Organisational Capacity Toolkit

Ante Raeda:
Pioneering work
in civic engagement

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Acknowledgements

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Institute for War and Peace Reporting (IWPR)

IWPR is a non-governmental organisation that gives voice to people at the frontlines of conflict and transition to help them drive change. Founded in 1992, IWPR now works in more than two dozen countries and territories in Europe, Asia, Africa, Latin America, and the Middle East. IWPR supports activists, human and women's rights defenders, reporters, and citizen journalists in many countries in conflict, crisis, and transition around the world. We contribute to peace and good governance by strengthening the ability of media and civil society to speak out. This is accomplished by training, mentoring, and providing platforms, building up the institutional capacity of media and civic groups, and working with independent, and official partners to remove barriers to free expression, robust public debate, and citizen engagement.

IWPR Champions Women's Rights: IWPR works to champion issues of women's rights around the globe while supporting female civic activists and reporters in challenging environments. IWPR's work around the world supports and strengthens emerging women's organisations and promotes women's active participation. Our civil society and media partners not only highlight inequalities and abuses, but also celebrate the achievements of women driving change in their own societies. Much of IWPR's work focuses on giving voice to those who might not otherwise be heard. Targeted programming promotes the voices of women in conflict zones by training female journalists and providing them with effective media platforms and fora for women in conflict-divided regions providing a vital space for women participation in peace-building, political, and economic processes. Furthermore, women human rights defenders stay safe in often hostile environments thanks to IWPR programming on physical and digital safety awareness.

IWPR in the Middle East and North Africa (MENA): IWPR has been working in the MENA region for over a decade. IWPR's work helps build a vibrant and independent media, active civic and community groups, and democratic institutions across the MENA region. Initiatives in the region have strengthened journalist and civil society institutions in a variety of ways, from supporting legal and structural reform around policies, including freedom of information and women's rights, and political participation to real time management and programme implementation support to build sustainable organisations. IWPR has offices and maintains a presence in Tunisia, Libya, Egypt, Lebanon, Iraq, Syria, and Turkey in addition to running regional programmes across the entire Middle East and North Africa region.

Alumni of IWPR's programming have assumed leading roles in government, civil society, academia, the media, and (in some cases) in the non-violent opposition. Others, forced to flee their countries, are advocating and working in other ways in support of their principles and objectives, helping to plan transitions, and organising support for refugees.

Binda Consulting International Ltd. (BCI)

Binda Consulting International (BCI) is a European-based political and international development consultancy providing analysis, training, and research with expertise in programme design, public opinion research, women's political participation, political strategy, crisis communication, and organisational training.

Established in 2014, its senior consultants have deep experience in the field of international democracy and development. Combining decades of work in challenging political environments, BCI has the right mix of talent and understanding to deliver expert advice and action. BCI is a company that is nimble enough to respond quickly to the needs of clients. Its global network of consultants provides bespoke talent and expertise to projects and programmes.

BCI's senior consultants have worked to develop the capacity of political actors in emerging democracies and traditional societies to better respond to the challenges inherent in dramatic change. Having lived and worked in conflict and post-conflict environments, BCI consultants understand the obstacles to reconciliation within and among communities.

Ante Raeda: Pioneering work in civic engagement

Through the U.K. Government-funded **«Ante Raeda»** (You are a Pioneer) project, IWPR is equipping women's civil society organisations to improve the status of women in Libya through organisational strengthening and effective policy advocacy. Based on lessons learned from IWPR's current and previous programming in Libya, the MENA region and beyond, the **«Ante Raeda»** project is partnering with CSOs throughout Libya that are working on women's empowerment and gender equality. **«Ante Raeda»** aims to enhance the operational capacity, sustainability, and impact of these CSOs—strengthening them organisationally, improving capacity and lobbying, and empowering them to improve the lives and visibility of Libyan women.

In the first phase of the programme, IWPR, partnering with BCI, undertook a scoping exercise, which allowed the team to analyse the state of CSOs representing women's interests in Libya. Through more than 70 interviews across Libya with CSO leaders and community members the team assessed women's CSOs on their organisational strength and health; their strategic planning and operational ability; and their networks, coalitions, and advocacy capacity to advance women's rights and government accountability to women. IWPR's Libyan partners include both established and emerging women's groups and women-led CSOs, as well as other CSOs working on a range of gender-related issues, operating throughout Libya. These assessments, based on information provided directly from the CSOs, identified areas of targeted support to help the CSOs increase their impact regarding women's rights in Libya. At the end of Phase I of the programme, 20 CSOs participated in capacity development workshops to improve their understanding of organisational and project management.

In phase two of **«Ante Raeda»**, IWPR awarded small grants to ten Libyan CSOs to implement women-focused activities that advance or advocate for legal reform, women's political participation, women's economic empowerment, and raise awareness on gender-based violence. To address challenges faced by CSO partners and to provide them with the necessary tools and skills to promote the improvement of women's rights in the region, BCI provided capacity support to the organisations through workshops, regular mentoring, and coaching at an organisational and strategic level.

All capacity building efforts taking place throughout the life of this project use the data collected during the initial scoping exercise enabling IWPR to tailor its support to meet the specific needs of individual CSOs.

Why this toolkit?

BCI experts determined that the subject matters covered in this **toolkit** represent fundamental organisational conditions for nascent civil society or community-based organisations. The information contained within this document is a guide to building foundations. This **toolkit** is not a comprehensive or definitive work on all the processes and procedures available to organisations, but a simple guide to the essentials. This **toolkit** complements organisational trainings held for participants in the **«Ante Raeda»** programme; compiling modules developed for small to medium size organisations and providing guidance where gaps may exist in internal policies, procedures, or skills sets.

For whom is the toolkit?

Many topics addressed by this **toolkit** apply to trainers as well as managers and NGO leaders who play a role in supervising or implementing projects. This **toolkit** can also contribute to the professional development of an NGO's in-house staff.

This **toolkit** is a relevant resource to help organise and streamline your capacity-building efforts, both internal and external. The **toolkit** presents guidance to organisations in their day-to-day management and implementation of projects, in addition to evaluating the impact of projects on beneficiaries, stakeholders, and partners.

A variety of groups can benefit from this **toolkit**, including:

- NGO leaders, directors, and managers.
- Internal trainers and projects team members.
- Administrative staff, officers, and coordinators.
- Freelance trainers and consultants.
- Anyone interested in developing his/her knowledge in the area of civil society.

How is the toolkit organised?

Chapter ONE explores volunteer-based organisations; motivations of volunteers, recruitment, and management of volunteers.

Chapter TWO examines ways in which organisations can raise money for their administrative, operating, and programmatic costs. It also focuses on understanding various donor communities.

Chapter THREE explores essential planning in which every organisation should engage, defining who you are, what you do, and what you want to achieve.

Chapter FOUR looks at organisational policies and procedures guide members of the team as well as external audiences.

Chapter FIVE focus on project design and implementation; step-by-step.

Chapter SIX concentrates on monitoring and evaluation; an area often ignored by NGOs, but crucial to understanding the impact of the organisation's work.

Chapter SEVEN explores organisational communication including: identifying and understanding audiences, internal and external communication, communicating with donors, and media.

How to use this toolkit?

The **toolkit** is designed to be read like a book or consulted as a reference and can be utilised as a whole or as stand-alone chapters, depending on the needs of the organisation and/or trainer. The table of contents at the beginning can help you quickly find the specific information you need. Many of the chapters provide detailed, step-by-step instructions, tips, and the templates are available in English and Arabic for customisation by the NGO and/or trainer.

It can be a technical tool for trainers and managers who would like to build the internal capacity of their organisations or learner-centred methods in a simplified and straightforward manner. However, it is not intended to replace any training-of-trainer courses and instead provides background information and sets standards.

Because every training situation is different and each training programme must address the unique needs of its participants, trainers, and administrators using this manual are encouraged to keep referring to specific learner needs and adapt information provided here as required.

Introduction

This **toolkit** was developed to complement the materials, workshops, and discussions held during the first and second phase of the Institute for War and Peace Reporting (IWPR) programme **«Ante Raeda»** (You are a Pioneer). The **«Ante Raeda»** programme was designed to strengthen the internal capacities of Libyan civil society organisations to enable them to better plan, design programmes and projects, and to manage organisations

This document accompanies videos prepared on the same topics and presentations found on the IWPR YouTube Channel. Civil society organisations can use this material to generate ideas for their teams and in mentoring other organisations.

While there are many organisational planning and development resources available, this **toolkit** is most useful for new organisations or those who want to strengthen their approach to community-based programming.

The **toolkit** contains the following chapters:

1. Working with Volunteers;
2. Fundraising and «Resource-Raising»;
3. Strategic Planning;
4. Policies and Procedures;
5. Project Design Process;
6. Monitoring and Evaluation (M&E);
7. Communication Planning.

Notes:

Working with Volunteers
CHAPTER I

In this section, we explore volunteer-based organisations. Specifically, we examine:

1. What motivates people to volunteer.
2. How to find volunteers.
3. Managing volunteers.

1. What Motivates People to Volunteer?

People give their support and their time to organisations and community projects for many different reasons. As a leader in your organisation, it is important to recognise what motivates people to volunteer.

Social—Most of us like to be around other people. In rural or remote communities there may be limited opportunities for people to socialise. In larger population centres, volunteering with an organisation gives people a sense of belonging to the community.

Creating a vibrant social atmosphere is essential for volunteer-based organisations. Allow time for people to chat and connect on a social level. Ensure the environment, in which your volunteer team is working, allows for appropriate social interaction, be attentive to volunteers, so they get the social opportunities they are seeking. Sometimes shy people need extra help with introductions and getting involved. Be proactive in building a healthy social environment for your volunteer team.

Personal—Some people may engage because of a friend or family member. Personal connections are important motivators for volunteers. Make an effort to reach out to these newcomers. Help them also to become invested in your organisation because if they do not feel they belong, or if their friend stops coming, they may lose the motivation to be involved.

As a leader in a volunteer-based group, you could have the friends co-chair a committee, or provide them with a shared responsibility. Because volunteers are a valuable resource, it is worthwhile doing what you can to keep people engaged and working together.

Professional—We might like to learn new skills, put into practice our professional abilities, or add to our curriculum vitae (résumé). Young people, in particular, who have little practical participation in the job market often join organisations to build their skills, making them more attractive to potential employers. Providing young people with professional experience can be a powerful recruitment marketing tool for your organisation.

Trained professionals often volunteer with organisations where they can apply their expertise. These types of volunteers are particularly valuable for medical or health-focused communi-

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ty-based organisations (CBOs). Health professionals will often volunteer their time to support organisations working on health issues in their community. However, the same is true for people in any professional group; legal, engineering, and so on.

Values—Some people support CBOs and or their causes because organisations support their moral or religious values. Those, for example, who feel a moral obligation to address poverty might volunteer with an organisation working to lift families out of poverty. Similarly, those with deeply held values or convictions related to charity, human dignity, for example, may seek out or be receptive to groups whose actions reflect their values.

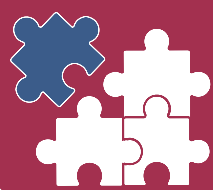
Appealing to potential volunteers' values is a powerful recruiting tool. It presents them with an opportunity to fulfil a moral conviction.

Making a change—Some people may be frustrated with a particular circumstance or condition and want the opportunity to make a difference in bringing about change. Neighbourhood clean-up initiatives are excellent examples of how people join an organisation to bring about change. Often people will join actions or want to take part in specific projects even though they may not have an immediate attachment to the organisation itself. Regardless, the volunteer effort should be welcomed, appreciated, and engaged. Volunteer team leaders can assess what additional motivation, if any, they can use to appeal to keep the issue-focused volunteer engaged.

Community—Many people enjoy being more connected to their communities and join community-based organisations for that reason. CBOs that focus on local environmental, cultural or health projects commonly attract community-minded volunteers. For this category of volunteers, the motivation is being connected to and working for their local community. Often local businesses and other organisations volunteer resources and people for community-focused events or projects.

Leaders of volunteer-led organisations should understand the variety of reasons people volunteer their time. They use this understanding to create conditions within their group or projects that appeal to the range of motivations; it also allows for more effective recruiting strategies and plans.

Challenge



Learn from your volunteers; speak to and survey volunteers who are either currently with your organisation or have volunteered at some point.

First, thank them for their volunteerism. Second, ask the volunteers what they enjoyed about your organisation. Ask them what motivated them to work with your team in the first place. Ask them if they got what they wanted out of the experience. Also, ask how the experience could have been better. Finally, thank them again!

Gather your leadership team and discuss the answers you obtained from your survey. Are there common factors that encourage volunteers within your organisation? Are there conditions you can improve to increase the motivation of your volunteers?

You might decide to incorporate some of your findings in your public information materials, or volunteer recruitment initiatives. However, ultimately, it is essential to know why people are attracted to your organisation and how to make that experience fulfilling to them.

2. Finding Volunteers

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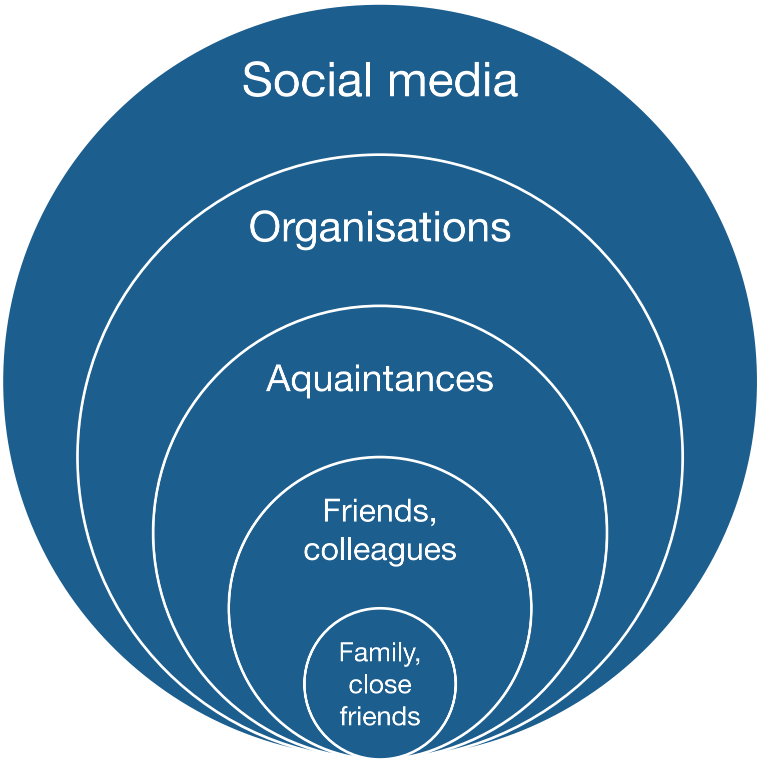

Family and close friends are most likely to volunteer; they are the most accessible pool of volunteers from which you can recruit. However, the total number of volunteers in this group is limited and may be smaller than you need.

The graphic above shows that recruiting volunteers is like creating ripples in a pond; start with family and close friends, have them identify friends that might also be interested, including professional or work colleagues. Make sure to have all volunteers that join your organisation help in the recruiting of others.

Approach other organisations and offer to share volunteers or resources. Shared volunteers or resources are critical particularly during periods when your organisation is busy on a specific event or project. You may offer, for example, to help another community-based group distribute clothing during Ramadan, while they may volunteer to help with your summer camp for internally displaced youth.

