



**SOCIAL DEVELOPMENT
COMMISSION**
Building Communities...Building Jamaica



*Empowered lives.
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CAPACITY BUILDING TRAINING MANUAL

For Community Development Committee Leaders



- GENERAL RECORD KEEPING
- EVENT PLANNING
- FUND RAISING
- PROJECT PROPOSAL WRITING
- PROJECT MANAGEMENT

NOVEMBER 1, 2017

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Communities: Building Resilience to Support Citizens Safety and Social Cohesion in West Kingston**



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CAPACITY BUILDING TRAINING MANUAL

FOR COMMUNITY DEVELOPMENT COMMITTEES

Under the

**Rejuvenating Communities: Building Resilience to Support Citizens Safety and
Social Cohesion in West Kingston**

First Edition

MAIN CONTRIBUTIONS FROM

***Social Development Commission's Governance, Training Departments and Kingston
and St Andrew Parish Office, United Nations Development Programme***

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This manual is NOT for sale.

TABLE OF CONTENT

CONTENT	PAGE NUMBER
PREFACE AND ACKNOWLEDGEMENT	2
GENERAL RECORD KEEPING	
What is a Record?	4
Types of Records	4
Steps in Record Keeping	5
What is Filing?	8
Steps in Filing?	8
EVENT PLANNING	
What is an Event?	11
Steps in Event Planning	11
FUND RAISING	
What is Fundraising?	22
Types of Fundraising	23
Financial Planning for Fundraising Event	24
Timing and Monitoring of Fundraising Event	25
PROJECT PROPOSAL WRITING	
Project versus Programme	28
Project Identification	29
Project Proposal Writing	30
Steps in Project Proposal Writing	31
Proposal Writing Tips	38
What Do Donors Look For ?	39
Strengths and Weaknesses of Proposals	39
Successful Project Proposals	39
PROJECT MANAGEMENT	
Introduction to Project Management	40
Project Manager	42
Project Life Cycle	44
Project Organizational Structure	45
Project Implementation	45
Garnering Community Support for a Project	48
Acronyms	50
References	51

PREFACE

This manual outlines five (5) competencies that are needed to enhance the functions of specific Community Development Committees (CDCs).

These competencies were informed by the findings of assessments conducted by the Social Development Commission (SDC), where the weaknesses of the CDCs were identified. These competencies are standardized CDC training modules which indicate that the due process of the necessary research, retrofitting and conversion of content to training material was duly completed.

This manual is divided into five (5) Modules namely: General Record Keeping, Event Planning, Fund Raising, Project Proposal Writing and Project Management.

Each module is structured similarly with project emphasis being placed on the “*what is*” (definitions) and the “*how to*” (methodology/steps) of the topic.

The manual also has some matrices and diagrams which serve as examples for different areas of each topic.

ACKNOWLEDGEMENTS

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RECORDS

WHAT IS A RECORD?

- *“Document (s) that memorializes and provides objective evidence of activities performed, events occurred, results achieved, or statements made.”*
- *“Records are created/received by an organization in routine transaction of its business or pursuance of its legal obligations. A record may consist of one or more documents.”*
www.businessdictionary.com

TYPE OF RECORDS

There are three main types of records:

Administrative

- Documents relating to personnel, supplies, and other administrative operations common to all organizations. Examples of administrative records are:
 - Membership List
 - Attendance Register
 - Minutes of General/Executive Meetings

Financial

Formal documents representing the transactions of a business, individual or other organization. Financial records maintained by most companies include a statement of retained earnings, cash flow, income statements, the company's balance sheet and tax returns. Keeping financial records organized is a critical element of a successful business. Examples of financial records include:

- Invoices
- Record of contributions (dues)
- Cancelled cheques or copies of cancelled cheques
- Certificates of deposit or other evidence of savings

Legal

“A written memorial made by a public officer authorized by law to perform that function, and intended to serve as evidence of something...” www.lectlaw.com

Examples of legal records include:

- Articles of incorporation/association
- Constitution/By-laws

- Minutes of annual and special general meetings

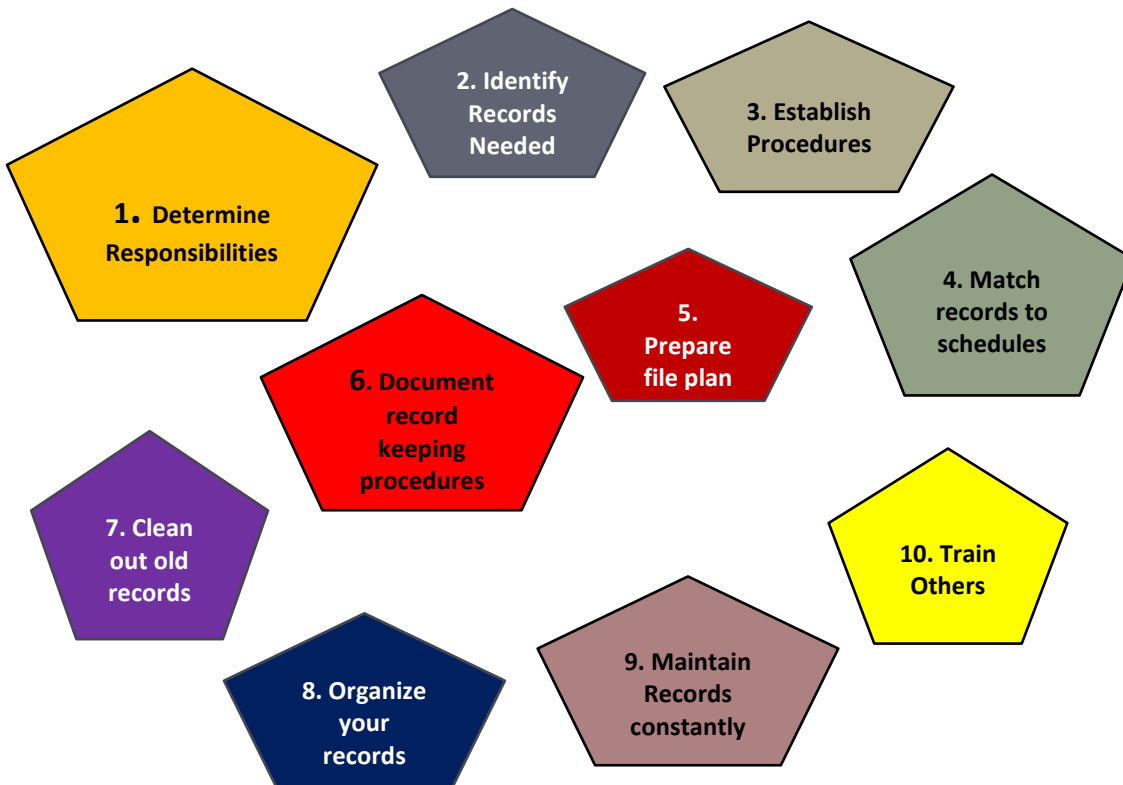
RECORD KEEPING

WHAT IS RECORD KEEPING?

Record Keeping is a systematic procedure by which the records of an organization are created, captured, maintained, and disposed of. This system also ensures their preservation for evidential purposes, accurate and efficient updating, and control of access to them only by authorized personnel.

STEPS IN RECORD KEEPING

There are ten (10) steps involved in record keeping. They are as follows:



Step 1. Determine Responsibilities

Determine who will be responsible and what resources will be needed. Establish a project team.

Step 2. Identify records needed to document the activities and functions of your office

Conduct an inventory of the materials in your office. Document, at a minimum, where materials are located, how much there is, and the format (e.g., paper, electronic, maps, etc.).

Step 3. Establish your Procedures (Record Keeping Requirements)

Now that you know what you have in your office, the project team needs to determine:

- If records will be kept in a "centralized" or "decentralized" area
- The type of documents that are included in the record files
- How to draft documents, working papers, and correspondence, and how copies will be handled
- Who will be responsible for maintaining the record copy (records custodian)?

Step 4. Match your records to the Records Schedules

The next step in the cycle is to match the records identified in your inventory with the *Records Schedules*. Records Schedules provide information on how long records are to be kept in the office and what happens when they are no longer needed in the office. Retention periods as stated in the schedules are mandatory.

Step 5. Prepare a "File Plan"

Now that you know what records you have and what the appropriate Records Schedules are, you can begin to organize them.

Step 6. Document your record keeping requirements and procedures

Prepare a document, a *File Plan*, which gives details on:

- How your records are organized and maintained
- Who is responsible for doing what
- When it should be done (e.g., annual file retirement)
- What happens to the records when they are no longer needed in the office?

Include all the decisions you made in steps 1 through 5 (e.g., what happens to draft documents).

Step 7. Clean out records which are beyond the approved retention periods

Once you have documented your file plan you can begin to organize your records. First, however, it is a good idea to get rid of those materials in your office which are not needed. If authorized by the records schedule, you can.

Step 8. Organize your records

Now you can begin to implement your File Plan. First, prepare folders and organize documents within the folders. Follow the procedures established in your File Plan.

Place reference sheets in folders, when necessary, to refer users to the location of related non-paper materials such as maps, drawings, videotapes, etc.

Organize electronic documents (e.g. Word documents, e-mail messages) residing on individual computer or local network directories using the agency file codes.

Step 9. Maintain your records on an on-going basis

Once everything is organized, it is essential to keep it current and up to date.

