to keep tracking these

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Closure and sustainability

3. Maintain valuable resources

- If any major equipment or other material/digital resources were procured or created during the project, describe how they will be maintained after the project closes
- A common example here is a project website or social media account – how will it be maintained?

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Closure and sustainability

4. Create a strong dissemination plan

- For internal knowledge management:
  - Protocols, notes and analyses stored centrally
  - Data clearly organized and labelled
  - Lessons learned are documented and discussed
  - Outgoing staff train incoming staff members
  - Key emails, documents, data, notes or other information are saved by the individual – as you may no longer have access to this when the project is complete

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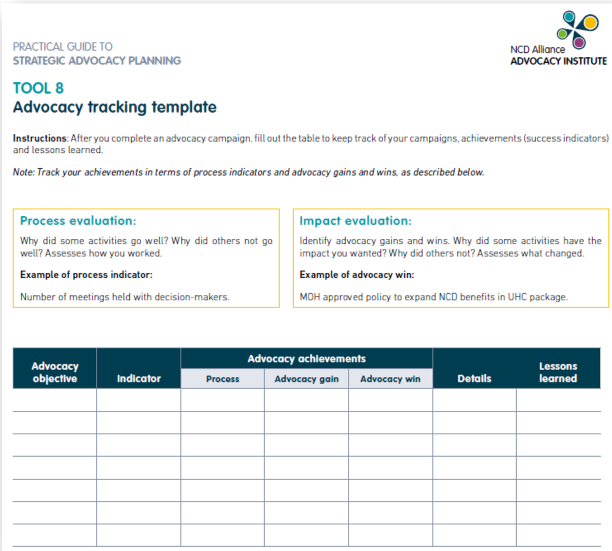
Closure and sustainability


PRACTICAL GUIDE TO
STRATEGIC ADVOCACY PLANNING

NCD Alliance
ADVOCACY INSTITUTE

TOOL 8
Advocacy tracking template

Instructions: After you complete an advocacy campaign, fill out the table to keep track of your campaigns, achievements (success indicators) and lessons learned.

Note: Track your achievements in terms of process indicators and advocacy gains and wins, as described below.

Process evaluation:
Why did some activities go well? Why did others not go well? Assesses how you worked.
Example of process indicator:
Number of meetings held with decision-makers.

Impact evaluation:
Identify advocacy gains and wins. Why did some activities have the impact you wanted? Why did others not? Assesses what changed.
Example of advocacy win:
MOH approved policy to expand NCD benefits in UHC package.

Advocacy objective	Indicator	Advocacy achievements			Details	Lessons learned
		Process	Advocacy gain	Advocacy win		

Tip:

- Use a template to record details of your advocacy efforts as you go for better knowledge sharing at project closure

From the 2022 NCDA Practical Guide to Strategic Advocacy

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4. Create a strong dissemination plan

- For external dissemination:
  - Describe how the experiences of the project incl. outputs and outcomes will be gathered, systematised, and passed on
  - Put key data, documents, and learning in the public domain
  - Share evidence of project success and impact with stakeholders through conference presentations and policy briefs

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5. Plan early for your next grant/project

- Set aside regular time to look for new funding/collaboration opportunities, particularly in the last year of the project
- Timing is critical – having continuous funding means that you can retain highly-skilled team members that might otherwise leave when this project is done

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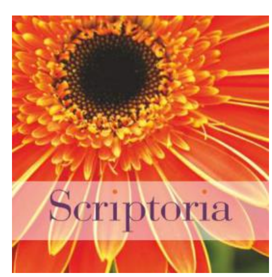
End of course

Please answer the poll questions based on today's session and the overall course



Want to know more?

- Email us at training@scriptoria.co.uk
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