Social media provides the opportunity to reach many more people than you and your team may be able to reach as individuals. Social media is limiting, however, because it is mostly one-way communication. However, It may result in attracting volunteers of whom you are not aware and gives you additional recruiting potential.

Getting ready to recruit

- Assign one person to be a «Volunteer Coordinator». This person provides volunteers and potential volunteers with a key point of contact within your organisation.
- Make a plan of **WHOM** to approach and **HOW** to contact them (in person, phone, online).
- Before recruiting, set up a system for recording volunteers' contact information and following up with them. A simple spreadsheet enables you to track your volunteers, but be sure to update your list continually.
- Create a recruitment pitch and make sure all volunteers can deliver it.

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The recruitment pitch

A pitch is a concise outline that explains why people should invest their time (or money) in your organisation or activities. It should be:

- Short.
- Simple language.
- Relevant to people's lives.
- Persuasive.
- State the organisation's message—the difference you will make.
- A call for a specific action.

Here are the elements of a strong pitch; A good pitch is short—not more than 4-5 sentences—and uses simple language. It lays out the difference you are trying to make (your goal), and how your work will have an impact.

In other words, the recruitment pitch is a lot like your organisational message to your target audiences—it just ends in a different call to action—«**Join us** to make this happen.»

Make sure your expectations of volunteers are clear. Be specific in telling them what they can do for the organisation, but be sensitive with what they are comfortable.

Make recruiting a regular practice

Volunteer dependent organisations should always be recruiting and, while one person may be a point of contact as a volunteer coordinator or manager, everyone in the organisation should be involved in recruitment!

- Ask volunteers to help identify and recruit new volunteers.
- Use events as recruiting opportunities.
- Make it easy for people to find out about volunteering—you can have online sign-up forms or clickable links for volunteers.
- Be sure to respond quickly to any request from a potential volunteer—that added attention will make them feel you value their time.
- Ask supporters and people who take an interest in your work to volunteer some time; they are, obviously, drawn to your organisation.
- Track volunteers with a database, and invite them to events or appreciation opportunities regularly—even if their labour is not needed.

A database should be designed to give you essential information about your volunteer team; how they came to the group, what skills do they have, how much time can they commit and so on.

For example:

Name	Phone	E-Mail	Social Media	Address
Mrs Fatima	123456789	fatima@mymail.com	WhatsApp, Viber, @fatima0987	123 Blue Street

Municipality	Reliable/ not reliable	Occupation	Skills	Introduced to us by
Village Blue	Very reliable	Nurse	Medical, sewing, cooking	She saw us working at the playground, and spoke with coordinator

Time of day they are available	has car / needs transportation	Project of ours they have worked on
Shift worker, check with her	She has car, and willing to give others a ride	• Playground clean up • Story time at orphanage

REMEMBER

Volunteer dependent organisations are **always** recruiting.
People are your most **valuable** resource.
Make their **experience** rewarding.
Say **thank you**.

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3. Managing Volunteers

Volunteers are not employees and cannot be compelled to undertake tasks they might not like. They are donating their time and abilities for any number of reasons we discussed above. If they feel their time and effort is not appreciated or wasted, they most likely will not continue to volunteer. Like employees, volunteers need leadership and direction. They will pull together as a team if they understand what and why they are doing. The organisation's leadership has to affirm their value and demonstrate gratitude for voluntary efforts.

Happy, productive volunteers

1. Make them feel **welcome**.
2. Give them a **specific task**; check that they're able to do it.
3. **Check on them** regularly.
4. **Thank** them.
5. **Recognise** their work.
6. **Invite** them to come back and help again.
7. Give them more **responsibility**.

TIP!

If your organisation works on sensitive issues or with vulnerable stakeholders, make sure you train and supervise your volunteers. You should provide volunteers with clear guidelines of the limits of their responsibilities. Well-meaning volunteers might try to solve problems or offer advice by themselves, for which they are not qualified—causing more harm than good!

Good volunteers should be invited to return and bring friends or family

You should welcome first-time volunteers. Make an effort to introduce them to the team; make them feel special and part of an active group. Put them at ease, partner them with someone who can show them how to be of use to the organisation.

Give volunteers specific tasks and show them how to do it. Check back with them periodically to make sure they are doing well and enjoying their time.

Everybody wants to feel their efforts are appreciated—be sure to thank vol-

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unteers and publicly recognise their important contribution.

Recognise when volunteers are ready to take on more responsibility and provide outstanding volunteers with increasing responsibility. These people have the potential of assuming leadership positions within your organisation.

Always ask volunteers to return. Follow up with valuable volunteers even when nothing is happening. Create social opportunities in between organisational events or projects to maintain the team dynamic.

Challenge

Build a volunteer database

Before building your database, consider **data protection and right to privacy laws** that might be in place in your region. You may need to obtain a volunteer's permission (in writing or by email) to include her or his details in a database. You may want to share with them your data protection policy—a document that outlines how data is stored, who has access to it, and how it is protected. A sample template is appended to this **toolkit**.

1. Decide on the essential information you will need to gather about your volunteers. For example; name, contact information, skills, academic qualifications, interests, availability (similar to the example above).
2. Create an email mailing list or group chat.
3. Send a request to your volunteers to put their contact information in your organisation's database, let them know how you will use, handle and protect their information (data), and ask if you can send them regular email updates on the activities of your organisation.
4. If people do not want you to include their information in your database (it does not necessarily mean they do not want to volunteer), respect their wishes and let them know how they can follow the activities of your group, and tell them you look forward to seeing them in the future.

Tip!

When emailing a group, be aware that some people may not want others to know their email address. Put group email addresses in the «bcc:» field and your email address in the «to:» field.

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Fundraising & "Resource-raising"
CHAPTER II

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In this section, we examine ways in which organisations can raise money for their administrative and operating costs. We will look at:

1. Techniques.
2. Fundraising opportunities.
3. Sources of revenue.
4. The donor community.

All organisations need resources. For community-based organisations, raising resources can be difficult because the group may be entirely made up of volunteers with limited time to commit. Time is a valuable resource.

«Resources» is an all-encompassing word describing things that we use—this includes, money, time, human labour, and physical space. Understanding what you have helps you know what you need and allows you to plan your resource-raising strategy.

Sit with your team and systematically map out what you have, what you need, and how to get what you need.

Step 1

Conduct an inventory of what you already have. Do you have access to free space where you can have team meetings, or organise workshops? Do you have computers and other necessary technology?

Step 2

Given what you have, identify what it is you want to do—are you planning a neighbourhood cleaning, or providing orphans with winter clothing—what specific resources will you need to accomplish your objectives?

Step 3

Identify which resources you need and begin making a plan to get them. While it is always easier to plan events or implement a project when you have lots of money, it is also possible to conduct activities with in-kind contributions. Rather than giving money, for example, a printing shop might donate the design and printing of awareness materials; pamphlets, posters, or books. A local hotel might donate the use of a meeting room for a workshop.

Step 4

In short—implement! You have identified your available resources, what you need, and made a plan. Remember, however, it does take time and human resources to reach out to potential donors, planning fundraising events, and having the appropriate accounting and reporting procedures in place.

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Fundraising

Ask—Very few people or organisations will give you money because they think you need it. You need to ask—but be smart about asking for funding.

Make sure you understand the legal framework governing organisations like yours and what is allowed when raising money. Many governments, for good reasons and bad, put limitations on how and where organisations can raise money or solicit donations. Good reasons include; tax regimes, controlling and preventing money laundering, and issues related to protecting sovereignty and national security.

Unfortunately, some governments also use donor restrictions and laws to limit the ability of community-based organisations to act in opposition to corrupt or anti-democratic political interests. However, regardless of the motives of those placing conditions on donations to non-governmental or community-based organisations it is the law and violating the law can have severe consequences.

Developing a fundraising strategy requires some planning and clear communication. Consider the following strategic points:

- **Ask yourselves:** Who are potential donors? What motivates them to give? What are their priorities and how does our work reflect that? How and where do we engage them? What do they expect in return, and can we deliver that?
- **Be prepared:** research potential donors. These may be national or international government funding agencies, businesses, members of the community, as well as friends and family.

- **Develop a profile of potential donors:** what appeals to them? What motivates them to give money to organisations like yours?
- **Prepare to have a conversation with potential donors**—and do not be disappointed if you do not get funding, be respectful and thank the potential donor for listening to you. The conversation should include:
    - A description of the project.
    - How money raised will be used.
    - What the donor receives in return (for example, public mention of their generosity, a tax receipt, etc.).
- **Ensure you have financial accountability measures** in place demonstrating, to donors, responsible and transparent use of their support. Not only may you be subject to annual audits by law, but donors need assurances that money provided for something, is spent on that thing.

Organisations typically have two types of expenditures or expenses; core costs, and project-specific costs. Core costs include items like salaries of staff who are not being paid by project funding, capital expenses like office space or transportation, utilities, and so on. These are expenses incurred by the organisation whether they have project funding or not.

Many organisations with core costs will fundraise to maintain their staff, offices, or other routine expenses. Other organisations operate entirely on project-tied funding—which means that when the project concludes, all project-funded expenses, including staff, office expenses, end as well.

The Scouting movement Girl Guides is well-known in North America for selling cookies. The revenue generated by sales goes directly to operational and programme costs. Some countries explicitly prohibit not-for-profit organisations from selling products or services. However, in other countries, the prohibition is in recording a «profit;» it is, in these cases, permissible to sell products and services as long as all revenue generated is expended as either capital, operational, or programme costs.

We briefly examine how organisations can generate funds. It is not an exhaustive list but provides some ideas to get you started. Paradoxically, charitable, and not-for-profit fundraising is big business in many parts of the world. Some companies and individuals sell their services to raise money, and fundraising strategies are ever evolving. However, organisations can generate revenue with regular fundraising to maintain paid staff and offices ensuring that programming can continue.

For example, a health-focused organisation may plan a regular fundraising dinner with speakers and charge an entrance fee, as well as sell merchandise and ask for donations. The organisation should budget for organisational expenses; use of office, communication, promotional material, and so on from the money raised. The money raised may be enough to not only fund specific projects and programmes but to pay (a portion or all) for staff and office costs.

There is nothing wrong with raising money for staff and organisational expenses, but you need to be honest about doing that. Be prepared to explain what portion of funding is going directly to programs, and their beneficiaries, and what proportion is going to administrative costs. Some humanitarian organisations have been criticised in the past for high allocations of donations to administrative costs, rather than to specific crises or beneficiaries. It is an international standard today for organisations that rely on donations to publish the percentage breakdown of where funding goes.

Family and Friends

It is relatively easy to ask family and friends to donate to a cause or project on which you are working. Have everyone in your organisation reach out to their immediate circle and ask for support in the form of either resources (of-

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fice or meeting space, transportation, etc.) or money.

Membership or subscription fees

Many organisations, particularly academic, research or think tank institutions charge subscription fees for reports, data, or information. These are mostly products marketed to specific audiences. Some others even charge membership dues or fees from their activists. If an organisation charges a membership fee it is important that members obtain some privilege; for example, the ability to attend annual meetings and participate in leadership selection or policy direction.

Events

Often, organisations will hold a lecture, arrange cultural events, or organise a bazaar. They may charge an entry fee to the lecture to pay for the guest speaker's travel or time. Bazaars allow for artisans or issue-based organisations to purchase space (tables or booths) or time for engaging with visitors. Quite often the revenue raised is intended solely to offset the cost of the event, though raising additional revenue to support the activities of organisations is also a possibility.

Events are great ways of offering something to the community, particularly in small, rural, or remote regions. They also allow for multi-marketing or fundraising. For example, if an organisation sponsors a lecture on public health, they might even have a table set up selling food or beverage, merchandise, promote upcoming events or appeal for donations. Here are some ideas that might work for your organisation:

1. **Pot luck dinner**—members of your organisation prepare food and host a meal for which diners purchase tickets. These events work particularly well in multicultural or diverse communities where the differences in cuisine provide attractive choices.
2. **Art purchases or auction**—Organisations can partner with artists or artisans to sell or auction artworks or artisanal products, or provide access to events hosted by your group.
3. **Debate or Lecture**—these are excellent opportunities to provide a profile to your organisation, they can be media opportunities, and allow you to engage with community members. Nominal entrance fees can be charged to offset costs of venue, refreshments, and speaker. The substance of the dialogue can be packaged into a newsletter or added to social media.
4. **Social or professional networking event**—particularly in rural or remote regions, people will pay a nominal fee to attend a social or professional networking event.
5. **Cultural Entertainment or sporting events**—Cultural and sporting events are great opportunities to bring communities together. Organisers can charge entrance fees and solicit sponsorships. Activities could include inter-community sports, marathons, walking tours, musical productions, comedy nights, movies, books, or poetry readings, and so on. Organisations are becoming increasingly creative with the events they stage, but remember that putting on an event takes much work by several people.
6. **Awards or recognition ceremony**—Awards ceremonies are creative ways of engaging business, professional, special interests, and governmental communities. Sponsors will get involved if the event targets audiences with whom they are particularly interested.

Merchandising

Selling merchandise that ties into the objectives of an organisation is often employed as a fundraising strategy. Animal rights organisations, for example, sell plush animal toys to both raise awareness and provide products to supporters. Many organisations sell or distribute clothing or small items. It is important to remember that merchandising is not a for-profit business;

it raises revenue that supports programs or operational costs of community-based organisations.

Fee for service

Organisations, particularly those that develop skills (IT, language, entrepreneurial, industrial) will often charge participants or sponsors fees for providing training. Usually, the fees charged recover all or a portion of employing trainers, space, and any supplies or equipment needed. However, it is also possible to generate additional funding to offset organisational costs.

Appeal

An appeal is simply asking for money or resources. Charitable organisations working on poverty alleviation, for example, might ask members of their community for clothing or foodstuffs. Organisations can have members approach business people asking for support and donations.

Appeals usually relate to specific campaigns or projects, but organisations should also plan budgets that include administrative and capital costs associated with project-specific requests. These additional costs must be realistic and transparent. For example, your fundraising goal and budget may consist of a 5% administration fee from all collected donations, because you will need to engage accountants or bookkeepers to register donations and prepare financial documentation. You may incur bank charges for cashing cheques or depositing foreign currency.

Sponsorship/In Kind

Most large corporations have an ethical obligation to be supportive of communities in which they operate, and will have formal «corporate social responsibility» programmes. For example, an oil company working in the Sirte basin may contribute annually to sporting events or infrastructure, or pay for academic opportunities, or provide loans or small business support. Community-based organisations should make efforts to know the corporate social responsibility people in, and policies of, corporations working in their region.

Small and medium-sized businesses often support local groups or projects because they care about healthy and vibrant communities. They also see it as a way of getting positive publicity in the community. While charity and giving is an integral part of certain religious and traditional beliefs and promoting your giving might be viewed as crude, it is vital that organisations find ways of recognising the generosity and support of small and medium businesses and corporations without offending public attitudes.

Often businesses and institutions are unable to provide cash donations, but they can donate their employees time, or provide in-kind contributions of office or meeting space, material goods, or professional services. A sole practitioner lawyer, for example, may not have money to donate, but her or his free legal services could be even more valuable to an organisation than cash. Just like asking for money for your important projects, programmes, and organisations, do not be afraid to ask people for in-kind donations.

Online Fundraising

The internet provides organisations with the ability to reach much wider audiences and is cost effective. However, in transitional countries where banking facilities or internet infrastructure is weak, raising money online may be more difficult. Also, many people lack confidence in providing their personal and financial details online, particularly in transitional countries. However, the fact remains that many organisations around the world have some online fundraising capability.