Be sure to:

- File new materials on a regular basis (e.g. Weekly)
- Protect records containing confidential information such as sensitive business information or personal information
- Establish a checkout system (e.g. "Out" cards) to track the location of your records so you always know where they are
- Clean out inactive materials on a regular basis, usually at the end of the year (as per your written procedures)
- Retire eligible records
- Clean out superseded or obsolete reference materials

Step 10. Train, train, train

Once you have developed your systematic procedures, you can now train others to master its usage and to ensure maintenance of the system.

FILING SYSTEM

WHAT IS A FILING SYSTEM?

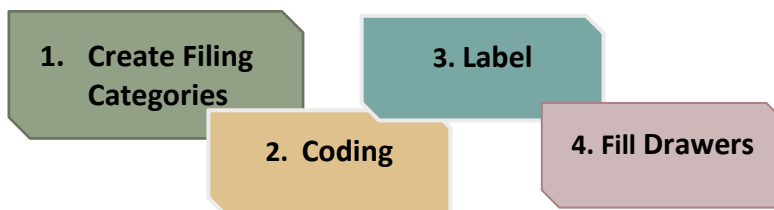
Critical to your record keeping system will be your filing system.

A filing system is the way that documents and files are organized, on a computer or in an office.

STEPS IN FILING

There are four steps in the process of filing.

They are as follows:



Step 1- Creating File Categories

Look at your current filing system (or that pile of paper that you've been meaning to file for months) and start sorting your documents into broad categories. Finances might be one; administration could be another. At this point, we're not focusing on the detail of your filing system.

Pick one of your "major category" piles and let's sort through it again. This time, think about breaking your paper into smaller subcategories. For example, your "finances" pile could be divided into:

- Savings Account
- Chequing Account
- Petty Cash

Step 2- (Colour) Coding

Each major category of paperwork should be assigned a different colour (your choice) – and then we're going to put each of its subcategories into an individual hanging file folder. In the example above, "finances" might be green, and each of your accounts gets a separate green file folder. It seems like a small thing, but colour-coding your system will save you a considerable amount of time in filing and retrieving paper.

Being able to look in your file drawer and see distinct bodies of information broken out by colour just makes sense to your brain. When you know that your financial section is green, your house section is blue and your car papers are in red, you don't even have to think because your hand just naturally goes to the right part of your file drawer.

Step 3- Label Making

Now that everyone has their coloured folder, we need to label each file. When creating your labels, move from general to specific. Don't tell me you are filing paperwork for your "Visa credit card" – call it "credit card: Visa". When you arrange your folders alphabetically, all of the "credit card" files (no matter how many you have) – will be together in your "finances" section.

Our goal is to keep related files near each other. Do this again and again for every grouping of files until you have labelled every file in each major category.

Step 4- Filling Your Drawer

All you have to do now is put the files within each major category in alphabetical order, and then put the significant categories themselves into the drawer in alphabetical order.

Place the coloured folders in hanging box bottom folders to keep them upright in the drawer. The 2/5 cut tabs show above the hanging files, and the tabs are in a straight line for easy reading.

Whenever you need to find a document or put something in a folder, just look first for the correct major category (easily identified by both the labels and the colour).

With the right file system, it's easy to put your hands on the correct file without a lot of searching.

EVENT PLANNING FOR CSOs



EVENT PLANNING FOR CSOs

MODULE 2

2017

Rejuvenating Communities: Building Resilience to Support Citizens Safety and Social Cohesion in West Kingston



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EVENT DEFINITION

WHAT IS AN EVENT?

A public assembly for celebration, education, marketing or reunion. Events can be classified by their size, type and context. (www.eventeducation.com)

- Education and career
- Sports
- Entertainment
- Political
- Religious
- Fundraising/ cause related

STEPS IN EVENT PLANNING

USEFUL QUESTIONS:

- Why are we doing the event?
- Whom do we want to participate in the event?
 - Gender, age, etc.
- When is the best time to do this?
- Where is the best location to do this?
- What are the resources we have to make it happen?
 - Money, expertise, etc.
- What are the outcomes we expect to achieve?

STEP 1-PRELIMINARIES

Define the event's objectives

- Ask "What are the objectives/ goals of having this event?"
 - Whom do I want to participate in this event?
(Don't just look at the obvious, but also the edge)
- **Objectives should be SMART to be successful**

NB: *It is recommended that any one event should not have more than four (4) objectives*

SMART Objectives

- **Specific** - How much of what is to be achieved
- **Measurable** - Records can provide information about objectives
- **Achievable** - They can be accomplished
- **Relevant** - They fit in with the vision and mission of the organization
- **Timed** - They must be achieved in a specific time

STEP 2-GET ORGANIZED

- Organize all thoughts and ideas based on objectives on a piece of paper
- Cut the fat to the attainable and doable (most feasible).
- Don't reinvent the wheel.

Planning the Event

Many different substructures will have to be drawn to make the event successful.

These include, but are not limited to, the following:

- Organizing Team
- Agenda
- Dates
- Budget
 - Costs of the event
 - The income to be raised
- Promotion
- Media
- Logistics

STEP 3-THE ORGANIZING TEAM

- WHY?** To plan, implement, and evaluate the event
- WHO?** A coordinator/leader and a good recorder
- WHAT?** Input from all members and regular meetings

Characteristics:

- A group of well-rounded dedicated people that can work together
- A group capable of making decisions and completing tasks
- A group that recognizes when and what to delegate
- Experience with the event is desirable

When allocating tasks:

- Fit members into roles they are comfortable doing and can complete
- Try to get more than one person assigned to any task, but one must be held responsible
- Keep an accurate record of completed tasks and whose responsibility

STEP 4-THE AGENDA/ WORKPLAN

- The agenda is a list of the main tasks that need to occur to ensure a successful event
- The agenda is set by working backwards from the objectives to determine all necessary tasks to be completed
 - For the event to be successful; time delegation is probably the most important task. Ensure there is sufficient time to plan, discuss, and host.

Major tasks include:

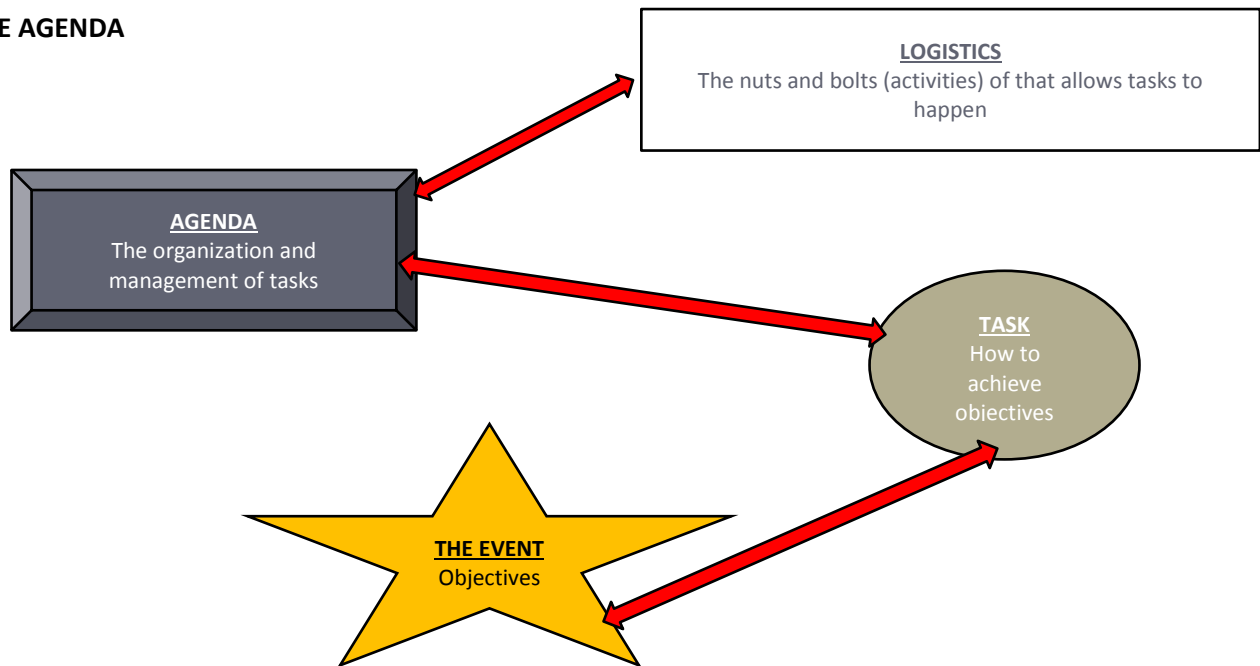
- Venue
- Invitations
- Props
- Materials
- Response Team – (To enquiries & confirmations)
- Transport
- Budget
- Staff

Other important tasking items include:

- Staffing needs
- Date and time setting
- Conflicting events

Understand that as tasks are completed and information becomes available the agenda changes. Hence, the need for regular meetings and good recording.

THE AGENDA



When we think about an event we set objectives, tasks are the main strategies for achieving objectives. Tasks are organized into an agenda which outlines all tasks to be done to achieve objectives in a logical sequence. This sequence is the logistics which are the activities which allow for the successful staging of an event. In reverse, logistics ensure a successful agenda, successful agenda ensures that tasks are achieved effectively. If tasks are achieved effectively, then the objectives of the event are met, hence a successful event.

TASK IDENTIFICATION AND AGENDA

Notice that the tasks are not very detailed, they are pointed but broad. Dates are also not very specific either. The tasks as listed in the “Task/Agenda” column is the agenda

OBJECTIVE	TASKS/AGENDA	BY WHEN	WHO RESPONSIBLE	COMMENTS
To raise at least \$200,000 towards the hosting of the annual back to school treat the last week of August 2014	Identify suitable venue	1 st week of July 2014	John Brown and Sub Committee	
	Identify potential sponsors	As of June 5, 2014	Mary Jane and Sub Committee	
	Prepare and distribute tickets for sale	By mid July 2014	John Tom and Sub Committee	

Task/Agenda is then detailed in an action plan. This sample action planning matrix represents the logistics/activities for the completion of a task “identify suitable venue”.

OBJECTIVE: To raise at least \$200,000 towards the hosting of the annual back to school treat the last week of August 2014

Tasks	Priority Actions	When	Who Responsible	Support Needed from The Who	What can go Wrong?	If so, then what?	Indicators of success
Identify suitable venue	List potential venues	June 10	Ms. Peggy	Mary Jane	List not completed on time	Complete list by June 11	Comprehensive list of all venues in the community
	Visit and Assess venues listed	June 12 - 19	John Brown	Ms. Peggy	Venues not accessible	Revisit those venues	Assessment reports Shorten the list of venues
	Check availability of selected venues	June 20-23	John Brown	Mary Jane	Owners not located	Find alternative personnel	List of available venues
	Select and announce venue	July 1	John Brown	Planning Committee	No committee meeting	Make informal visits to committee members	Finalized venues

STEP 5-THE BUDGET

What is?

- A means through which an organization maintains control over its finances through:
 - Accountability
 - Efficient Performance

- Monitoring and Assessment
- Efficient Planning

Budget as a Plan

- Control finances
- Ensure objectives are met
- Ensure sufficient financing of projects/events

Considerations:

- When making up the budget you need to write down everything you have to pay for (**Expenses**), how to raise the monies to pay for them.
- Considerations should also be given to monies that will be made by activities leading up to the event, and activities of the actual event (**Revenue**).

Revenue

Direct Revenue

Monies that come directly from the event which includes but not limited to:

- Participation Fees
 - Admission fees
- Product Sales:
 - Food & Beverage
 - Ticket sales

Indirect Revenue

Monies that don't come from the activities of the event, but may be available to support the event or any other activity/project, etc.

- In-kind contributions
- Grants/Sponsorship/Donations

TIPS FOR PREPARING YOUR BUDGET

- Allow your Action Plan to inform your budget
- Attach a cost to each activity in the Action Plan
 - The sum of the activities will tell the cost of the objective
 - The sum of the cost of the objective will help to determine the cost of the event/ project
- Ensure that you highlight community contribution and put a cost to it

- Seek technical assistance

Sample Budget 1 (Projected Revenue and Expenses)

This type of budget looks at the overall activities associated with the event and projects the income, expenditure and profit to be made. An expense budget should inform the “expenditure” section of the budget. Below is an example of a projected income and expenditure budget.

HEADING	DESCRIPTION	DETAILS	\$	\$	Totals \$
PROJECTED INCOME	Ticket sales	500 tickets @ \$100 ea.	50,000		
	Food sales	300 lunches @ \$150 ea.	45,000		
	Beverage sales	500 assorted drinks @ \$100 ea.	50,000		
Total income					145,000
EXPENDITURE	Venue rental	1 community centres @ \$25,000			25,000
	Tickets	500 tickets @ \$40 ea.			20,000
	Promotion	\$500 flyers @ \$10 ea.			5,000
		150 posters @ \$20 ea.			3,000
	Staff	3 personnel for preparing and cleaning venue @ \$2,500 each			7,500
Total expenditure					60,500
Projected profit (Total income – total expenditure)					84,500

Sample Budget 2 (Expense Budget)

The Expense Budget outlines the cost associated with the different activities that will be done to make the event a success. This budget is informed by the Action Plan which would have detailed the tasks identified on the agenda. The cost of these activities is summed to determine the cost of each objective, and the cost of each objective will be summed to determine the total cost of the event. The following is an example of an expense budget.

Tasks	Priority Actions	Resource Needed	Estimated Cost \$	Total	Funding Source
Identify suitable venue	List potential venues	Research, mapping.	2,000	2,000	Volunteerism
	Visit and Assess venues listed	– Transportation	– 1,500	4,500	Volunteerism
		– Time	– 3,000		Mr Jack Car
	Check availability of selected venue	– Phone calls	– 500	2,000	SDC CDO for printing letters and contract
– Letters, – Contract		– 1,000 – 500			
Select and announce venue	– Down payment	10,000	10,000	Contribution from MP	
TOTAL for OBJECTIVE				18,500	

STEP 6 - PROMOTION

The success of most events is dependent on the level of support that it garners.

The promotion of the events is key to getting the support needed to meet or exceed the objectives of the events.

There are several methods for promoting your event, below are some that can be utilized based on available resources.

<ul style="list-style-type: none"> • Word of mouth/ Face to Face • Telephone/Letters • Announcements at preceding events 	<ul style="list-style-type: none"> • Internet apps • Leaflets/ Flyers/ Posters • Advertising in print / Audio/ TV (Press)
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Written or Printed Promotions

Written or printed promotional items such as leaflets, flyers, or posters should have some crucial information. The list below is information that should always be on your written or printed promotional items.

- Name of event- choose a “*Catchy Title*” Line
- Location with start and finish times
- Contact details
- Cost

Nb. *Be creative with picture, colours, etc.*

Media

Media Coverage is the best means of letting people know about your event, what it is, and why you are having it. The objective is to get journalists, editors and others interested enough to cover your event.

This coverage may include:

- Interviews- radio, print, TV
- Articles- including photos
- News coverage- To take advantage of news coverage- get a friendly celebrity to endorse the event

Be Proactive

- Issue Press Releases
- Call in to radio talk shows
- Purchase some advertising
- Use internet apps. Facebook, etc.

Press Release

A press release is a written communication that outlines specific, but brief information about an event.
(www.thebalance.com)

Press releases should always include the following:

- Title
- Logos
- What
- When
- Where
- Why Contact info

Try to issue the press releases four (4) to six (6) days prior.

STEP 7 - POST EVENT

There are three (3) significant activities that an organization should ensure is done after hosting an event:

- ***Debrief***
 - Revisit the objectives of the event and determine to what extent they were met
 - Note all that went well and all that could have been done better
 - Note recommendations for events
 - This is usually done in a debriefing session or a post event meeting

- ***Follow up***
 - Thank you to - sponsors, speakers, staff, hosts, caterers etc.
 - Written communication along with announcements are two media that can be used for follow-up activities

- ***Returns***
 - All items as borrowed

FUNDRAISING



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WHAT IS FUNDRAISING?

“RAISING MONEY FOR A CAUSE OR ENTERPRISE”

Source: Training for Community Based Organizations; Module 3. Financial Management & Fundraising

It is the process of gathering voluntary contributions of money or other resources, by requesting donations from individuals, businesses, charitable foundations, or governmental agencies. (<https://en.wikipedia.org/wiki/Fundraising>)

EXAMPLES OF CAUSE & ENTERPRISE

A cause may be defined as a reason, purpose or motive for raising funds.

Examples:

- *Repairing School*
- *Providing breakfast for students*
- *Community beautification*
- *Feeding the elderly*

An enterprise is a venture, income generating, activity or project. It is much broader than a cause which may be classified as a project. An enterprise is more related to a long-term program. An example of an enterprise is:

- *Provide capital for an income generating activity, e.g. block making, hair dressing, “Buy & Sell”, banana chips project, photocopying service, internet services*

WHO IS RESPONSIBLE FOR FUNDRAISING?

For most organizations the treasurer is the primary person responsible for Fundraising. However, fundraising is not only the responsibility of the keeper of the Funds such as the Treasurer/Assistant Treasurer. The Management Team is also accountable for funds in the organization.

The members of the Management Team are responsible for Fundraising should possess the following characteristics:

- Honest
- Responsible
- Well respected
- Able to give an account of all money movements
- Able to keep accurate records

WAYS OF ATTAINING FUNDS

There are two (2) main ways of attaining funds and accessing existing wealth.

- Creating new wealth - this means the CBO earns its income
- Accessing existing wealth- this means the CBO asks for donations, grants or loans

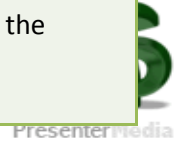


TYPES OF FUNDRAISING

There are different types of funds, various types of fundraising also have their advantages and disadvantages. Below are some different types of funds, examples of those funds, as well as their advantages and disadvantages.

TYPE OF FUND	EXAMPLES	ADVANTAGE	DISADVANTAGE
Earning Own Income	<ul style="list-style-type: none"> • Fundraising • Dues • Charging Rent 	<ul style="list-style-type: none"> -Direct control -Can predict income from one year to the next 	<ul style="list-style-type: none"> -High level of administration and accounting needed -May be difficult to collect money owing
Accessing Funds from Funding Institutions	<ul style="list-style-type: none"> • Foundations • Trusts • Grant Agencies 	<ul style="list-style-type: none"> -Large amounts may be available 	<ul style="list-style-type: none"> -Detailed proposals required -Long time to get money -Detailed reports on project progress required -<u>Funding</u> agency may request certain conditions on spending the money. They rarely fund recurrent cost
Philanthropy	<ul style="list-style-type: none"> • Individual gifts /donations 	<ul style="list-style-type: none"> -Large amounts may be donated quickly for specific cause. 	<ul style="list-style-type: none"> -Not very sustainable, usually just 'one off'
Accessing Government Resources	<ul style="list-style-type: none"> • Subventions 	<ul style="list-style-type: none"> -Usually provided over a long period (seven years). Recognition by Government that you are providing needed service 	<ul style="list-style-type: none"> -Difficult to access -May not be paid on time -May be for rather small amounts & costs to administer may be high

TYPE OF FUND	EXAMPLES	ADVANTAGE	DISADVANTAGE
Accessing resources from Businesses	<ul style="list-style-type: none"> Private Sector 	Grants or 'in kind 'donations	-Depends on the financial position of business- may vary from year to year -May not offer exactly the materials you need -Expects publicity



FINANCIAL PLANNING FOR A FUNDRAISING EVENT

The most important aspect of Fundraising is that it is being organised to make a profit. You must make sure that what you spend is less than what you make. Therefore, the first step is to **BUDGET**.