Online fundraising has to be made as easy as possible for people to give money. The more clicks or steps it takes for a person to donate matters; the more time and difficulty involved,

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the less likely they will proceed to the final donation. Providing multiple payment options is also important; not everyone who wants to give has a credit card, so provide information for mailing cheques, or banking information for electronic transfer, or even where they can give in person.

Fundraising Tips!

- Be prepared when you ask for money.
- Be clear about where the donation will go.
- Employ creativity in designing fundraising activities, but make sure what you do is legal.
- Always thank donors to your fundraising initiatives.
- Make fundraising a routine element of your organisation's activities.

International Donors

Important!

As with any fundraising, make certain you understand the legal limitations to accepting international donations, grants or funding.

There are different categories of international donors:

Governmental Development Agencies—These are the international development arms of governments. They support international development in areas that conform to a country's policy priority areas. For Example, the government of the United Kingdom of Great Britain and Northern Ireland may have a development policy to address access to potable (drinkable) water in the Maghreb. Its international development agency, the Department for International Development (DFID), would then work with government officials in Morocco (as an example) to agree on priority potable water development needs. In this example, DFID would then seek proposals from both governmental and non-governmental organisations and actors to improve access to potable water.

There are three essential points about this category of international donor. First, they fund projects in a given country with agreement from the host country government (in our example above the Kingdom of Morocco would be the host country). Second, the policy priorities of the agency's government influence the focus of funding, and these priorities can change rapidly if a new government or set of circumstances presents itself. Third, these development agencies are accountable to their governments and national legislatures and are, therefore, required to have rigorous and transparent procedures and reporting regimes in place.

It is imperative that organisations wishing to secure international development funding pay close attention to the priorities of those governments and agreements with host country governments. Most international development agencies are transparent about their funding priorities and geographic focus; most often publishing this information on their websites or government pages.

International Non-Governmental Organisations (INGO) and Institutions— The Institute for War and Peace Reporting is an INGO that sometimes has granting or funding ability; it depends on the donor support they have. So for example, DFID might accept a proposal from and fund IWPR to engage media in Morocco in a clean water awareness campaign. IWPR may negotiate to provide 20 Moroccan civil society organisations with small grants to involve local communities in discussions about accessible potable water. While IWPR is not a grant (funder) giving organisation ordinarily, there are times when it has the mandate to provide grants to local partners.

Similarly, various agencies of the United Nations often partner with organisations and provide funding in close coordination with host country governments. International Institutions such as the World Bank Group and the African Development Bank are also focused on international development and frequently provide funding for projects and programs; however these usually involve the active participation of, and direction by, the host country government. For grant seeking organisations, it is worthwhile researching the programmes and priorities of international institutions because they often seek out local partners.

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Sometimes donors oblige INGOs to include local partners; so if you are contacted to enter a partnership, make sure you understand what the INGO expects from the partnership and that you are comfortable with the collaboration. Do not be afraid to negotiate—they need you.

Foundations

Foundations are established by people, groups, or organisations that want focused attention on specific subjects, issues, or areas. Some are grant-making foundations that solicit projects from local partners working on particular topics. For example, the UK-based Children's Investment Fund Foundation (CIFF) funds poverty alleviation groups working, principally in sub-Saharan Africa.

Working with Donors

Identify and engage with the donor community

Conduct research and identify potential donors both domestically and internationally. Search internet databases to identify international development agencies, speak with other organisations, ask members of diplomatic missions or international NGO staff. Establish contact in person or remotely. Even ask for a meeting to introduce yourself and your organisation—you may not need funding or are not prepared to submit a proposal, but you should get to know the donor community and let it get to know you.

Most development agencies will have contact information on their websites,

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and diplomatic missions (embassies and consulates) are also approachable. Send an email invitation to meet, or provide them with materials from events or projects on which you have worked. You have a better chance of attracting the interest of someone if they already know you, and what you do. Make a practice of getting in touch with a key group of actors regularly.

Sometimes a contact we have in a donor organisation will know of other donors that might be interested in the work we do. Alternatively, when and if they are in a position to seek partners for projects or disperse funding, they will know you and your organisation.

Questions you should ask donors

- What funding do you have in the area in which we work?
- What are your organisation's focus areas, or thematic priorities?
- To whom do you grant funds—local organisations, international organisations, and or consortia?
- What is your funding cycle? When do you usually issue calls for proposals?
- What kinds of projects have you funded in the past, and what makes a successful programme from the donor's point of view?

Tips!

Working with Donors

- Take the time to research donors; understand their priorities and thematic focuses.
- Build and maintain a relationship with donors; introduce yourself and your organisation, stay in touch, send them regular updates of your programming, and/or seek their advice.
- Ask about their funding mechanisms and learn about their grant-making cycles.
- Be an active contributor to any partnerships you establish with INGOs or donors.
- If you are interested in working with INGOs let them know you would consider a partnership for future programs—they are always looking for local partners and beneficiaries.
- Make sure your organisation has written policies and procedures covering financial management and accountability which provide confidence to potential donors that your organisation can accountably manage funding.

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Strategic Planning
CHAPTER III

In this section, we explore the necessary planning elements for every organisation. We look at:
1. Defining who you are,
2. what you do,
3. and, what you want to achieve.

Strategic planning is a worthwhile exercise regardless of the size of your organisation, or whether you have funded programmes, or have paid or volunteer staff. It provides direction and allows you to measure organisational progress. Elements of a strategic plan also provide internal and external audiences with a clear understanding of who you are and what you do.

Things to include in a strategic plan

- Values.
- Vision.
- Mission.
- Objectives.
- Goals.

If you clearly define these five elements you will be better at communicating with your internal audiences (volunteers and staff) as well as external audiences such as potential donors. They will have an easier time understanding who you are and what it is you do.

1. **Values** are ideas that guide you. These are the principled ideas that you want to be directed by and project to others. Values answer the question: «What do we stand for?».

NOTE

Some examples of values are:

- Respect for human rights.
- Cooperation and Partnership.
- Transparency.
- Integrity.
- Voluntarism.
- Responsible.
- Public service.
- Honesty.
- Inclusive.
- Impartial.

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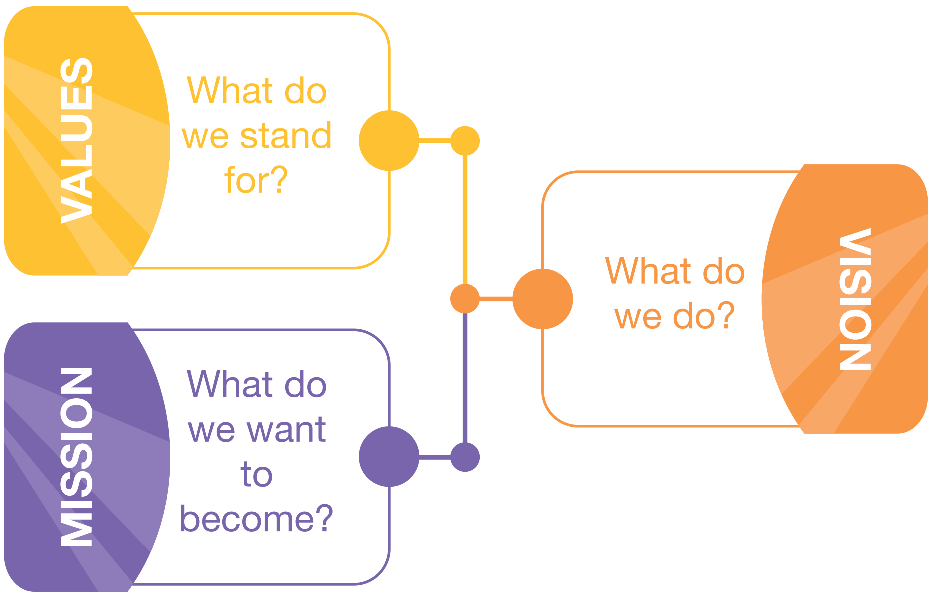
2. **A Vision statements** answers questions such as, «What world do we want to live in, and how does that look?» or «What is the end product of what we are doing?».

   Vision describes the inspirational long-term change resulting from your work. It is future-focused. Vision statements can be very short and to the point, or slightly more elaborate. However, it must paint a clear picture of the future for which you are working and let others know why you are doing what you are doing.

3. **A Mission statement** identifies your fundamental purpose. It answers «Why do we exist?». It guides the organisation toward their purpose. A mission focuses on the present. The mission statement of an environmental organisation might be:

   «Building green societies with, and for, communities.»



4. **Objectives** give substance to your mission and explain how you will work toward your vision. They are a series of statements about how you will implement your missionwork. Using our environmental organisation example above, objectives might be:

   - Work with, and lobby governments to enact environmental legislation and regulation.
   - Inform and influence public opinion, and action, through education.
   - Publicise the social and economic benefits of sustainable development.

5. **Goals** are specific, measurable, achievable, realistic, and time-bound (SMART). Organisational strategic planning goals are different from programme-specific goals, which we will discuss more in the section covering programme monitoring and evaluation. Strategic planning goals speak to organisational priorities that may include, for example; increasing the number of volunteers over a specific period, or increasing income, or establishing a regular media outreach. Using the example above, the organisation might develop a target to increase its volunteer base by 60% over a three-year term.

A live process

Strategic planning is a continual live process. You should regularly review your plans to ensure they meet your needs and continue to respond to your operating environment. While your values may remain constant, your objectives and goals will change over time; you may succeed sooner in achieving specific objectives, or new conditions change priorities. Strategic planning documents are excellent for orienting new staff or volunteers; they enable newcomers to understand the organisation and its overall approach.

SWOT analysis

A useful tool for strategic planning is the SWOT analysis. By examining the organisation's internal strengths and weaknesses, as well as the external opportunities and threats, a team can better assess the current situation and what changes or initiatives will strengthen the organisation.

Conducting a SWOT analysis, with your team, is a powerful brainstorming exercise that allows everyone to contribute ideas, which are further prioritised as strategies to move forward.

For the best results, the whole team should participate in a SWOT analysis. Use the following format (with guiding questions), on flip charts, whiteboards or paper posted to walls. Invite members of the team to either write ideas on sticky notes or directly on the SWOT chart. Once all ideas are on the chart, discuss, and prioritise the ideas to guide your strategy.

	STRENGTHS WEAKNESSES OPPORTUNITIES THREATS (SWOT)	
	POSITIVE	NEGATIVE
INTERNAL	**STRENGTHS** • What are the advantages of the organisational structure relative to others? • What does the organisation do well or better than others? • What are the activities or programs that it delivers well? • What relevant resources exist and can be used? • What is the organisation known for? • What aspects of the organisation's structure, governance, and accountability work well? • What are the strengths of the organisation's human resources? • What are the strengths of the organisation's membership base?	**WEAKNESSES** • What are the disadvantages of the organisation relative to others? • What does the organisation do badly or worse than others? • Which programs or activities are done badly or worse than others? • What relevant resources are volatile, unreliable or missing? • What aspects of the organisation's structure, governance, and accountability are problematic?
EXTERNAL	**OPPORTUNITIES** • Where are the best opportunities for the organisation (activities, membership, resources)? • What trends could—or should—open up opportunities (changes in politica/social landscape, legislation, technology, demand)? • Are social patterns, values, population, lifestyle changing? • What events could open opportunities?	**THREATS** • What obstacles are most likely to emerge? • Are there old or new competitors that could emerge? • Are there changes in demand that could damage the organisation? • Do technological changes pose a threat? • Are there debt or cash flow problems?

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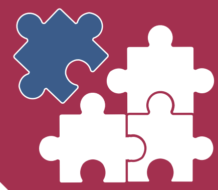
Challenge



- Gather your team and review or write an organisational strategic plan.
- Even if you have established value and vision statements, take time to review them—do they still reflect your organisation?
- If you don't have clear or established values and vision statements, have your team discuss and develop them.
- Schedule a regular review of your values and vision statements from time to time to make sure they still reflect the organisation's aspirations (annually or every two years).
- Conduct a SWOT analysis with the team.
- Take the time to discuss organisational priorities and establish objectives.
- Define specific organisational goals, and establish a methodology for measuring achievement.
- Prepare a strategic planning document that you can share with volunteers, use in promotional material, or provide potential donors and supporters.

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Policies and Procedures CHAPTER IV

In this section, we look at organisational policies and procedures that guide members of the team as well as external audiences.

Every organisation needs a system to document its policies and procedures; it provides confidence to potential donors; it contributes to organisational efficiency; it serves to inform new members of the organisation. Policies and procedures can be a collection of documents or one single document. These should include templates used in accounting and human resources (i.e. timesheets). Members of your organisation will need to have access to some of your policies and procedures to ensure they know you expect of them and what they are entitled to do.

Policies and procedures within an organisation broadly includes:

1. Administrative policies and procedures.
2. Financial management.
3. Communication.

1. Administrative policies and procedures

Labour and workplace laws must be understood when developing administrative procedures. For example, there are often precise laws about hours of paid work—**your policies cannot contradict the law**. Also, health and safety regulations may require that you create certain conditions in the workplace. How an organisation complies with these legal requirements needs to be detailed in policies and procedures.

The Administrative policies and procedures describe all the measures the organisation uses in operating. It is effectively the employee or volunteer's manual that details how the organisation functions. This document should be reviewed regularly and updated as organisational needs change as do laws that govern CSOs, employers, and working conditions. Depending on the available resources, it is often worthwhile having a lawyer review your policies to ensure they conform to applicable laws.

Administrative policies and procedures may include:

Human resources: Human Resources policies establish expectations of employees or volunteers. They should clearly outline procedures for recruiting, hiring, requesting leave, workplace grievances and set expectations of employees or volunteers. Procedures may include:

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- Hours of work including procedures for filling timesheets or other time tracking methods.
- Holiday and sick leave policies.
- Pay schedules.
- Travel policies.
- Workplace dress codes.
- Individual and team behaviour expectations.
- Harassment policies.
- Conflict of interest policies.
- Disciplinary measures.
- Organisational structure and reporting lines.
- Descriptions of functional units or departments and reporting expectations.
- Environmental policies (increasingly offices are implementing recycling and waste reduction programmes—Green Offices).
- Use of facilities guidelines; use of staff kitchen for example, proper use of office furniture, and so on.

Safety and Security

- Workplace safety requirements such as first aid kits or fire prevention/fighting equipment.
- Emergency measures such as evacuation in the case of fire or natural disaster.
- A list of emergency contact information including organisational phone trees.

Information Technology Policy: Increasingly, data protection laws oblige organisations to take measures to ensure personal data are not lost or stolen. Laws may also guide organisations of what may or may not be accessed on the internet. IT policies may detail:

- Internet and social media expectations—for example, an organisation may work with vulnerable groups and adopt a policy not to post personal or geographical information about activities on social media.
- Employees access and use of the internet from work-issued computers in and away from the workplace. Are there websites or topic employees should refrain from accessing on the organisation's access points?
- Appropriate use of information technology equipment to include phones, internet access, social media, as well as audio and video equipment.
- Procedures for storing data, creating data backups, and sharing of specific data.
- Procedures for securing IT equipment; password protection and frequency for changing passwords, recording passwords, and allowing access to equipment.
- The use of email accounts.

2. Financial Management

Your administrative policies and procedures can include a section on financial management. However, as an essential set of rules, it is often worthwhile having a separate financial management document. Potential donors will have additional confidence in your organisation with separate and comprehensive financial policies and procedures in place.