BUDGET

A **Budget** is the amount of money needed or available for a specific item, an estimate or plan of expenditure about income.

If we don't know how much money we will need to spend, then we do not know how much money we need to raise. Proper budgeting may lead you to re-evaluate the fundraising event you have selected. Below is an example of a Fundraising budget.

ANNUAL FISH FRY BUDGET

ITEM	DETAILS	ACTUAL COST		TOTAL COST	
		Cash	Contribution		
EXPENSES					
Fish	100 lbs of fish @ \$250 per pound	\$ 20,000.00	\$ 5,000.00	\$ 25,000.00	\$ 75,000.00
Oil	2 gallons of cooking oil @ \$3,000 per gallon	\$ -	\$ 6,000.00	\$ 6,000.00	
Seasoning	Assorted seasoning	\$ -	\$ 3,000.00	\$ 3,000.00	
Coal	5 bags of coal at \$1,200 per bag	\$ 3,600.00	\$ 2,400.00	\$ 6,000.00	
Stoves	Rental of 5 stoves at \$1000 per stove	\$ 2,000.00	\$ 3,000.00	\$ 5,000.00	
Labour	4 chefs at \$5000 per chef	\$ 10,000.00	\$ 10,000.00	\$ 20,000.00	
Tickets	Printing of 200 tickets at \$5000 per 100	\$ 7,000.00	\$ 3,000.00	\$ 10,000.00	
Totals		\$ 42,600.00	\$ 32,400.00	\$ 75,000.00	
REVENUE					
ITEM	DETAILS	QTY	UNIT COST	TOTAL COST	

Ticket Sales	Sale of 200 Tickets At \$1000 Per Ticket	\$ 200.00	\$ 1,000.00	\$ 200,000.00	
TOTAL INCOME					\$ 200,000.00
ACTUAL PROFIT					\$ 157,400.00

In this example, note the following:

- The expense section of the budget speaks to all the inputs needed for your fundraising event. It accounts for what the group will spend and what will be sponsored.
- The total of the “cash” column represents the money the group will have to find.
- The total of the “contribution” column represents the total sponsorship.
- The overall total represents the overall cost of the event.
- The revenue section of the budget speaks to all that will be done to raise money for the event.
- The “totals” row represents the total that will be acquired from raising funds for the event.
- The “income” is the difference between the total expense and the total revenue, and represents the profit based on money spent and sponsored items.
- The actual profit is the difference between the actual cash spent by the group and the total revenue, it represents the total cash in hand that the group should have at the end of the event

TIMING OF A FUNDRAISING EVENT

The following are times to hold or not hold Fundraising events:

- End of the month when people have money (salaries/wages paid)
- Not at Christmas
- Not at the start of a school year
- Not clashing with other events or activities [find out what other events are planned for your area before setting your date and time]

MONITORING A FUNDRAISING EVENT

A coordinator should be appointed for all fundraising events. This person should ensure that:

- Tickets get out on time
- Ticket sales are happening at a good pace
- Returns on ticket sales come in at a stated time, so that any adjustments can be made
- The budget is in place well in advance of the event
- Subcommittees are working according to plan

- Everything is in place before the actual event

PROJECTS VERSUS PROGRAMMES

Project

Is a temporary activity with a starting date, specific goals and conditions, defined responsibilities, a budget, a plan, a fixed end date and multiple parties involved. You know what you have to do, do it, once, and that's the end of it.

Programme

A programme is a set of related projects which collectively deliver an overall change for the business.

For example, an educational programme may involve several projects including:

- CSEC Classes Project
- GSAT Classes Project
- Remedial Classes Project
- Skill Training Project

The table below indicates some difference between a Project and a Programme

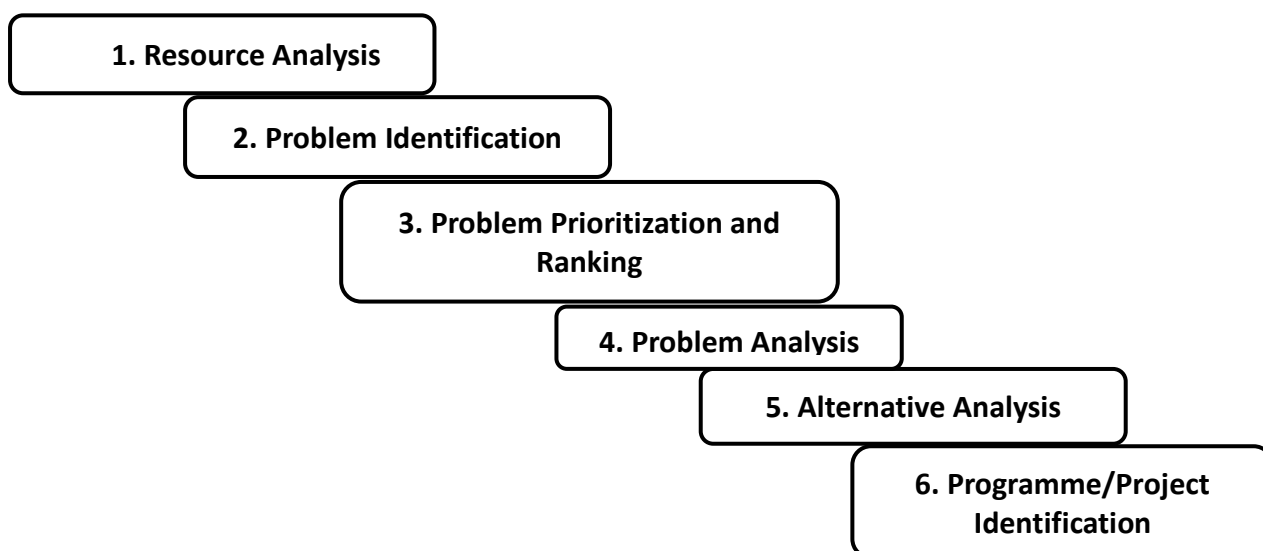
PROGRAMME	PROJECT
Addresses the entire business change	Delivers a specific change component
Focuses on strategic goals	Focuses on tactical delivery
May have imprecise definition	Has a precise objective
May have uncertain timing	Is defined with a specific timeline and budget
Evolves over a period to derive optimum benefit for the organization	Tries to avoid changes to the defined scope to ensure delivery
Requires much senior management attention, often including strategic and political debate across organizational boundaries	Requires management, communication primarily at an operational level concerning operational details
Produces an overall improvement in the business that may be multi-faceted and not fully defined at the outset of the programme	Produces specific pre-defined deliverables

PROJECT IDENTIFICATION

Before writing your proposal, it is critical that you identify the right project. This can be done through an Analytical Planning Process.

Below are the steps in this process:

ANALYTICAL PLANNING PROCESS



Steps 4 - 6 are most critical. Here is some guidance for these steps:

4. PROBLEM ANALYSIS

- Causes and effects of the problem
- Root cause(s)

5. ALTERNATIVE ANALYSIS

- Explore different alternatives of the root cause(s), to identify the most viable

6. PROGRAMME/PROJECT IDENTIFICATION

- Develop the programme around most viable alternative
- Develop projects to support the programme

The diagram below demonstrates the relationship between the steps.

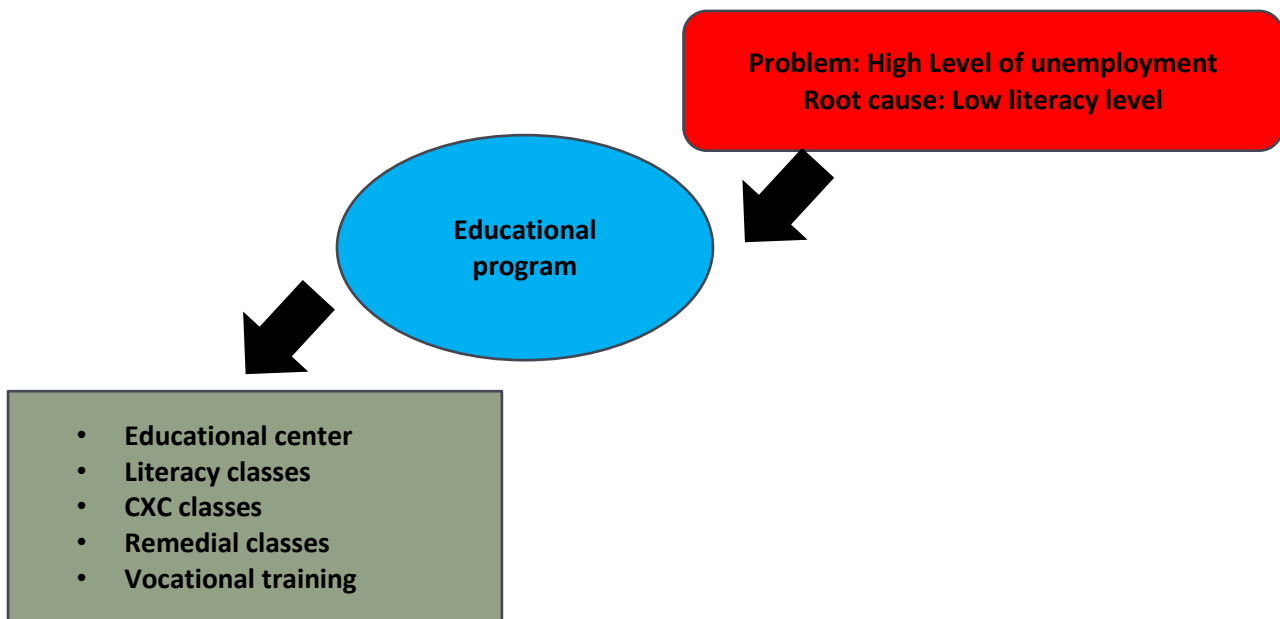


Figure 5: Programme and Project Identification

The Problem Analysis identifies the root cause of the problem. The Alternative Analysis helps to identify solutions to the root cause. These solutions are usually programmes to address the issue. In detailing the programmes, projects are identified.

Once we have identified the project we can proceed to writing the proposal.

PROJECT PROPOSAL WRITING

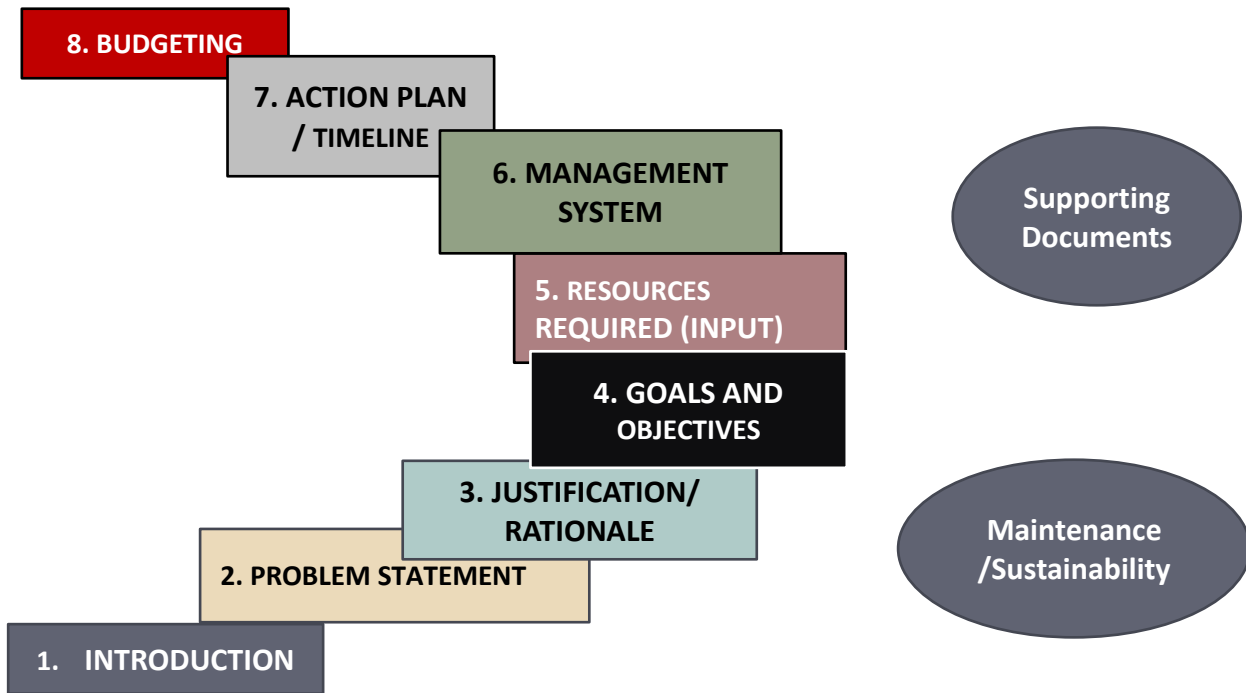
WHAT IS?

The art of writing a convincing story, to solicit support for development initiatives

- The story must be written so that it convinces the funder that it will have a great impact on the life of those concerned, through positive changes.
- Writers will need to know the community well and use that knowledge to plan how the story will unfold.
- The story must excite the funders.
- Project writing is not a task for an individual, but for a group.

STEPS IN PROJECT PROPOSAL WRITING

There are eight (8) steps involved in writing a generic project proposal. They are as listed in the diagram below:



INTRODUCTION

- The general events related to your project, local and international
- Narrow in on the community, school, etc., and ensure that the link between the general and the specific is made clear
- Speak to the general environment
 - Give statistics
 - Make references and quote sources

PROBLEM STATEMENT

Definition of community problem

A community problem is defined by six (6) characteristics:

- **Something which:**
 - Occurs frequently
 - Last for a while
 - Affects many people
 - Is disturbing and possibly intense
 - Deprives people of their legal/moral rights
 - Is perceived to be a problem
- **Frequency**
- **Duration**
- **Scope or range**
- **Severity**
- **Legality**
- **Perception**

What is deemed as a problem should satisfy most of these criteria. Problems may vary regarding place and group; however, perception is critical as whatever is perceived to be a problem is a problem. Hence of the six (6) criteria, perception must be a characteristic before an issue can be defined as a problem.

How to write a Problem Statement?

- Zoom in on the problem
 - Describe the problem using the six (6) criteria
 - Speak to the causes and effects of the problem. Predict what may happen if the problem is not addressed
 - Again statistics (sources) and references make your statement more valuable

Example of a Problem Statement

Residents identified improper garbage disposal as a problem which needs urgent attention. The problem has persisted since 2004 when Hurricane Ivan destroyed the existing receptacle. The litter of the garbage caused by the absence of a proper disposal site, negatively affected the residents' attitude towards disposal, and infrequent collection, has affected the majority of the population as the health centre has recorded a 40% increase in skin and respiratory diseases, since 2004. Needless to say, that if this problem is not contained, the implication for the health of the community is severe. Hence, the reconstruction of several disposal receptacles and partnership with the relevant stakeholders is essential to the well-being of the community.

JUSTIFICATION/RATIONALE

The justification seeks to show that the project is right or reasonable. It seeks to convince the funder that the project is the best solution for the problem being addressed. The following are some points for consideration when writing your justification/rationale statement:

- Ask the question:
 - Why is it important to do this project?
- Answer the question:
 - Link the project to a programme
 - The project is the best solution to the problem
 - Immediate impact on the community
 - Long term impact on the community

GOAL AND OBJECTIVES

Goal

The goal is a brief statement that describes in measurable terms the change that will occur to the problem or opportunity being addressed.

- The key question: “What will the community look like after this project?”

Example of a goal statement

“Improved solid waste management and waste management practices in the community of Gordon Town, resulting in a cleaner, healthier and environmentally sustainable community”

Objectives

Objectives are the measurable targets of specific benefits to be received as a result of the project.

- Objectives must be linked to the goal.
- To be presented as incremental steps towards the goal
- Should be short and precise... ..no more than three lines
- Must be **SMART**

CONSIDERATIONS

Goals/Objectives must be measurable. I.e. to say, objectives must be written in a SMART way

Specific- How much of what is to be achieved

Measurable-Records can provide information about objectives

Achievable-They can be accomplished

Relevant-They fit in with the vision and mission of the organization; Goal and problem

Timed - They must be achieved in a specific time

Examples of Project Objectives

To form a Disposal Committee made up of at least 8 residents and all representatives from all relevant stakeholders’ groups (NEPA, NSWMA, SDC, Parish Council, Police), for monitoring garbage disposal and collection, as well as maintenance disposal sites, by the end of March 2013.

To construct three (3) 9’ x 9’ x 5’ 8” and one (1) 7’ x 7’ x 5’ 8” garbage receptacles, made of concrete with metal gates, placed at four (4) strategic locations (Savage Pen, Wiltshire, Industry Village {2}) for adequate garbage disposal, by the end of month 4 after the disbarment of funds.

RESOURCES (INPUT)

Your outputs may be defined as what the project will **we** need to make our goal and objective reality

How to identify resources

- Consider the **5**Ms. of resources
 - Manpower, Material, Method, Machinery, and Money
 - Consider the objectives and what you will need regarding the 5Ms

MANAGEMENT SYSTEMS

Funders require their investments to be used most effectively, one thing that convinces the funder is management mechanisms in place. The biggest indicator of management is a governance structure. Ideally the structure should be a part of the larger structure and should include representatives of the beneficiaries. These structures are usually called the Project Management Committee (PMC) or Project Monitoring and Evaluation Committee (PMEC).

Ensure that your project proposal includes the following in this section:

- Proposed makeup of the committee
- How the committee will operate
- When the committee will meet
- How the committee will manage the project
- Track record of managing previous projects

ACTION PLAN/TIMELINE

Action Plan

The Action Plan details how the project will roll out. The Action Plan is a breakout of the details of how an objective will be met. The key to completing an Action Plan is to identify action steps for achieving the objectives and determining the order in which these steps will be taken. Once the action steps and their order have been determined, the following should be identified for each step:

- Action Steps (in the order in which they will be done)
- Who will be responsible?
- By when the action will be completed
- Support needed
- Resource needed
- What can go wrong?
- If so, then what
- Indicators of success

The template of the Plan is secondary, the important thing is to cover all the areas listed above.