Financial management policies and procedures should detail the range of forms and accounting practices used within your organisation. Remember, many donors expect you to uphold the same high standards of accountability to which they are held, so documenting every transaction is crucial.

Cash management: A set of rules and processes for the handling of cash and financial instruments (cheques and wire transfers).

- Do you keep cash in your office? What are the limits to the amount of money held in the office? What safeguards do you have in place? Is there a locked cash box, safe, or secure room?
- Who is responsible for handling

money, and held accountable for reconciling cash?

- How often does your organisation conduct routine cash counts? Are there provisions for surprise or ad hoc cash counts?
- What forms and systems are used in paying vendors, reimbursing staff, and what are the approval processes?
- Are there thresholds for approval of expenditures; for example, organisations will have a rule that managers can approve expenditures (and this is only an example) of up to £50.00, directors can approve up to £5,000.00, and expenditures over £5,001.00 require board approval. This level of detail is an important accountability measure.

Accounting procedures

- Allowable costs vary among different donors, but it is good practice for organisations to establish their parameters for expenses that can be incurred or reimbursed.
- Step by step instructions on expenditure requests, payments and dispersals, request for payment or reimbursements, management of documentation (contracts, invoicing, receipts), and detail all organisational accounts (bank as well as cash-on-hand).
- Tax procedures; some organisations are tax-exempt and do not have to pay sales tax, but need systems in place to exercise that exemption. Define how frequently you are required to report and to whom? For example, are you required to file annual or quarterly reports to the civil society registrar? Is there needed internal reporting, such as the board of directors of your organisation?
- Bookkeeping procedures; where and how are expenses and incomes recorded.
- Detail audit procedures; internal and external auditing.

Banking

- Organisations should detail the use of their banking information for wire transfers for example. What are your internal restrictions on the use of bank accounts?
- Do donors require separate accounts for their funding, or can you use the organisation's regular account?

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3. Communication

Communication policies and procedures are vital in gaining brand consistency and ensuring clear communication. Organisations should consider the following elements in a communication policy and procedures document:

Media and Communication policy: While it might seem overly formal, ensuring people are speaking to issues for which they have authority reduces the possibility of confusion and mixing of messages.

- Designate those authorised to speak «on the record» to media.
- Describe the processes used to authorise communication with various audiences, both internal and external. For example, managers may have the authority to communicate with members of specific teams; however, internal policy communication may need to be delivered by the organisation's leadership.
- Detail which media you use and how. Social media, for example, will require content managers and internal procedures necessary to authorise public-facing communication.
- Detail processes for dealing with all incoming and outgoing communication. Who, for example, handles general inquiries received by your online platforms? Do you have policies about how long it should take to respond to various audiences?

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What approval processes are there for finalising and publishing organisational reports?

- Provide templates for media and broadcast releases (samples of both found in Appendices).
- Prepare a list of materials required for media kits and promotional materials. These might include:
  - Background descriptions of the organisation.
  - Bulletins or brochures.
  - Contact cards or information.
  - Previous press releases or reports.

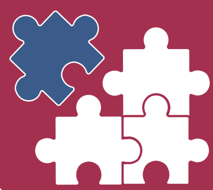
Branding and marketing: What visual identity does your organisation want to project? Describe the use of:

- Logos—what are the colours of the logo? How and where should it appear on publications and social media? If it is not immediately apparent, explain what your logo means—it may be an excellent marketing opportunity to talk about your organisation.
- Fonts used in reports, in social media, and press releases.

Crisis communication: Most organisations, including large corporations, often do not invest enough time in crisis communication planning or communicating procedures. If, for example, there is a fire at your organisation's headquarters, from where will you operate? How will you inform people, how will you communicate with friends, family, or donors?

- Detail contingency plans for all potential and realistic emergency situations. For example, it is unlikely that space aliens will land on your headquarters, but there is a likelihood of an extreme weather event disrupting your work. How will you communicate if there is a disruption in electricity or telephone service? If your office is not operable, where should people go? If one of your staff is unable to communicate are there back-up contacts to whom you can reach out.

Challenge



Gather your internal policies and procedures and review them. Ask yourself:

- Are they still relevant?
- Do they reflect what we do, and how we do it?
- Are these policies compliant with legal obligations?
- Are there additional policies we need to have in place to be more efficient?

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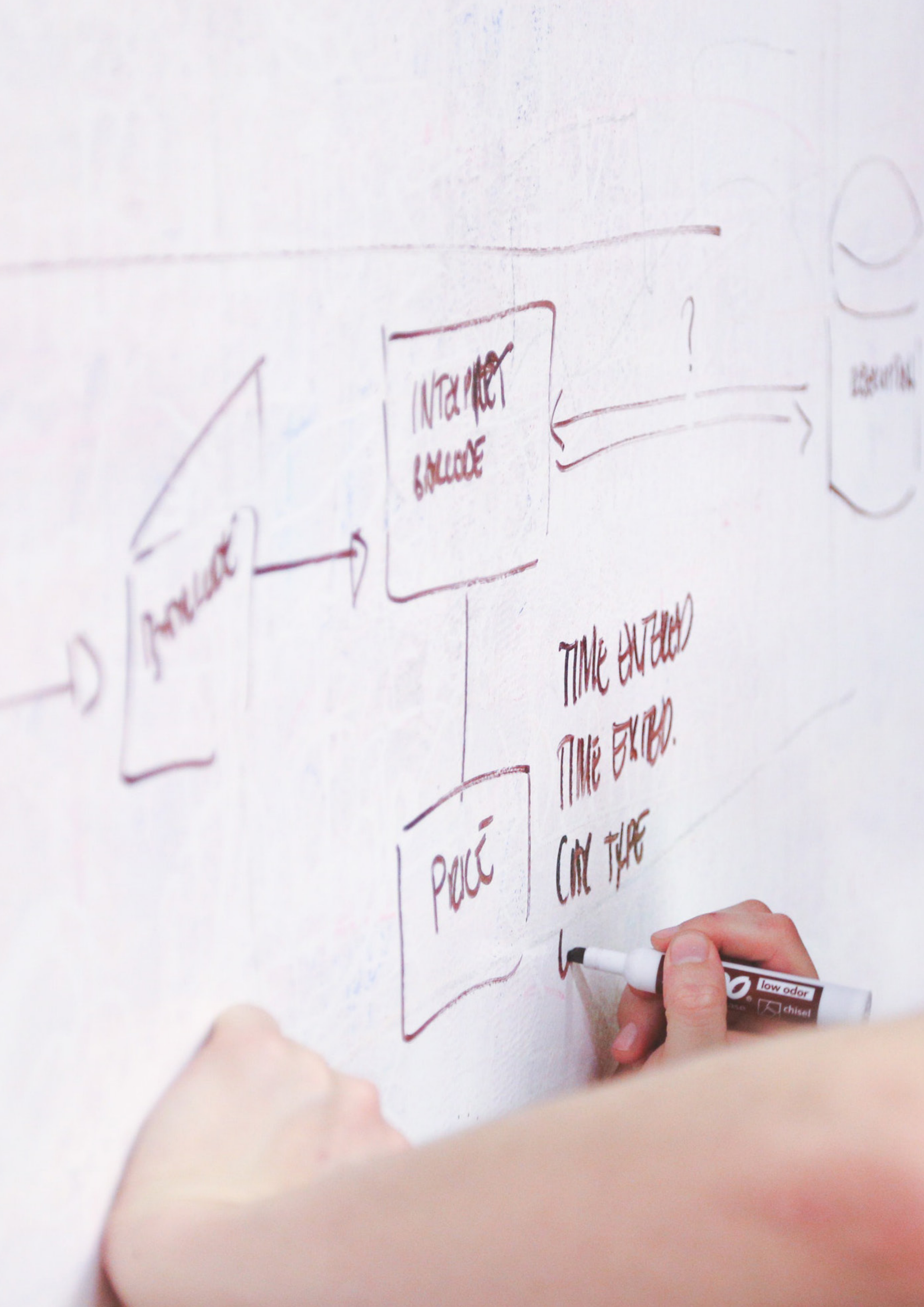
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Project Design Process
CHAPTER V

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In this section, we look at crucial steps in the project design process:

Assessing needs and defining problems, conceptualising a project, writing proposals, and developing budgets.

Projects are the building blocks for the organisation goals, vision, and mission. An organisation's values guide the direction and tone of projects.

The Project Management Institute (PMI) defines a project as «a temporary endeavour undertaken to create a unique product, service or result.» In other words, a project is a set of planned and connected actions to achieve pre-defined objectives within a specified time and a specified budget.

The diagram of the project cycle shows a set of actions: design, planning, implementation, monitoring and evaluating, reporting, and learning. These actions are connected and sequential. A project is a loop because learning from previous project evaluations informs the design of new projects.

The project design phase is crucial as it affects every step in the process.

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After developing a strategic plan (refer to Chapter III) for the organisation, it is now time to design projects that will achieve the goals of the organisation and realise your vision.

1. Assessment

The first step in the project cycle is the assessment. Since an assessment is a systematic examination of needs and gaps, it is often called a «needs assessment.» It is the process of searching, inspecting, and examining a situation to gather information about what is happening on the ground. The assessment process is valuable, as it will enrich the quality of the project. This phase will strengthen the organisation's relationship and credibility with stakeholders and beneficiaries. During an assessment, you should analyse the information gathered, to investigate the causes/effects of the problem/issue that your organisation is trying to solve.

Donors often impose tight timelines on requests for project proposals, which can cause organisations to rush, or neglect altogether, the assessment phase. Rushing an assessment usually leads to poorly designed projects. Also, an incomplete assessment may result in inaccurate information and misleading data which will harm the project and the organisation.

Keep in mind that an accurate assessment and gathering suitable information does not require considerable effort, time, or money.

Assessment methods

Many methodologies can be used to assess a situation; organisations may use one or more methods to gather the necessary information. Following are the most common.

Literature and Previous Data: Most assessments start with reviewing the available literature on the issue/problem on which the organisation would like to work. A review enables you to collect previous «open source» data available on the issue from different international/local organisations and governmental institutions. Starting this way will save you resources, time, and money. By taking advantage of work others have already completed, your organisation can use the information to conduct an analysis of the situation and identify gaps. You can then use other methods to fill the gaps.

Tip!

Make sure any review and application of existing information use credible and recognised sources so you can be confident in the data you collect!

Qualitative Research is primarily exploratory research. It is used to gain an understanding of underlying reasons, opinions, and motivations. It provides insights into the problem or helps to develop ideas or hypotheses for potential quantitative research. Qualitative Research is also used to uncover trends in thoughts and opinions, and dive deeper into the problem. Qualitative data collection methods vary using unstructured or semi-structured techniques. Some standard methods include focus groups (group discussions), individual interviews, and participation/observations. The sample size is typically small, and respondents are selected to represent various demographic or issue-based groups.

Quantitative Research is used to quantify the problem by way of generating numerical data or data transformed into usable statistics. It is used to quantify attitudes, opinions, behaviours, and other defined variables – and generalise results from a larger sample population. Quantitative Research uses measurable data to formulate facts and uncover patterns in research. Quantitative data collection methods are more structured than qualitative data collection methods. Quantitative data collection methods include various forms of surveys – online surveys, paper survey, mobile surveys and kiosk surveys, face-to-face interviews, telephone interviews, longitudinal studies, website interceptors, online polls, and systematic observations.

Interviews: Key informant interviews are qualitative in-depth interviews with people who know what is happening in the community. The purpose of key informant interviews is to collect information from a wide range of people—including community leaders, professionals, or residents—who have first-hand knowledge of the community. These experts, with their particular awareness and understanding, can provide insight into the nature of problems and give recommendations for solutions.

A semi-structured interview is a method of research used most often in the social sciences. It is open, allowing new ideas to be brought up during the conversation as a result of what the interviewee says. The interviewer in a semi-structured interview generally has a framework of themes to be explored. However, the specific topic(s) the interviewer wants to investigate during the discussion should usually be thought about well in advance (especially during interviews for research projects). It is generally beneficial for interviewers to have an interview guide prepared, which is an informal grouping of topics and questions that the interviewer can ask in different ways for different participants. Interview guides help researchers to focus an interview on the issues without constraining them to a particular format. This freedom can help researchers tailor their questions to the interview context/situation, and the people, they are interviewing.

Observation is a data collection method, by which you gather knowledge of the researched phenomenon through making observations of events or circumstances, as and when they occur. Observation often reveals important information that cannot be obtained through other resources or interviewing people. Your organisation can use volunteers to observe activities or events in the community. For example, an environmental organisation might deploy a team to watch how many people do—or do not—throw garbage on the street, or how many shoppers use plastic bags versus reusable cloth bags.

How do you conduct an assessment?

As with anything else, you need to answer key questions: Why? What? How? Who? When?

- WHY is the organisation doing this assessment? What are the objectives?
- WHAT is the organisation trying to assess?
- HOW is the organisation doing this assessment? What methods are being employed?
- WHO will be involved in the assessment?
- WHEN will you conduct the assessment?

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Tip!

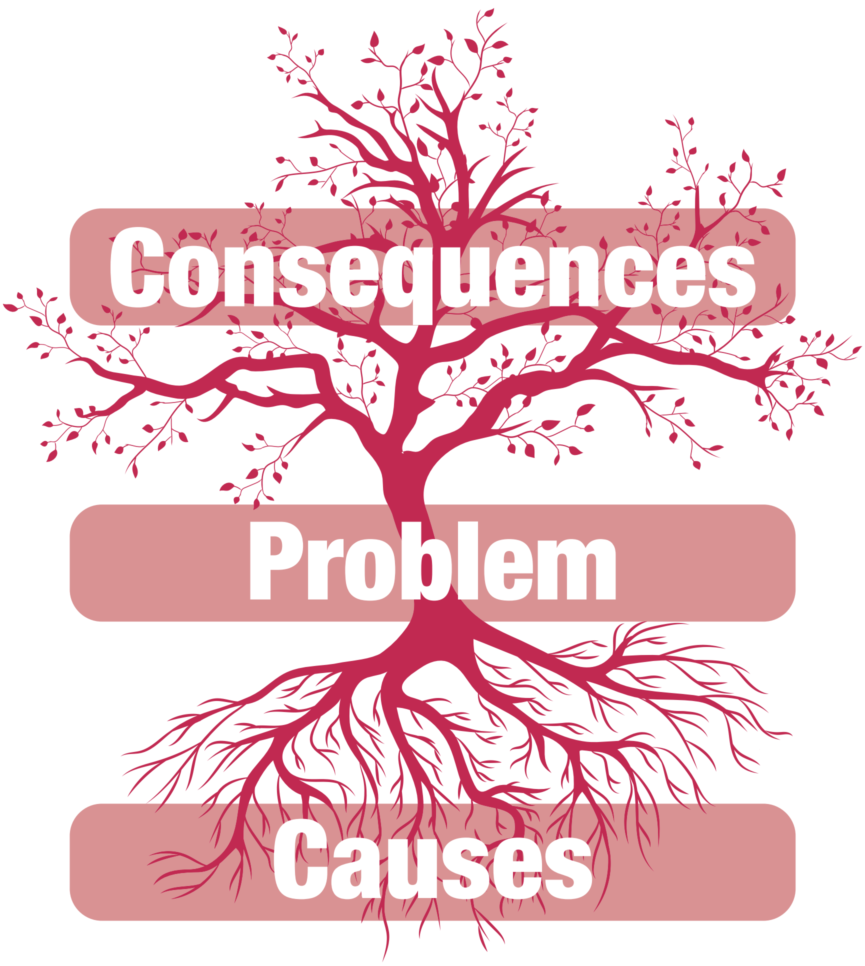
Crucial questions to answer as you design an assessment:

- How will you engage stakeholders in your assessment?
- Are you applying a gender lens to your methodology and your analysis?
- How will ensure the quality of your data?