Below is an example of an Action Plan template

EXAMPLE OF ACTION PLAN TEMPLATE

Objectives (Phases)	Priority Actions	When?	Who Responsible?	Support Needed From The Who?	What Can Go Wrong?	If So, Then What?	Indicators of Success
To facilitate the establishment of a Sanitation Management Committee	Stakeholder Analysis	1 st week of June	CDC Executive	Stationery (CDC) Technical Support (SDC)	Act of God	Reschedule meeting for two days later	Engagement plan
	Prepare letters for stakeholders	2 nd week of June	CDC Secretary	Computer and Printer (Ms Brown) Office Stationery (Secretary)	Computer and Printer not available	Go to an internet cafe	Copies of completed letters
	Deliver letters to stakeholders	3 rd week of June	CDC PRO	Transportation (Mr. Brown)	Vehicle not available	Provide petty cash	Signatures in delivery books
	Follow up phone calls	4 th week of June	CDC President	Phone Credit (Treasurer)	Stakeholders not available	Call back 24 hrs later	Recorded stakeholders' response
	Identify a date and venue for the first meeting	1 st week of July	CDC Secretary	Site visits (PRO)	No available venue	Alternate venue (SDC Conference Room)	Venue contract
	Prepare agenda and presentations	2 nd week of July	CDC President	Planning session (Executive Body, SDC CDO)	Act of God	Reschedule meeting for 24hrs later	Draft Agenda

Time Line

The timeline helps to determine the length of the project. It is done per objective and gives a graphic representation of the timing of the project.

- Look for the required activities under each objective
- Ensure that the activities are in a logical sequence

The timeline is informed by the “when” column of the Action Plan. Below is an example of a TimeLine matrix.

	MONTH 1	MONTH 2	MONTH 3	MONTH 4
FORMATION OF COMMITTEE				
COMMUNITY SENSITIZATION				
EDUCATIONAL COMPONENT				
CONSTRUCTION OF RECPECTACLES				

Based on this graphic representation the funder will be able to garner several levels of information, such as:

- The project will last for four (4) months
- Month two (2) will be the busiest month of the project.
- Month four (4) will be the least busy month of the project
- Most objectives will be completed within two months. However, the educational component will last throughout the project.

BUDGET

The budget is one of the main areas that funders consider in approving projects.

- Make your budget as detailed as possible
- Ensure that all activities and items are accounted for

Tips

- Allow your Action Plan to inform your budget
- Attach a cost to each activity. The sum of the activities will tell the cost of the objective, and the sum of the cost of the objective will help to determine the cost of the project
- Ensure that you highlight community contribution and put a cost to it
- Differentiate between what the project costs, and what you are requesting of the funder (i.e. Cost of project-community contribution)
- Seek technical assistance

Below is an example of a project budget

No	Items	Requested Grant	Applicant's Contribution	Applicant's Contribution
1	Stationery, venue rental		\$ 40,000.00	
2	Support Committee meetings		\$ 25,000.00	\$8,000.00
3	Flyers- design		\$ 5,000.00 (Kind)	
4	Posters- design		\$ 7,000.00 (Kind)	
5	Mobilization-		\$ 32,000.00 (Kind)	
6	Refreshment for workday	\$ 10,000.00	\$ 10,000.00 (Kind)	
Sub Total		\$ 10,000.00	\$119,000.00	\$ 8,000.00
6	Educational material and Rental of Equipment	\$ 15,000.00	\$ 9,000.00	\$ 8,000.00
	Production of Flyers-	\$ 4,000.00		
	Production of Posters	\$ 3,000.00		
7	Raw Material for construction	\$ 175,000.00	\$ 10,000.00	
8	Rental of Welding Plant	\$10,000.00	\$ 10,000.00 (Kind)	
9	Tradesmen	\$ 66,000.00	\$ 66,000.00 (Kind)	
10	Labourers	\$ 30,000.00	\$ 30,000.00 (Kind)	
Sub Total (REVISIT ALL FIGURES)		\$ 303,000.00	\$ 125,000.00	\$ 8,000.00
Grand Total		\$ 313,000.00	\$244,000.00	\$16, 000.00
PROJECT TOTAL				\$ 589,000.00

MAINTENANCE/SUSTAINABILITY

Some funders will be interested in the maintenance and sustainability of the project. The following are some guiding questions that can be used to inform this part of the proposal.

State how the impact of the project will be continued after the project funding has finished

- What will happen to the programme after the project activities are completed?
- How will the programme be managed when the funded activities of the project are completed?
- How will the project be funded in the future?
- How will beneficiaries or others carry on the work?

SUPPORTING DOCUMENTS

Some funders may require proof of the ability of the organization to manage the project. Usually for this requirement the funder may request some supporting documents. Supporting documents are papers that provide proof of the organization's capacity and is usually added to the proposal as addendums. Below is a list of documents funders usually request as supporting documents.

- Meeting minutes
- Minutes of AGM
- Financial statements
- Legal registration document
- Endorsement letters
- Lease arrangements
- Proforma invoices/ cost estimates
- Bank account statement
- Cash flow projection

PROPOSAL WRITING TIPS

- Acquire knowledge of the various organizations that provide donor funding
- Re-examine your project by asking the necessary questions
- Start working on your budget from early
- Ensure that your proposal is well written
- Make sure your proposal is realistic and feasible
- Develop the organizational capacity to implement a project

WHAT DONORS LOOK FOR

- How the proposal is written – *does it reflect the reality on the ground?*
- A concise *not long-winded* proposal
- A proper budget *that includes realistic figures*
- Consistency *between the budget and rest of proposal*
- Well-developed problem statement
- Benefits *to be derived from the project must be clear*

STRENGTH AND WEAKNESSES

Strong proposals are:

- Comprehensive but to-the-point
- Well thought through
- Have a justifiable budget



Common weaknesses:

- The objectives are not clear
- Poor writing style
- Does not explain how the project will be executed?
- The budget is not related to the objectives

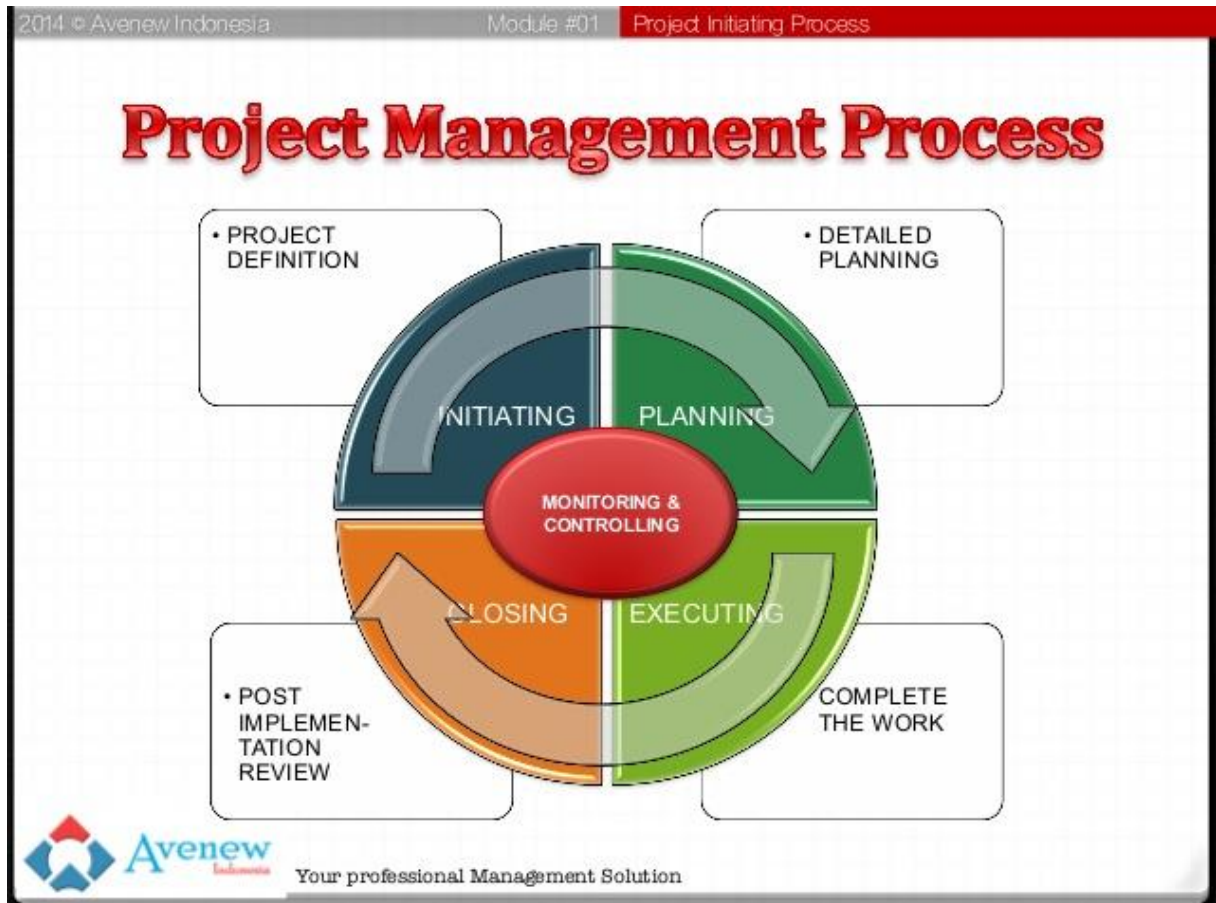


SUCCESSFUL PROJECT PROPOSALS

- **Sound project planning**
 - The project must be properly thought out before the request for funding is made
 - **Development of a strategy that** outlines all the essential aspects of the proposed project, including the capability of your organization to manage the project
- **Answer key questions**
 - About the proposed project



INTRODUCTION TO PROJECT MANAGEMENT



PROJECT MANGEMENT FOR CSOS

MODULE 5

2017

Rejuvenating Communities: Building Resilience to Support Citizens Safety and Social Cohesion in West Kingston

PROJECT MANAGEMENT

WHAT IS A PROJECT?