2. Problem Tree

After conducting the assessment, an organisation could construct a problem tree which will be converted later to an objectives tree.

The problem tree is one method of mapping out core problems, along with their causes and effects, helping project planners to identify clear and manageable objectives. Like any other tree, the problem tree has three parts: a trunk, roots, and branches. The trunk is the core problem, and this will help to identify the causes of the problem (the roots) and the condequences (effects) of the problem (the branches).



Problem: A problem is a specific negative situation related to the stakeholders' condition. A problem trees identifies the problem (sentences that answer a «who,» «what,» and «where»), written next to the trunk to identify causes and effects. A problem might be armed conflict in a community.

Cause(s): A cause is a factor that exists inside the community or external environment that creates or contributes to the problem. For example, a high percentage of unemployment contributes to the problem of armed conflict in a community.

Consequence(s) (Effect): Effects are political, economic, social, or environmental conditions, usually unfavourable, which result from the problem. For example, armed conflict in the community affects the number of new and existing investments and startups.

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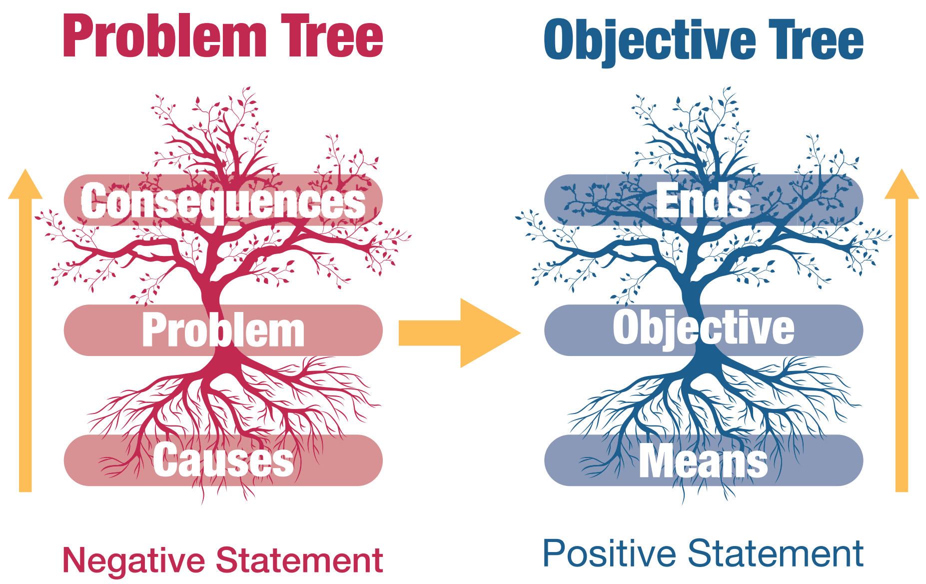
Transferring the problem tree to objectives tree

An objective tree is a project planning tool that helps analyse and graphically break down objectives into smaller and more manageable parts. The objective tree is a tool derived from its parent tool the problem tree.



Problems (from the problem tree) are transformed into positive objective statements within the objectives tree.

The problem tree shows «cause-and-effect» relationships; also, the objectives tree shows «means-to-end» relationships.

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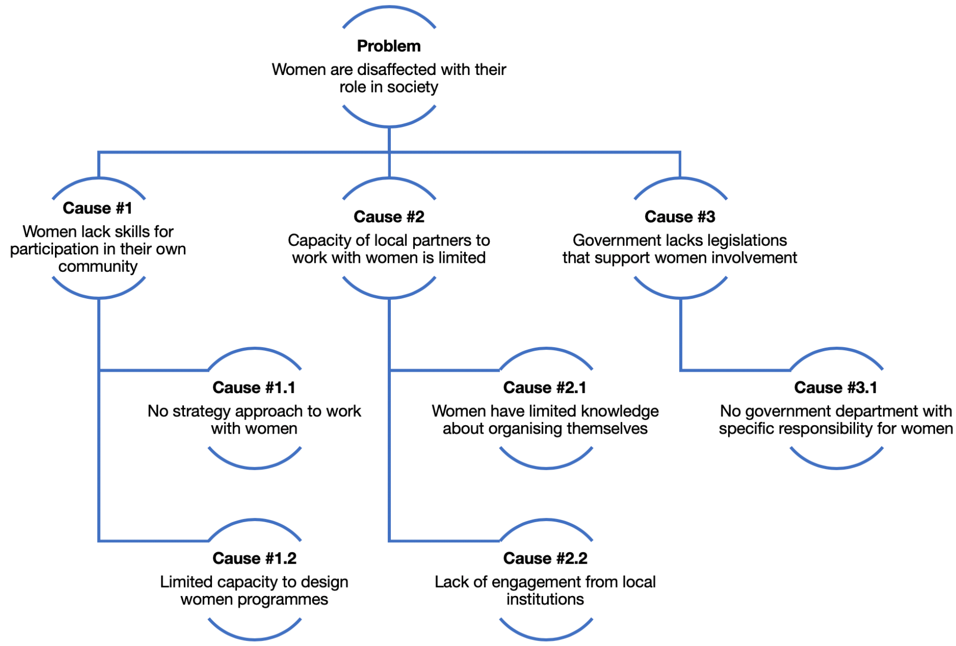
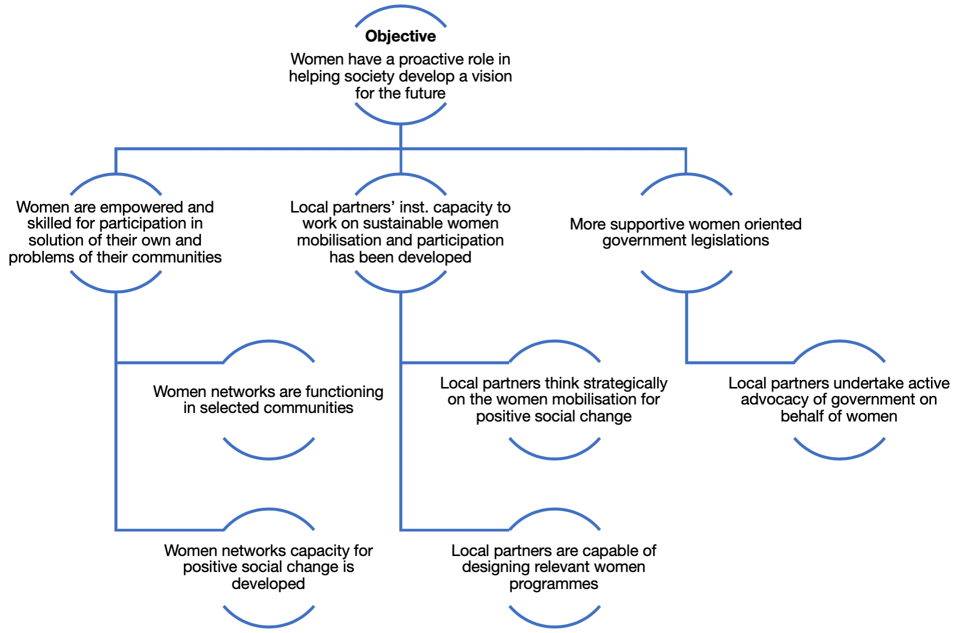
Below, is an example of transfering problem tree into objective tree.





3. Concept Notes

Notes:

A concept note starts the project design and proposal preparation process. Preparing a concept note initiates communication with partners and donors before investing time in a project proposal. Also, it encourages staff and partners to develop new ideas for discussion before preparing a full project proposal.

The concept note focuses on the idea but not the details of the idea. This approach is usually approximate with enough features to present the project that the organisation is planning to develop. The concept note should show why the idea is successful and how it will have an impact without going into full specifications of the project.

Donors often request concept notes as the first step in the funding process. Donors like to have a preliminary idea before encouraging organisations to invest resources in developing the project proposal. Most donors use concept notes to shortlist organisations when they expect a large number of applicants to give them a chance for negotiations in the early stages of funding decisions.

The differences between concept notes and proposals are:

Concept Notes	Proposals
A tool to start and test ideas for projects.	A tool to get donor's approval on project funding.
Focuses on problem analysis, general objectives, and some results.	Includes every single detail of the project.
The first step in project design.	The last step in project design.
Requires minimum resources.	Requires investing resources.
Takes a few hours/days to develop.	May take weeks to develop.

The concept note allows the writer to organise and present the information in the most precise possible manner. Limiting the number of pages helps the writer keep the concept note short, clearly giving the main ideas. In later stages, the full proposal presents all the details of the project. Some donors may also have specific formats for concept notes, including the number of pages and the content. However, usually, the concept note should be three to five pages maximum.

Example

Example of concept note contents:

- Concept Note Title
- Submitted by
- Date
- Problem Analysis
- Objectives
- Activities
- Outputs
- Duration and Finance

Notes:

The concept note title must be distinctive, creative, and informative. The title can consist of two parts; the first part should be short and catch the attention of the reader, while the second should be longer to include information.

Submitted by should include the organisation's name and contact details of the organisation and person in charge of this concept note.

Date of submission for the concept note.

Problem analysis should include a brief discussion of the key causes of the problem/issue. How this problem/issue affects the stakeholders and who are those affected by the problem/issue and where they are affected. Make sure to apply a gender lens to your concept and indicate how your project will address issues of inclusion or gender sensitivity. Try to answer the following questions:

- From where did the idea of the project come?
- What is the problem that the project is trying to solve?
- Why is it necessary to address this specific problem?
- What will be done to solve the problem?
- How does this project differ from previous projects? Here, you should demonstrate how the project is creative and how it differs from other projects.

Objectives should be based on the problem and objective trees developed as part of the assessment process. Depending on the size and duration of the project, the objective or objectives to be achieved by the implementation of the project should be defined. These objectives must be SMART: Specific, Measurable, Achievable, Realistic, Timely, and relevant to the organisation and to the target group. Furthermore, the objectives of the project must also reflect the strategic objectives of the organisation.

Activities should include a summary of what is planned to achieve the objectives of the project. In the concept note, the activities should be listed briefly without mentioning the details of each activity. Moreover, activities must be related to the achievement of the project objective or objectives. Your concept note should articulate how your approach to activities will achieve the project's objectives.

Outputs are the expected results of the project and must directly relate to the activities and the project. Your concept note should describe the target group(s) benefiting or impacted by the outputs. Many donors focus on specific target groups such as women, youth, persons with disabilities or marginalised communities. You should indicate the expected quantitative and qualitative benefits, when and where they will take place, and the assumptions and reasons for your expectations. Finally, you should note how you will evaluate outputs and impact and who will be evaluating these results.

Duration and finance should include the number of weeks/months/years expected to implement the proposed project. You will, of course, need to provide a donor with a sense of the cost of implementing the project.

Before preparing a detailed budget, it is crucial to have an overview of the inputs needed to achieve the objectives. These may be, for example, human resources, travel costs, the cost of workshops, vehicles, equipment, supplies, services, utilities, and general expenses. Your concept note should include the broad total budget lines, without mentioning the details of each item. For example:

- Staff salaries throughout the project.
- Fixed expenses: office rental costs, electricity, telephone, internet, etc.
- Operational expenses: The total cost of equipment, stationery, and other operational costs related to the project.
- Total costs of activities.

Notes:

Tip!

Once a donor sees the proposed cost of a project, even in a concept note, they will expect to see the same—or less—projection in a formal proposal application. While you should not include inflated costs in a concept note, make sure you have anticipated all necessary expenses in your broad budget overview. It will be much easier to present a lower budget in a formal proposal than a higher one!

Your concept note should also mention any other sources of funding that might be available for the project. Donors appreciate organisations that make an effort to share the cost burden of projects.

The process of writing concept notes for the project is a delicate process. It should reflect the idea and the plan of the project and the need of the target group with whom your organisation works, in addition to the importance of solving a problem. You should present all of the points mentioned above in no more than three to five pages, to convince the donor about the importance of your project.

Present your concept note to your organisation's team and listen to their ideas about what you are proposing. You can also ask for the views of friends and supporters of the organisation, as their opinions will contribute to the development of the concept note and, later, the proposal.

If the donor rejects your concept note, ask to know the reason. Most donors are happy to let you understand why a concept note is not appropriate, and they appreciate that feedback is an integral part of the project development process. Knowing why your concept note is rejected helps you improve on the next one.

In the end, always remember that the project must reflect your organisation's strategy and your target group's needs, which should be in line with the priorities of the donors, or else it will not be considered or funded.

If a donor reacts positively to your concept note—Congratulations! Now, it is time to write your proposal.

4. Proposal

The primary purpose of a project proposal is to provide a well-structured, clear, detailed document to donors and partners for final approval and funding for the project. The project proposal document also serves as part of the agreement or the agreement itself with the partners and donors. Keep in mind that the project proposal will be written based on the concept note you have already developed.

Notes:

Tips for Proposal writing

- **Make a plan and schedule** for writing the proposal; the process needs time for writing, editing, reviewing, editing, finalising, and submitting.
- **Decide on a core team** for the project and collect updated curriculum vitae (CVs) or résumés which will be included in the proposal.
- **Consult and work with the finance team** to prepare expenditure costs for different activities—per diem, consultants' rates, equipment, and training and meeting venues.
- **Involve your Monitoring and Evaluation expert** in the organisation to help prepare a well-structured M&E plan.
- **Learn from previous experiences** in submitting proposals to the same donor or contact partners to learn from their experience with the same donor/partner.
- **Ask questions.** Usually, donors provide a specific period for organisations to submit questions about the call for proposals. Use this opportunity carefully and submit a list of clear questions to help the proposal writing team in their job. Remember that donors share all questions and answers with other organisations competing for the project funding.
- **READ, READ, and RE-READ** the request for proposals documents from donors and follow their guidance.
- **Follow the donor's guidance** in preparing the proposal document if you want to get the funding.
- **Write the proposal using facts not emotions.** Organisations should be able to substantiate all statements in the proposal, otherwise, do not write them.
- **Highlight what the project will achieve** and how; not what should be done in general to address the identified problem/issue.
- **Use simple language** and do not overuse abbreviations, initials, non-English expressions (unless translated) or jargon.
- **Define acronyms** when they first appear in the text and provide a glossary.
- **Choose powerful and energetic action words** when writing the proposal. Examples: achieve, analyse, define, learn, or search, and avoid passive verbs such as «was» and «were».
- **Format the proposal to be clear, easy to read, and attractive.** Use headings, subheadings, and text boxes systematically. Tables, charts, diagrams, and drawings can clearly and quickly communicate complex ideas and make them easier for donors to understand.
- **EDIT, EDIT, and then PROOFREAD the proposal.** Check your spelling, grammar, and formatting. Errors make the proposal look unprofessional. If you are writing in a language that is not your mother tongue, ask a friend who is proficient in the language to check—and correct—your proposal.
- **Get an external perspective.** Invite people from outside your organisation to read the proposal and check unclear ideas or paragraphs.

Proposal Template

Most donors have a template for proposals that organisations should follow in their preparations for projects. However, here are the usual, general sections of a proposal template.

- Information sheet.
- Summary.
- Context (Background).
- Problem justification.
- Objectives.
- Results.
- Sustainability.
- Monitoring and evaluation plan.

- Organisation structure and project personnel.
- Activities schedule.
- Detailed budget and division of financial sources.
- Annexes.

Information sheet: Indicate the project title, the name of the lead organisation (and potential partners, if any), the place and date of project preparation and the name of the donor to whom the proposal is addressed.

Summary: Include a summary of the following: the problem statement; the project's objectives; description of the implementing organisations; the key activities; and the total requested budget. The project summary is the last section to be compiled, after finishing the full proposal.

Context (background): Include a description of the political, social, economic, and cultural background influencing conditions for the project. It should contain relevant data from research carried out in the project planning phase, including any needs-assessments, or information collected from other sources.

Problem justification: Articulate the problem statement which provides a description of the specific problem(s) the project is trying to solve, to «make a case» for the project. Describe the effect of this problem on stakeholders. Also, include a description of the strategy chosen for solving the problem and precisely how it will lead to improvement. Furthermore, this section should include a description of the capabilities of the organisation to implement the project by referring to its capacity, previous projects achieved, and how the partners will support the implementation of this project.

Goal and objectives: Define the overall project goal by explaining why and how the project is essential to solve the core problem. Break down and detail specific project objectives that contribute to reaching the overall project goal.

Results: Describe the outcomes of the project, what the project will deliver to the stakeholders, and how it will solve the problem.

Sustainability: Demonstrate how you expect results and benefits of the project to continue beyond your intervention.

Monitoring and evaluation plan: Describe plans to monitor and evaluate the performance and effectiveness of the project. Note the indicators you will use to measure success. This plan should include the overall learning events planned for the project, project implementation monitoring activities, critical assumptions tracking, midterm or final evaluations and quantitative and qualitative studies. For more information, see the section in this **toolkit** on Monitoring and Evaluation.

Organisation structure and project personnel: Focus on the human resources and organisational structure necessary to plan, implement, monitor, evaluate, and report. This section allows the donor to understand who is responsible for the various project phases and how the organisation will manage resources.

Activities schedule: Detail the project activities; identify their logical sequence and highlight the link between activities.

Detailed budget and division of financial sources: Include, in detail, all the financial requirements to implement the specific activities. If there are several donors included in the proposal, note how each donor will contribute to the project. Include detailed budget notes to demonstrate from where and how you calculated your budget figures. For more information, see the section in this **toolkit** on Budgets.

Annexes: Include any additional information that you do not include as part of the main proposal, such as registration documents, studies, staff resumes, and documents related to the project partners.

Notes:

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5. Budget

A budget completes your proposal and explains your programme in monetary terms. It determines the boundaries of the project. If it is too high, the donor may ask you to reduce it or may reject the entire proposal – especially if there is a competitive process with other organisations to consider. Your budget is essential for projecting expenses, but also to convince donors that you will deliver value for their money.

Budgets should be:

- Transparent.
- Demonstrate impact.
- Demonstrate capacity.
- Be realistic.

There are two types of budgets:

Line Item: Provides the total cost projections for various categories of expenses throughout the life of the program. Generally, the categories include; Employee Compensation, Contractual Services, Transportation and Accommodation, Meetings and Events, Equipment and Supplies, Indirect Costs, and so on. Sometimes the donor will provide a template, and the categories are defined. Often, however, you will need to construct your budget template with categories you specify. Be sure that the categories are clear and reasonable.

Activity-based: Provides the actual costs of carrying out programme activities broken down by monthly expenditure. Uses similar categories as a line item budget, but the activity-based budget demonstrates the projected monthly expenditures (spending) in each of those categories.

Elements of budgets include:

- Project activities.
- Operational costs.
- M&E activities.
- Contingency.
- Matching or donated costs.

Line Item Budget

Line Category	Sub Item	UNITS	Quantity	UNIT COST (€)	Sub total	Category Total
Employee Compensation						**€8,000.00**
Accountant Office Manager		0.5	4	500.00	€1,000.00	
Project Manager		1	5	800.00	€4,000.00	
Director		0.5	6	1,000.00	€3,000.00	
Contractual Services						**€26,400.00**
Logistics Assistant	3 month contract	1	3	1,500.00	€4,500.00	
Event Manager	3 months	1	1	1,500.00	€1,500.00	
Even Assistants	One week contracts	4	1	100.00	€400.00	
Speaking fees		4	1	5,000.00	€20,000.00	

Activity-based Budget

Costs	Sub Item	UNITS	Quantity	UNIT COST (€)	Sub total	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Category Total
Employee Compensation												**€8,000.00**
Accountant Office Manager		0.5	4	500.00	€1,000.00			€250.00	€250.00	€250.00	€250.00	
Project Manager		1	5	800.00	€4,000.00	€800.00	€800.00	€800.00	€800.00	€800.00		
Director		0.5	6	1,000.00	€3,000.00	€500.00	€500.00	€500.00	€500.00	€500.00	€500.00	
Contractual Services												**€26,400.00**
Logistics Assistant	3 month contract	1	3	1,500.00	€4,500.00			€1,500.00	€1,500.00	€1,500.00		

Notes:

Notes:

Tips!

Tips for preparing budgets

- Check the application or understand the donor's guidelines.
- Is there a budget limit?
- Are there items/activities for which the donor will not pay?
- Research costs – DO NOT make them up!
- Engage all team members in talking through activities.

Staff costs

- Be transparent.
- Be realistic.
- Break down by hourly costs at market rate.

6. Project Agreement and Negotiation

If a donor accepts and approves your proposal for funding—congratulations! But, it is important to note aapproving a proposal is not the same thing as having an agreement to implement a project or programme or to spend money. Organisations should not make any budgetary commitment UNTIL they have a signed agreement or contract for spending.

Once the donor accepts a proposal, you will need to negotiate an agreement. The donor will review both activities and budget with the organisation. Expect some changes—this is normal. For example, the donor might appreciate an organisation's ability to manage programs, and like most proposed activities, but may want to change or eliminate some aspect. Changes to activities may have a budgetary impact.

The donor-implementer relationship works best when both consider it a partnership. If an organisation feels strongly about something, it should respectfully make an argument for its priorities. The programme may not look exactly as proposed, but the negotiation of an agreement is a part of the process.

You and your organisation must feel comfortable with the programme before signing an agreement. If you think the agreement contains elements you cannot live with, then you must make your point. For example, some donors insist that implementers display the donor's logo and other branding throughout the programme. However, in some contexts putting branding on materials may endanger implementing staff. Consider areas with high terrorist activity or strong anti-foreign government sentiment; it may focus attention on an implementer if they are required to display flags or logos of sponsoring countries. Quite often implementers will negotiate with the donor on issues such as this, and most often donors are understanding and willing to yield.

Notes:


Domain Analysis
Overview
SEO Research
PPC Research
Batch Analysis
Infographics
URL Analysis
Keyword Research
Backlink Analysis
Rank Tracker
Site Audit
Tools
Hide menu
Infographics
Website statistics: amazon.com/yandex.ru (MSK)
Visibility
39.42
Organic keywords
25.8K
SE Traffic
122 841
Ads
992
Visibility
SERPSTAT
Organic Keywords

Monitoring & Evaluation (M&E)
CHAPTER VI

Notes:

In this section we explore one of the most important, and often intimidating, elements of programme implementation:

Monitoring and Evaluation (M&E)

For many activists, M&E is an intimidating concept. Many people think that M&E is a complicated process. Donors and M&E experts often use cryptic and abstract terminology that can be—at best—confusing and—at worst—scary. So, let us break it down.

M&E is not something you design or implement after your project or add as an afterthought. It should be a fundamental element of your project design and implementation. Just as no project is complete without a budget, no project is complete without a M&E plan.

What is monitoring and evaluation?

- A systematic and (often) long-term process that gathers information on the progress made by an implemented project.
- A time-specific judgment if a project has reached its goals and delivered what was expected according to the plan.

MONITORING

«A continuous, methodical process of collecting data (information) throughout the life of a project.»

Information should be collected at every step of the project. DataInformation can be collected for regular evaluation of progress so you can make adjustments while work is on-going on. Monitoring can also systematically track conditions or trends, for example, changes in the environment or the status of women.

EVALUATION

«Assessing what has taken place by measuring, analysing, and interpreting change.»

Evaluation assesses and interprets the data collected during monitoring. Evaluating the outputs, outcomes and impact of your activities allow you to determine what difference your project has made to beneficiaries.

Why Monitor and Evaluate?

- **Accountability**—it holds your team to account for its work on a programme and provides the donor or your funders with confidence that you are doing what you said you would.

Notes:

- **Supervise the work of staff and volunteers**—It provides leadership, managers, and staff with a clear roadmap and targets of what needs to be done.
- **Learn and improve work**—it allows for reflection and an opportunity to adjust to circumstances. It also lends to the efficiency of work, particularly if everyone understands the objectives and goals.
- **Provide evidence for advocacy**—data collected through monitoring and evaluation allows for evidence-based arguments for your advocacy programmes.
- **Public relations**—Data and stories collected through M&E allows you to package information for use in promoting your organisation.
- **Resource allocation**—M&E plans allow you to map out what resources need to be employed at a particular time.
- **Measure impact**—M&E allows for the collection of data that demonstrate the impact of programmes.

Challenges to M&E

- **It takes time**—While it is worthwhile, creating M&E plans, collecting and analysing data, takes time and human resources.
- **It is difficult to measure complex democracy programmes**—programmes aimed at changing behaviour present challenges. How you measure attitude change is important but difficult.
- **Some donors are reluctant to pay for M&E activities**—well-constructed M&E systems need resources for which some donors may be reluctant to pay. They may insist that fewer resources be committed for the same level of monitoring and evaluation.
- **Different opinions on what change looks like, and what makes a difference**—not everyone always agrees on the causes of change, or even what qualifies as change. Therefore your M&E plan must be well thought out, data collection should be rigorous, and your analysis based on evidence.

Three universal evaluation questions

There are several different methods and systems for monitoring and evaluation, but they all ask and answer these three universal questions.

Planning for M&E

When planning for M&E, involve everyone. Include the whole project team in designing the M&E plan. The team that develops activities is best-placed to know what can be monitored and what the anticipated results are. Know your project, inside and out.

If you define the desired changes, the process by which change is expected to happen and the resources needed to make the change, you will be in an excellent position to decide on a monitoring and evaluation strategy.

Ask yourself the following questions:

- For WHOM are we doing this?
  - Is it for the organisation or the team implementing the project or programme?
  - Is it for the leadership of the CSO?
  - Is it for the donor?
  - Is it for the beneficiaries of the programme?
- WHAT will we monitor or evaluate?
  - Different stakeholders have different interests and priorities. A donor may have different priorities than a beneficiary.
- HOW is the monitoring and evaluation activity to be done?
  - What resources (time, money, and people) do you have and are they enough for the M&E activity?

The stages of M&E

M&E involves different stages throughout the life of your project. These stages should be included as distinct project activities. The main stages of monitoring and evaluation are:

- Formulating and setting objectives.
- Identifying indicators.
- Monitoring results (Collecting information).
- Reviewing and reporting on results.

The logical framework

The most common method used for designing M&E plans is the «logical framework.» This framework is also known as «goal oriented project planning» or «objectives oriented planning.» While it may seem confusing at first, the framework provides a logical, step-by-step approach to the elements of a project as they are implemented. For a step-by-step explanation of how to design a logical framework for you project, consult the video on M&E on IWPR's YouTube channel.

Individual elements of a project are impact, outcomes, outputs, and activities. For each of these elements, a logical framework should note:

- Indicators > **what** is being measured.
- Verification > **how** indicators are measured.
- Risks and assumptions > external events that may affect achievement of each element.

Tip!

Many donors will ask you to articulate risk mitigation measures, in addition to identifying risks.

As an example, the following, simplified framework is presented for a hypothetical project that contributes to women's economic independence.

Notes:

Notes:

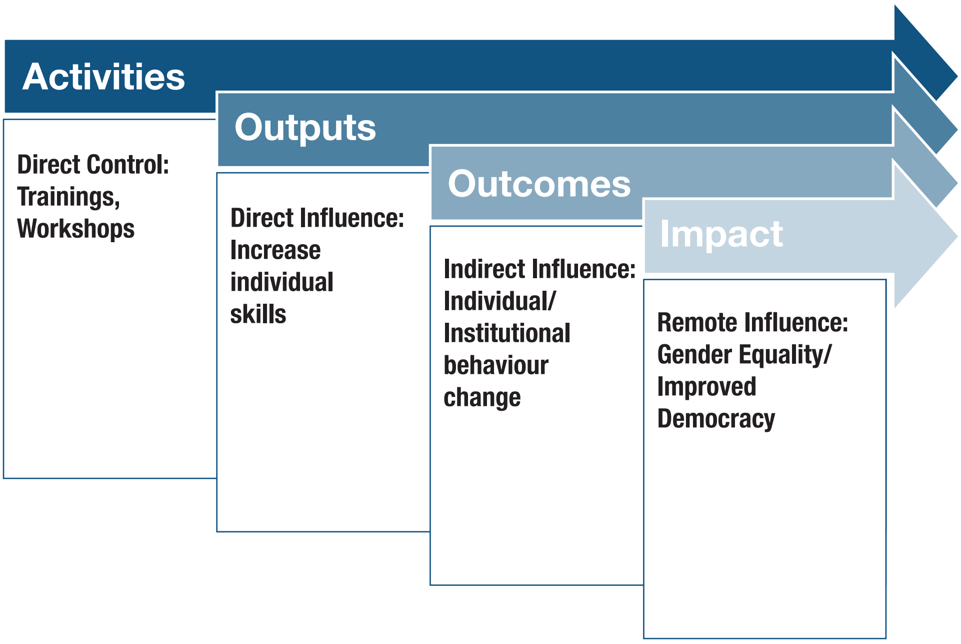
	Indicators WHAT is measured	Verification HOW indicators are measured	Risks and Assumptions External events that may affect achievements
Impact/Goal/Overall Objective: Women gain economic independence to support themselves and their families.	The rate of poverty among women and children decreases.	• Official statistics. • Surveys in the community. • Observations.	**Risk:** the legal framework prevents women from exercising economic independence.
Outcome/Specific Objective: Project participants engage in economic or entrepreneurial activities.	4 participants start their own business. 4 participants secure jobs using new skills.	• Questionnaire to participants. • Survey of employers.	**Risk:** the economy does not support new employment. **Risk:** families do not allow women to engage in business.
Outputs/Expected Results: Project participants have new skills to engage in economic activity.	8 participants gain new skills or knowledge.	• Questionnaire to participants.	**Risk:** training not clear enough for participants to understand. **Assumption:** participants are interested in the topic.
Activities/Interventions/ Inputs: Workshop on how to start a business and market your skills.	10 participants attend the workshop.	• Sign up sheet of participants.	**Risk:** participants do not attend.

Working your way through the logical framework will help you ensure that your activities are appropriate interventions to reach your objectives—the desired change and results you want to achieve. Too often, organisations mistakenly design projects beginning with activities. If you start by defining your overall goal (impact), you can then understand what specific objectives will contribute to your goal. You will also be able to design activities that are most appropriate to achieve the desired outputs.

The following diagram helps you understand, not only how the different elements of a project relate to each other, but also the level of influence your project has on each component.

As a project implementer, you have a direct influence on your activities and outputs. Your activities—whether they are trainings and workshops or the provision of services—are under your control. Your activities influence the outputs—whether they are increased skills or the improvement of the health of individuals. You have less influence or control over the outcomes and impact since these relate to institutional or behavioural change based on the activities and outputs. You can still, however, monitor and evaluate the outcomes and impact if you have, at the beginning of your project, clearly articulated «SMART» objectives, and established indicators to measure the achievement of the objectives.