A temporary endeavour undertaken to create a unique product, service or result

Characteristics

- Temporary
- Unique product, service or result
- Progressively elaborated

Examples of Projects

- Building a community centre
- Hosting a summer camp
- Organising a parenting workshop
- Rehabilitation of a road in the community
- Fundraising concert

WHAT IS PROJECT MANAGEMENT?

Project Management is defined as: “The application of knowledge, skills, tools and techniques to project activities to meet the project requirements...” *PMBOK Guide 5th Edition*

For effective Project Management the following must be accomplished:

- Identifying requirements
- Addressing stakeholders’ needs, concerns and expectations
- Balancing competing project constraints

Project Management Objectives

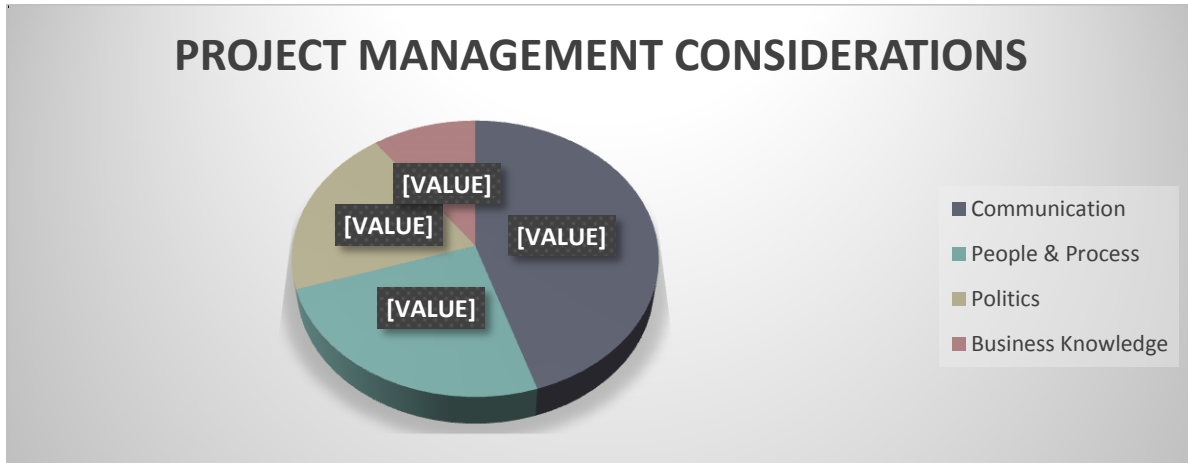
- Projects must be within scope
- Projects must be delivered on time
- Projects must be within the cost
- Projects must meet customer quality requirements

Source: USAID, 2010



Project Management Considerations

There are several factors to be considered when managing a project. They include: communication, people and processes, politics and business knowledge. It is important to note that these factors are weighted, i.e. some are given more consideration than others. The pie chart below indicates how these indicators are weighted.



When managing a project, communication should be given the most consideration (45%), followed by people and processes (25%), politics (20%) and finally business knowledge (10%).

THE PROJECT MANAGER

A Management Committee usually manages a project. Primarily, this committee monitors the outputs of the project. For a project to achieve these outputs there has to be management of the day-to-day running of the project. This level of monitoring is usually done through a Project Manager.

“The project manager is the person assigned by the performing organization to lead the team that is responsible for achieving the project objectives” PMBOK® Guide, Fifth Edition, Glossary

The project manager is a critical member of the Project Management team. This individual often makes the difference between project success and failure.

PROJECT MANAGER MAIN RESPONSIBILITIES

- The project manager must define the project, reduce it to a set of manageable tasks, obtain appropriate resources and build a team to perform the work.
- The project manager must inform all stakeholders of progress on a regular basis (reports to the Project Management Committee).
- The project manager must assess and monitor risks to the project and mitigate them.
- No project ever goes *exactly* as planned, so project managers must learn to adapt to and manage change.



TRAITS OF A GOOD PROJECT MANAGER

To effectively execute his/her main responsibilities, a good Project Manager should possess the following characteristics:

- Ability to coordinate the efforts of the technical staff
- Ability to direct team members and keep them motivated and on track
- Ability to smoothly navigate through the tricky politics within and between the participating organizations and stakeholders
- Ability to lead from behind i.e. the ability to lead from the background, not to be intrusive, but to observe and make timely interventions

The skills of a good Project Manager should include:

Organizational skills

- Keeping projects on schedule and within budget
- The ability to assign resources, prioritize tasks and keep tabs on the budget will ensure quality and impact the project's success.

Effective Communication

The project manager is the main communication link between the stakeholders and the project management team. His or her ability to communicate effectively with members of both groups is essential. He or she must be able to communicate project objectives, challenges or problems, scope changes, and regular project status reports.

Problem-solving skills

Unexpected problems or challenges exist in every project and if not controlled can drive everyone crazy. The project manager must be able to handle these situations effectively and mitigate risk so they don't get out of control.

Delegation of authority

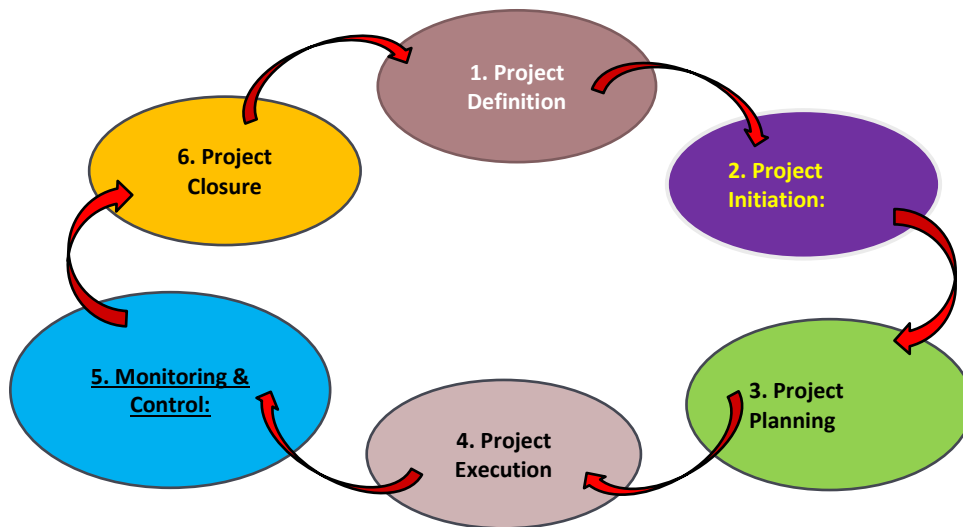
Through delegation, other members of the project management team are allowed to contribute to the project's success. Through delegating powers, these members get a feeling of importance. They get motivated to work and this motivation provides appropriate results which enhances the overall project.

Other skills required includes:

- Leadership
- People management (customers, suppliers, other stakeholders and project team)
- Negotiation
- Conflict management
- Planning
- Contract management
- Estimating
- Creative thinking
- Time management.

PROJECT LIFE CYCLE

The life cycle of any project goes through six (6) processes, they are as follows:



1. Project Definition:

- Defining the goals, objectives and critical success factors for the project

2. Project Initiation:

- Everything that is needed to set-up the project before work can start

3. Project Planning:

- Detailed plans of how the work will be carried out including time, cost and resource estimates

4. Project Execution:

- Doing the work to deliver the product, service or desired outcome

5. Project Monitoring & Control:

- Ensuring that a project stays on track and taking corrective action to ensure it does

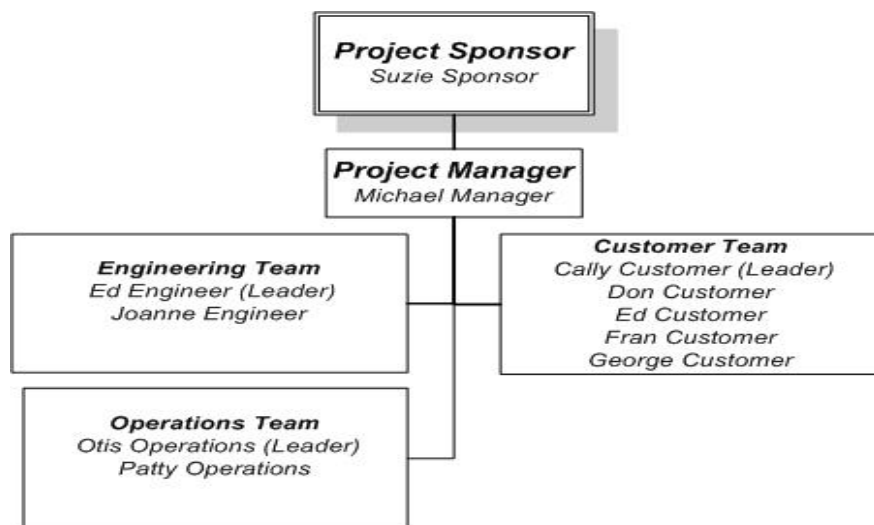
6. Project Closure:

- Formal acceptance of the deliverables and the disbanding of all the elements that were required to run the project.