Notes:



A note on the difference between objectives and indicators

M&E experts use jargon that is often confusing to implementers who are new to monitoring and evaluation! It is important to know:

An **objective** is not an activity or an output, and an **indicator** is not a change.

TIP!

Objective:

What your organisation is trying to **achieve**, not what it is trying to do.

Indicator:

Information that provides **evidence** of change.

An **objective** must be **«SMART»**

- Specific
- Measurable
- Achievable
- Realistic
- Time bound

Notes:

Indicators are information that provide evidence of change. As we saw from the logical framework, indicators can be as simple as the number of participants that attend a workshop or as complicated as a reduction in poverty rates. Whatever you choose as your indicators for your monitoring and evaluation plan, you must be specific about the way in which you will measure the indicator and how often you will collected the data. Indicators may be qualitative or quantitative.

Key questions for defining indicators

- From where will you collect information?
- Will it be credible/accurate?
- What resources are needed to collect?
- Do you have capacity to collect information honestly and accurately?
- Do we need baseline information?
- Will the indicator tell you something you did not know before?
- Will it help you make decisions?

Data collection methods and tools

Once you have identified which indicators you will need to provide evidence of change, there are several methods you can use to collect the information. None of these methods are expensive, but you will need to commit volunteer or staff resources to collect the information.

Methods for data collection

- Templates for recording quantitative data.
- Surveys.
- Observations.
- Interviews.
- Focus groups.
- Case Studies.

Tools for data collection

- Informal interviews
- Semi-structured interviews
- Focus groups
- Community interviews
- Participant observation
- Mapping
- Time lines
- Venn diagrams
- Flow charts
- Testimonials

Reviewing and Reporting Results

The monitoring and evaluation of your project is not complete unless you report the results. Once you have implemented activities, identified the indicators to evaluate the outputs and outcomes you expect from your project, and collected the information to verify the indicators, you are ready to report your results.

The project team should review all the data collected and brainstorm to interpret the significance of the facts and results presented in the information. Your report should present the facts and results together with your interpretation and analysis of information. Your report can be presented in the following way:

- A record of activities, outputs, and outcomes.
- Interpretation of the significance of activities.
- Evaluation of the facts and results presented.
- Discussion of the outcomes.
- Conclusions.
- Recommendations.

Evaluations should answer:

1. **Has there been a change?** Changes can be positive or negative. In some cases, it might be worth noting changes that have not happened, but which should have been expected.
2. **How significant was the change?** Some changes are small, and some are life-changing. Consider if you need to emphasise the significance of the change.
3. **How many people were affected by the change?** Was the entire community transformed or just a few people? It is useful to know how many.

4. **Which target groups were affected by the change?** Change does not happen equally to all stakeholders. Some benefit more than others. You need to be clear about target groups affected.
5. **Was the change intended?** Sometimes change is unplanned, and this presents a learning opportunity providing insight into future programming.
6. **Is the change sustainable?** It is useful to estimate or describe if change is long-lasting and how that might look into the future.
7. **What made the change happen?** How the change came about or what were the key processes leading to it, are essential elements to understanding how to replicate the change. It also helps to verify that the change is a result of your programme and not a result of something else, unrelated to the activities.
8. **How will the change result in a positive difference to people's lives?** Sometimes the implication of change is not understood by outsiders. If you report on an impact, the benefits of change are clear. But if you are reporting on outcomes–more immediate results of activities–the significance of the change may not be obvious.
9. **How do changes compare to baseline information?** You cannot credibly say there was change if you do not describe what existed before.
10. **How do changes compare to what was hoped for or considered realistic?** Similarly to the former question, you need to demonstrate what you expected so that the impact and effect of change are understood.
11. **What evidence do you have for change?** You need to describe evidence so that the audience can decide if it is valuable. There is a big difference, for instance, between statistically reliable quantitative data and anecdotal evidence gleaned from a couple of people. It is, though, acceptable to use anecdotal evidence, you only need to be clear what the evidence is. Do not report anecdotal evidence as if it was rigorous data.
12. **How was any change attributable to the work of your organisation or partners?** It is not always easy to attribute change to work you do or allow you to be definitive about the change. To be taken seriously, it helps if you indicate your level of confidence and allow for other possible reasons for any change.

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Communication Planning
CHAPTER VII

Notes:

In this section we explore organisational communication including:
- Identifying and understanding audiences.
- Internal Communication.
- External communication.
- Communicating with donors.
- Media.

You need to **prepare** to communicate. Just as we take time to think of a conversation we will have with family members, considering how they will likely react to any number of approaches, we need to prepare to communicate with audiences. We prepare a script, practice each message, and settle on what we think will work best.

Once we have prepared and designed an approach, we deliver the message. If we are communicating with family members, we evaluate how they receive the message, we look for visual cues to see how they react, we ask for verbal confirmation; we assess whether our communication was effective and produced the outcome for which we had hoped.

Organisational communication is not much different from discourse with family members. We prepare, design, deliver and evaluate outcomes and impact. Organisations need to be systematic and deliberate about their communication; they need to share communication plans with internal audiences, ensuring everyone understands the strategies and goals. The media they use to communicate have to be thought out and optimised.

Know your audiences

Organisations have two audiences: **Internal and External.**

Internal audiences are members of the organisation; board, staff, volunteers, members, and anyone else who might contribute to the functioning of the organisation. Many organisations take internal audiences for granted and do not communicate well with this crucial group.

External audiences are people outside the organisation; donors, media, participants or programme beneficiaries, governments, and the general public. These are essential audiences to win, inform, and motivate. External audiences can be favourable to your organisational objectives, or not supportive.

Understanding your audiences is crucial. Take the time to consider them and think about who they are and how you need to talk with them.

Notes:

Communicating with audiences

Begin communication planning with the following questions:

- What is the objective or action we want as a result of our communication?
- What message or messages do we need to achieve our result?
- Given our audiences, what is the best vehicle for our messages?
- Who is the most effective messenger for various audiences?

Map your audiences

In planning your communication, it is worthwhile creating an audience map, or profile. ThisIt helps to identify audiences and segments, what they respond to, and how to approach them. Below is a sample profiling chart that is useful in communication planning. Be sure to engage your team in developing a communication plan, so that they understand what to say to whom, and how. Ultimately, everyone in your organisation is a messenger or ambassador.

Internal/ External	Audience	Profile	Goal	Key Messages	Outreach	Frequency
Internal	Volunteers	• Mostly youth • Predominantly women • Committed to cause • Use social media	• Keep engaged in our programmes • Mobilise	• We are partners in success • Your efforts are building our community • We are thankful for your support	• Social media group chat programme updates	Weekly
					• Volunteer appreciation event	Annual
External	Donor	• Focused on cause as national priority • Wants results xx • Interested in community development	• Provide regular programme updates • Provide community development updates • Build support for future funding	• Your donation is making a difference in community development • We appreciate your support	• programme update and organisation bulletin	Monthly/ Quarterly
					• Success stories	Post activity
					• Events	Activity defined

The profile of different audiences helps you map your overall goals of communication with them; key messages, outreach strategies and how often you need to engage them. The audience profile attached here is a simple example that is easy to use. Keep in mind that a communication strategy is always evolving. You will need to update, for example, a particular entry as you learn things about key groups. Also, goals will change, key messages will evolve, and frequency will depend on your goals. This is a planning tool.

Internal Audiences

Internal audiences include all those people who are part of your organisation, work for you, are members, or volunteer. Sometimes the importance of internal communication is underestimated, particularly for small organisations. However, well planned and consistent internal communication is essential for any size organisation. For example, volunteers join organisations for different reasons but appreciate that their efforts are valued and recognised.

Leaders of volunteer organisations need to be deliberate in demonstrating that appreciation regularly. Remember, acknowledging the contribution of all volunteers is important and should include those who have not been active in a while, for whatever reason.

Internal Communication

Quite often, the leadership of small volunteer groups will say, «communication plans and systematic communication are important for large organisations. We are small, all friends, and talk all the time; we don't need to document our internal communication systems or policies.»

This reasoning may be valid, and these leaders may be satisfied with the status quo. However, even small groups of friends can benefit from communication planning which ensures everyone talks about the organisation in the same way, receives consistent information, and introduces efficiency when things get busy.

Hold regular meetings

Establishing a schedule of regular or routine meetings is important. Make sure you provide participants with a chance to «get on the agenda» by giving them the opportunity to make presentations, submit reports or provide updates. Allow meeting participants time to prepare (days or hours before the meeting) before asking them to speak.

THINGS TO CONSIDER

- Do not overdo the number of meetings! Very few people are enthusiastic about organisations that spend all their time in meetings.
- Make sure you schedule meetings at appropriate times when your membership or participants can attend without putting stress on work or family commitments.
- Location is important too, you will know best where it is your members can and cannot meet, but the appropriateness of the meeting venue is equally important. Is it conveniently located for everyone? Is it a socially acceptable or secure place for certain participants to attend?
- Ensure people know what to expect, and what is expected from them, before they get to the meeting. People do not want to be put on the spot or embarrassed in a meeting if they are being asked for the first time to contribute for something they have not prepared.
- Each meeting, whether internal or external, should always have a purpose. People will lose interest in participating if they think meetings are useless, and you risk losing credibility.
- Meetings should be structured; agendas can help keep everyone focused, and should be flexible enough to add issues.
- Meetings should be structured and facilitated by a meeting chairperson. This person is responsible for keeping the discussion on topic, respecting time, and giving people fair time to speak.
- It is also important that someone is designated to record the discussions and highlight decision points and agreed-to action items. The recorder, or rapporteur, should note; date and time of the meeting, those in attendance, identify speakers and their key points, decisions made (decision points), action items agreed to, and when the meeting ended or adjourned. The rapporteur should include her or his name on the meeting notes/minutes in case anyone needs to follow up or requires clarification.
- Notes should be cleaned up; the chair of the meeting or leadership of the organisation should review, edit and approve before distributing to participants.

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Sample agenda and meeting minutes template

Agenda	Meeting Minutes
Name of Meeting (Team, Directors etc.) Date, time, location Order of Business • Chairperson's remarks, reading of the agenda • Minutes of the last meeting • Business arising from the last meeting • Programme team updates • Reports • Updates • Administrative business • Any other business • Review decisions and action points • Confirm the next meeting • Adjournment	Follows flow of Agenda: • Type of Meeting (ie. Monthly team meeting, Directors' Meeting, etc) • Date, time, and location of the meeting • Attendance (the names of participants, also indicate who said they could not attend) • Indicate who the chair of the meeting is and who the rapporteur is • Key discussion points and action items • Details of the next meeting • Time of adjournment

THINGS TO CONSIDER

- Agendas are used to focus discussion not limit speech.
- Agendas help to respect and maximise people's time.
- Meeting agendas add to organisational accountability and transparency.
- When possible, make it a practice to distribute agendas in advance of meetings and or invite participants to suggest agenda items.
- At the beginning of a meeting, it is important that people see and consider the agenda and have the opportunity to propose additional items.
- Be flexible, but not irresponsible, with the time people give to meetings. Discussion should be focussed and within the time set for the meeting.

Meeting minutes and records

Most importantly, organisations must be disciplined in recording their meetings and systematically archiving their records. This is necessary because organisations evolve and people come and go. If there is a historical record of decisions and actions available to new members, for example, it will help them understand the institutional evolution of the organisation. It is also an important organisational process tool that ensures people are accountable for their actions and the leadership is better able to monitor progress.

Note

In environments where security and protection of activists is a concern, an organisation has an obligation to ensure its records do not risk the safety and security of its members. If there is a security risk to people, if an armed group obtains meeting minutes for example, and peoples' names are on meeting notes, it may put them at risk. Some organisations choose not to put names of their participants on meeting notes, or use initials only, or provide pseudonyms.

Using technology to communicate with internal audiences

Technology provides excellent opportunities for teams to communicate rapidly and collaborate on work. Limited access groups can be established allowing teams to exchange information in real time. Many civil society organisations make good use of Facebook Messenger and Groups, Viber Groups, WhatsApp groups, as well as Skype groups. While these platforms are excellent for real-time conversations, chatting and quick exchange of information, groups need to be careful that they do not become a substitute for formal meetings or channels of reporting. This is important because; infrastructure is not always reliable, administrators can leave organisations (and histories of chats or document uploads could be wiped out), and security breaches can occur.

Collaborative team environments are becoming more common and contribute to an organisation's efficiency. Cloud-based storage and workspaces allow people to work on and share documents, forms, and other work products. Collaborative team environments also enable organisations to store valuable information in relatively secure environments. Collaborative spaces do, however, need to be responsibly managed and thought out. Limiting access to sensitive documentation is essential; financial or human resource files for example.

THINGS TO CONSIDER

- Use technologies that the majority of the team is most comfortable with and are easily used in the environment in which you operate. Avoid using multiple platforms, as information is sometimes lost or unintentionally ignored.
- Do not let informal shorthand communication channels become replacements for formal meeting and reporting systems within the organisation.
- Be aware, and understand, legal requirements and obligations related to data protection and privacy. Ensure that whatever data storage options you use, provide the maximum protection for the right to privacy-related information.
- Implement systems to clean chat histories, backup and secure important information, and ensure that information shared digitally does not put computing systems, devices or people at risk (viruses, inappropriate content, etc.).
- Develop protocols for data management that might include checklists; for example, the volunteer that has been managing the online storage of documents is leaving to take a paid job in another city. Has this person transferred administrator rights to someone in the organisation? Has this person left instructions for login including passwords? Will she or he be allowed access after she or he leaves? Do you need to change the system or network passwords?
- Remember, digital information is only as secure as you make it; hackers or human error can compromise your digital world.

Reporting

All organisations need internal reporting that provides the leadership, teams, members and volunteers with information about programmes, administration, policies, objectives, direction and so on. Regular reporting should be standardised; reporting templates, for example, allow for consistency and ensure detailed reporting. However, not all organisations have the same institutional needs and reporting, in some cases, might be oral or verbal reporting at regular meetings. You should, however, archive all reports—or the substance of reports—in a way that future staff or volunteers can access and understand what has happened before.

- **Administrative reporting** often provides information on human resource policy or organisational accountability measures.
- **Financial reporting** is usually intended for leadership audiences

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and or governing bodies (such as general assemblies as well as government regulators). Many organisations that receive grants are required to do monthly, quarterly, and annual financial reporting.

- **Programmatic reporting** advises the leadership of programme progress and informs other teams.
- **Board reporting** is regular reporting to the board of directors by the organisational leadership team. A board report is usually a consolidation of all organisational reports and often provided on an annual basis.

Member and volunteer-based organisations must keep constant communication with key internal audiences. Volunteers and members contribute time, resources, and money to programs, events, and initiatives to support organisational objectives. They need to stay informed of the organisation's activities, successes, and strategic direction – and be recognised for their contributions. They also need to be heard and given the opportunity to communicate with the leadership of the organisation.

External Audiences

Quite often people think of external audiences in broad terms; «the public», «the media», «the government», «donors» and so on. This expansive view has some use, but it does not account for more specific audiences within that broad category. For example «the public» is too broad an audience for most community-based organisations to develop profiles, and to effectively communicate with.

CBOs should segment «the public» when developing communication strategies. There are gender segments; men and women; geographic divisions; age groupings; professional categories; to name a few. Do not get overwhelmed thinking about this; begin with your most important audience segments.

Importantly, we can segment audiences along the lines of «supportive» and «not supportive.» Supportive are groups of people who are generally receptive to what you do and open to communication. Not supportive segments of audiences are not necessarily opponents, but they may just not be interested in or care what you do, and contact with them has to be tactical, particularly if you intend to either make them supportive or want to neutralise their impact to your broader communication strategy.

Message development

The purpose of communication is to get someone, or a group, to do something or to act in a way you want. Your message is the point of your communication, and it must be understood to be effective.

In developing a message, ask yourself:

- What does the audience need to hear to do what I need them to do?
- What is important to them?
- What has worked with them in previous communication?
- How can I reinforce my central message with facts, or appeal to emotion?
- How can I reinforce my message by enlisting secondary messengers who influence my target audience?

Once you have developed a couple of potential messages, try testing them on a small group of people you trust to provide honest feedback. In political sectors, messages are tested frequently with focus groups that are representative of target audiences. While most community-based organisations do not have the resources to hold frequent focus groups, they can still test messages.

You should deploy your message through media to which your target audience responds best. Remember that in-person communication is the most effective, because reactions are usually instantaneous, and that feedback allows you to adjust or reinforce your message.

In advertising, we learn that repeating messages has a greater impact. An organisation may deliver a message to a target audience in person, and then follow up with a letter or email, and use social media advertising to place messages in target audience accounts. Your message should be repeated, even if you enlist secondary tools.

Always take the time to evaluate the effectiveness of your message. If you do this during a campaign, for example, you can make adjustments if it is not having the intended impact on your target audience.

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Telling your story, for donors

Take every opportunity to talk about your organisation and the work that you do. Develop short biographies of your organisation and programmes, that you can leave with, or send to, potential donors. These should highlight the **IMPACT** and not necessarily the **ACTIVITIES** of your organisation. Donors are more interested in people and organisations that bring about changes in given areas. Which of the following example statements is more compelling?

«We trained 200 people in 10 cities and raised awareness about gender-based violence. The 200 participants now understand the rights of victims and community-based support available to them.»

«As a consequence of training 200 people in 10 cities about the rights of domestic violence victims, participants identified five people and secured them legal representation and psycho-social professional help.»

The second statement, which talks about the impact of the activity, is more compelling. While providing information on your activities is important, make sure you focus on what really interests people—your **impact**. What interests donors is your ability to bring change and influence attitudes and behaviour.

Traditional media

For the most part, television, radio, and print media are first and foremost businesses. They develop and package information and try to expand their audience so they can attract subscriptions and or advertisers. It is, therefore, crucial for community-based organisations, which cannot afford to purchase advertising, to prepare for their media engagement.

You should research media outlets, understand who, within the outlet, makes decisions about what goes on air or gets published. For example, journalists rarely have the power to decide what appears on the news. The news editor or editorial committee usually make that decision. If you know who is in charge of those decisions you can target them directly with your news stories.

Keep in mind that news outlets compete for audience share and advertising. So your news stories must be well planned and have compelling information to convey. Take the time, for example, to talk with potential spokespeople who can speak on behalf of your organisation for an event or a campaign you are implementing. These «spokespeople» do not have to be members of the organisation; they can be participants, guests, or members of the public. However, if you have surrogates speaking about your organisation or event, make the time to ensure they have the information you want to convey.

Make telling your story easier for media outlets

All organisations should have materials ready to provide to interested individuals or groups. The material can include; information about the organisation, biographies of key personnel, background on events or campaigns, and contact information. Many organisations will have this prepared information in packages ready for distribution.

Press and broadcast releases

Prepare press and broadcast releases for the media in such a way that they can print or air what you have given them. Journalists do not always have time to research you and your group or follow up on activities to which you have invited them. If you pre-package that information, however, they are more likely to use and disseminate it.

You should write a press or broadcast release as if it were a script for the journalist covering your event. Ensure the lead or first paragraph contains all the information answering; Who? What?

Where? When? Why? Most news stories that air are usually relatively short in length (depending on its newsworthiness); 30 seconds to three minutes.

Sample templates for press releases are appended at the end of this **toolkit**.

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Media Checklist

Do not rush into an engagement with media. Use the following checklist before talking with a reporter or journalist.

- Who contacted me for the interview, or comment?
- What is her or his deadline?
- Am I authorised to talk to the media? If not, to whom shall I refer them?
- Where and when will the interview be?
- Is the location the most appropriate, or do I need to negotiate a change?
- Who is conducting the interview?
- What topics does she or he usually cover and how?
- What topic does she or he want me to discuss?
- When or where will the interview be broadcast or printed?
- Do I need to check with anyone/ or get approval for my talking points?
- Do I know what our core message is?
- Have I rehearsed my remarks, or answers to possible questions?
- Can I record a copy of the interview myself?

Dealing with journalists

Journalists deal with timelines, and they may not have much time to get a comment or attend your event. Be accommodating as possible, without losing control of communicating your core message.

If you do not have the information the journalist wants, **do not make it up!** Let the journalist know you will find the information and get back to her or him. If you say you will follow up with a journalist, make sure you do, and promptly.

Feel free to negotiate conditions of an interview. You cannot control what the journalist ultimately reports, but you can try to negotiate the terms of an interview including the location of the interview, time, and even suggest some questions that allow you to get your intended message out.

Practice communicating your message in front of a mirror, or have a trusted person role play the journalist asking questions. Remember to repeat your message.

Editors often assign journalists to cover a specific story. Sometimes it is not the story you want to tell. A reporter might try to get you to speak to another story by putting words in your mouth, «Would you agree or say that …» is a device often used to get you to speak to the issue in which they are most interested. Avoid saying yes. Try: «What I want to say is [insert your message]...»

Messengers

An organisation should enlist its members, volunteers, and board members as messengers. While they may not be authorised to speak to the media, they do talk to members of the community, friends, and family. Preparing speaking notes for these messengers helps to ensure everyone is speaking about

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the same thing in the same way. It is a form of message discipline and allows for repetition of key messages.

Preparing talking points for secondary messengers is very effective. Be sure to give your team the tools they need to promote the organisation and or events.

Talking points

Talking points help your messengers know what can—and should—be said to media or the broader public on an issue. Talking points can also include responses to likely questions, not only key messages.

EXAMPLE: TALKING POINTS

Issue: Next tuesday the Friends of Clean Spaces environmental organisation will hold a press conference launching its Clean Streets initiative.

Core Message: Volunteers from Friends of Clean Spaces will begin its Clean Streets initiative to pick up rubbish in parks and public spaces to ensure the safety of children and families.

Possible Question: City employees who pick up garbage might get angry?

Response: Friends of Clean Spaces are going to clean parks and public spaces, we will complement the work of city employees, not replace them.

Possible Question: Are you concerned about the safety of cleaning rubbish, what precautions will your volunteers take to ensure they are not hurt?

Response: Friends of Clean Spaces' Clean Streets initiative will provide protective gloves, masks and smocks to volunteers cleaning parks and public spaces in our city.

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CONCLUSION

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This **toolkit** endeavours to provide ideas and guide organisations as they develop and grow. Regardless of the size or thematic focus of community-based organisations, it is good practice to establish internal systems that allow for efficient use of scarce resources, holds members of the organisation accountable to one another and their supporters, and lends to more impactful programming.

The sections, above, were selected and presented based on what the authors believe are the essential ingredients for effective non-governmental organisations. Most certainly, each component can be explored in much more detail; in fact, entire academic disciplines are dedicated to each. However, the **toolkit** presented here provides information on the most common needs of growing organisations, typically operating in transitional countries.

We hope organisations using this **toolkit** gain skills and experiences that allow them to explore and adapt components in greater detail and to productive effect as their teams grow. There are an extraordinary number of resources online that provide detailed information for organisations.

The work of non-governmental organisations is critically important in sustaining communities. They are key contributors to development and are the thread in a nation's fabric. For countries transitioning to democracy, it is this grassroots engagement that provides the foundations for inclusive rights-based societies and an engaged population, which are fundamental to democracy. Democracy is not something that simply happens to us; it is the constant and collective actions of its citizens.

APPENDIX

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Example of Press Release—For all media audiences

PRESS RELEASE

(Large bold and colourful Press Release allows editors to quickly identify what information is before them)

For (Immediate or Future date) Release
(Often, press releases are sent days before the event, allowing editors time to plan allocation of journalists, you may want to delay public distribution of your information so indicate here if the release can be publicised immediately, or at a future date—it doesn't guarantee they won't use it immediately though.)

Attention (News Editor)

April 5, 2020 (use the date of the event, even if you are sending in advance)

Big Announcement About Our Team

London, UK—This is the **lead paragraph**, the first, in which we describe our story; the who, what, where, when, and why. The essence of what you want an editor or journalist to know about your newsworthy story should be written here. Imagine that they publish only one paragraph about your story, this should be the one.

The body of the press release provides supporting information related to your lead. The ideal total length of a press release should be one page, because editors will have lots of information before them as they decide what makes it into their paper, or broadcast to audiences. If you have more information you think is important, consider adding a separate document called a «backgrounder», which simply provides additional information.

Use quotes from people within your organisation or those authorised to speak with media to add texture to your release. «It gives a human touch to a news story.» Said the author of this example.

-30-

(this indicates the end of the story, it is a convention used in media relations you can equally use -END-)

Media Contact: (always ensure someone is indicated as contact, and that they know about the story and can answer questions)

Adam Press, Communication Director
Fictitious Organisation
Phone: 1234-555-6789
Email: APress@fictitious.net

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APPENDIX

Sample Broadcast Release—for television and radio broadcasters

BROADCAST RELEASE

(Large bold and colourful Press Release allows editors to quickly identify what information is before them)

For (Immediate or Future date) Release
(Often, press releases are sent days before the event, allowing editors time to plan allocation of journalists, you may want to delay public distribution of your information so indicate here if the release can be publicised immediately, or at a future date—it doesn't guarantee they won't use it immediately though.)

Attention (News Editor)

April 5, 2020 (use the date of the event, even if you are sending in advance)

Big Announcement About Our Team

London, UK—This is the **lead paragraph**, the first, in which we describe our story; the who, what, where, when, and why. The essence of what you want an editor or journalist and the audience to know about your newsworthy story should be written here. Write it as a broadcaster might read it on radio or television, and if all the information they use is in this paragraph, at least the important information gets out.

The body of the broadcast release provides supporting information related to your lead. The ideal total length of a broadcast release depends on the average length newsreaders in various markets allocate to stories—20-30 seconds is average for news bulletins on BBC World Service for example. The lead is very important if you only have 30 seconds.

-30-

(this indicates the end of the story, it is a convention used in media relations you can equally use -END-)

Media Contact: (always ensure someone is indicated as contact, and that they know about the story and can answer questions)

Adam Press, Communication Director
Fictitious Organisation
Phone: 1234-555-6789
Email: APress@fictitious.net

APPENDIX

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Sample Logical Framework Template

	Indicators WHAT is measured	Verification HOW indicators are measured	Risks and Assumptions External events that may affect achievements
Impact/Goal/Overall Objective:			
Outcome/Specific Objective:			
Outputs/Expected Results:			
Activities/Interventions/Inputs:			

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APPENDIX

Template for data protection policy

The following template was developed by White Fuse and is available on the website of the International Association of Privacy Professionals (IAPP) for use by British charities (NGOs). While the template references General Data Protection Regulations of the European Union, the template is useful to any community-based organisation to adapt as it develops a data protection policy

Beginning of template:

Data Protection Policy
[Insert charity name]

Note about this policy template: Lots of template policies are unhelpfully long and simply reiterate large portions of the legislation. This template is different: it aims to provide a concise and practical document that can be used by trustees of small charities as the foundation for a working Data Protection Policy. If you have any doubt about your legal obligations you should always check with a lawyer.

Last Update	

Definitions

Charity	means [insert charity name], a registered charity.
GDPR	means the General Data Protection Regulation.
Responsible Person	means [insert name of person responsible for data protection within the Charity].
Register of Systems	means a register of all systems or contexts in which personal data is processed by the Charity.

1. Data protection principles

The Charity is committed to processing data in accordance with its responsibilities under the GDPR.

Article 5 of the GDPR requires that personal data shall be:
a. processed lawfully, fairly and in a transparent manner in relation to individuals;
b. collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes; further processing for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes shall not be considered to be incompatible with the initial purposes;
c. adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed;
d. accurate and, where necessary, kept up to date; every reasonable step must

be taken to ensure that personal data that are inaccurate, having regard to the purposes for which they are processed, are erased or rectified without delay;
e. kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the personal data are processed; personal data may be stored for longer periods insofar as the personal data will be processed solely for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes subject to implementation of the appropriate technical and organisational measures required by the GDPR in order to safeguard the rights and freedoms of individuals; and
f. processed in a manner that ensures appropriate security of the personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures.

2. General provisions

a. This policy applies to all personal data processed by the Charity.
b. The Responsible Person shall take responsibility for the Charity's ongoing compliance with this policy.
c. This policy shall be reviewed at least annually.
d. The Charity shall register with the Information Commissioner's Office as an organisation that processes personal data.

3. Lawful, fair and transparent processing

a. To ensure its processing of data is lawful, fair and transparent, the Charity shall maintain a Register of Systems.
b. The Register of Systems shall be reviewed at least annually.
c. Individuals have the right to access their personal data and any such requests made to the charity shall be dealt with in a timely manner.

4. Lawful purposes

a. All data processed by the charity must be done on one of the following lawful bases: consent, contract, legal obligation, vital interests, public task or legitimate interests (see ICO guidance for more information).
b. The Charity shall note the appropriate lawful basis in the Register of Systems.
c. Where consent is relied upon as a lawful basis for processing data, evidence of opt-in consent shall be kept with the personal data.
d. Where communications are sent to individuals based on their consent, the option for the individual to revoke their consent should be clearly available and systems should be in place to ensure such revocation is reflected accurately in the Charity's systems.

5. Data minimisation

a. The Charity shall ensure that personal data are adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed.
b. [Add considerations relevant to the Charity's particular systems]

6. Accuracy

a. The Charity shall take reasonable steps to ensure personal data is accurate.
b. Where necessary for the lawful basis on which data is processed, steps shall be put in place to ensure that personal data is kept up to date.
c. [Add considerations relevant to the Charity's particular systems]

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7. Archiving / removal

a. To ensure that personal data is kept for no longer than necessary, the Charity shall put in place an archiving policy for each area in which personal data is processed and review this process annually.
b. The archiving policy shall consider what data should/must be retained, for how long, and why.

8. Security

a. The Charity shall ensure that personal data is stored securely using modern software that is kept-up-to-date.
b. Access to personal data shall be limited to personnel who need access and appropriate security should be in place to avoid unauthorised sharing of information.
c. When personal data is deleted this should be done safely such that the data is irrecoverable.
d. Appropriate back-up and disaster recovery solutions shall be in place.

9. Breach

In the event of a breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, personal data, the Charity shall promptly assess the risk to people's rights and freedoms and if appropriate report this breach to the ICO (more information on the ICO website).

END OF POLICY

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BCI experts determined that the subject matters covered in this toolkit represent fundamental organisational conditions for nascent civil society or community-based organisations. The information contained within this document is a guide to building foundations. This toolkit is not a comprehensive or definitive work on all the processes and procedures available to organisations, but a simple guide to the essentials.

This toolkit complements organisational trainings held for participants in the Ante Raeda program; compiling modules developed for small to medium size organisations and providing guidance where gaps may exist in internal policies, procedures, or skills sets.

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INSTITUTE FOR WAR & PEACE REPORTING

I W P R