PROJECT ORGANIZATIONAL STRUCTURE

The Organizational Project Structure shows the arrangement of how job tasks are formally divided, grouped and coordinated. It outlines basic relationships to implement the project, defining the formal lines of authority, responsibility, reporting and power.

The structure is usually represented graphically on an organizational chart. Here is an example of a graphic project organizational structure.



PROJECT IMPLEMENTATION

The carrying out, execution, or practice of a plan, a method, or any design for doing something. As such, implementation speaks to the sequence of activities that must be carried out for the project to achieve its deliverables. (Source: World Bank 2010)

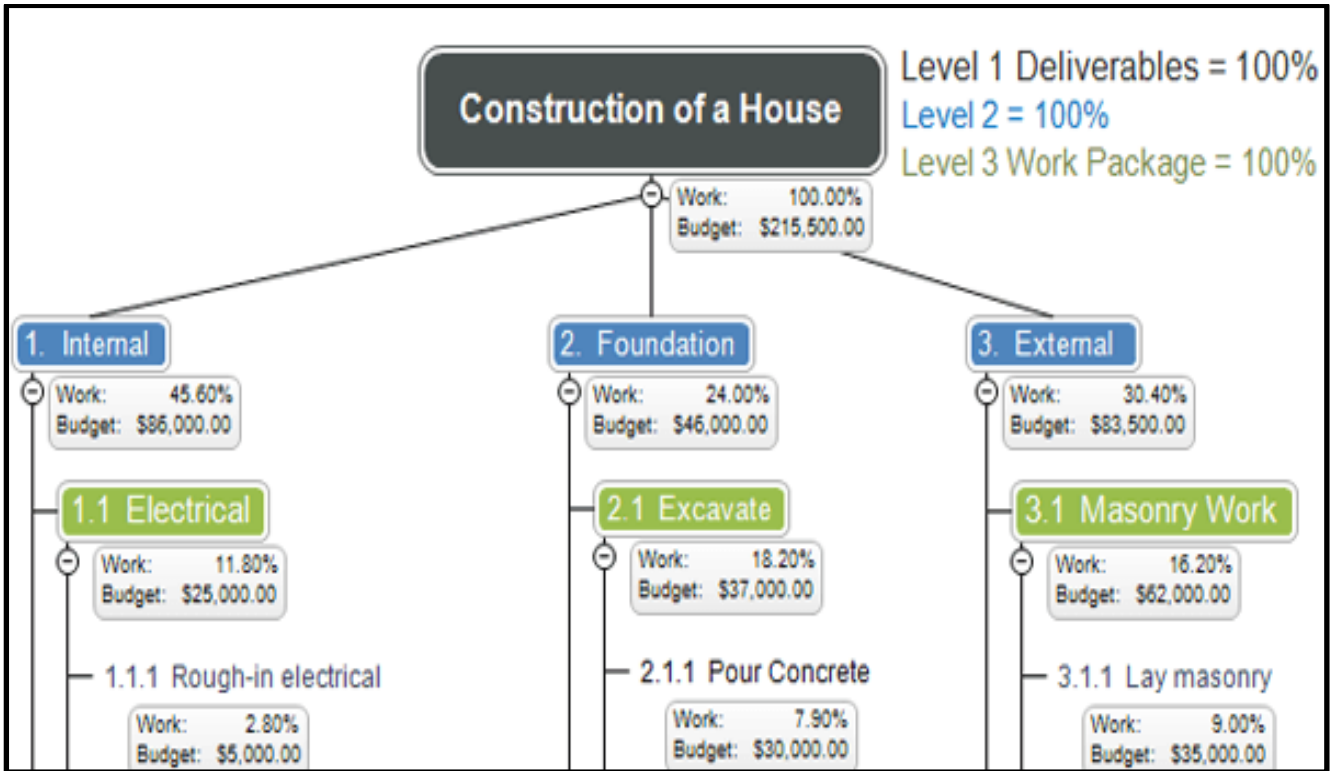
There are two (2) main tools used in Project Management:

- Work Break Down Structure
- Project Activity Plan

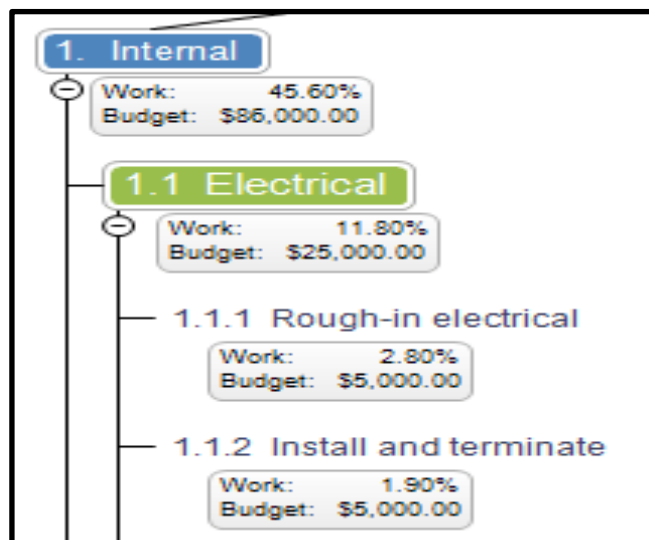
WORK BREAKDOWN STRUCTURE (WBS)

A deliverable oriented breakdown of a project into smaller manageable components. It defines and groups a project's work element in a way that helps organize and define the total work scope of the project.

Below is an example of a WBS as defined by *The Project Management Body of Knowledge (PMBOK)*:



An easy way to think about WBS is as a map of the specific project. A WBS starts with the project as the top-level deliverable and is further broken down into sub-deliverables using a step by step outline as per the example below.



Note that the WBS is usually informed of the Action Plan of the project proposal documents.

PROJECT ACTIVITY PLAN

The Activity Plan is a detailed description of the work to be carried out on the project based on the areas covered under the WBS. Using the Activity Plan, the project manager and team can track the progress of the project and measure success in light of scope, time and cost considerations. The project activity plan is very useful for the monitoring and evaluation of the project during the project implementation phase.

Below is an example of an Activity Plan:

ACTIVITY	TIME OF COMPLETION	BUDGET ALLOCATION	PERSON RESPONSIBLE	COMMENTS
Sensitization of Community re: project scope and roll out:	Nov 30, 2017	\$100,000.00	Ricardo Smith - Public Relations Officer – CDC	Mr. Smith will be working along with the CDC to execute the sensitisation phase of the project. A progress report is to be presented to the project management committee until the process is completed.
<i>Develop and print flyer.</i>	<i>Nov 11</i>			
<i>Develop recording for town crier.</i>	<i>Nov. 11</i>			
<i>Rental of town crier</i>	<i>Nov. 13</i>			
<i>Hosting of meetings at the community centre (meals etc.)</i>	<i>Nov, 26, 28 and 30</i>			
Purchase of Construction material for renovation of community centre:	January 17	\$750,000.00	Jermaine Waite, Project Manager/Dana Wilks – Accounts Officer – CDC	The project management committee will give oversight to this activity. All invoices and payments have to be approved by the committee and will be done in cheque.
<i>Procurement of material</i>	<i>January 10</i>			
<i>Purchase of material</i>	<i>January 17</i>			
Commencement and Completion of renovation work (payment of workers)	Start Date February 3, 2017 – End Date April 28, 2017	\$1,500,000.00	Project Manager – Jermaine Waite	
Assessment of work completed	May 14, 2017	\$100,000.00	Project Sponsor – JSIF, Project Management Committee, CDC	
Project Monitoring and Evaluation	Ongoing	\$200,000.00	Project Management Committee	
Project Close review	May 28, 2017			

Note that the bright colours and **emboldened**, represent the main activity while those in *italics* and lighter colours represents smaller activities (breakdown of main activities). Note that not all main activities need to be broken down into smaller activities.

RISK CONSIDERATIONS

In managing your project several things can go wrong. As a Project Manager you should be aware of the risks involved and try as far as possible to mitigate against them. Some things that can go wrong and mitigation strategies that can be employed are as follows:

Risks/Things that can go wrong	Mitigation Strategies
Poor communication	Design an effective communication strategy.
Disagreement	Ensure that the facts are well known by all concerned and employ conflict management skills
Misunderstandings	Ensure periodic briefing of what is to be done, when and by whom.
Bad weather	In planning, ensure that sufficient time is allotted for delays
Workers' dispute	Look for signs to be proactive. Ensure that the agreement with workers are at the forefront and agreed on before moving forward.
Personality conflicts	Create a professional atmosphere among persons.
Poor management	Ensure systems and requisite mechanisms are in place and used as guidelines for managing the project.
Poorly defined goals and objectives.	Ensure that in writing the project proposal, goals and objectives are clear. If not, seek clarity before implementation.

GARNERING COMMUNITY SUPPORT FOR A SUCCESSFUL PROJECT

You are undertaking a project or initiative that you feel will benefit the community.

- How do you think the community will react to the project?
- What can you do to bring the community on board?

Communication & Community engagement are key!

THE BEGINNING

Knowing your community is critical to building support and this forms the perfect place to start.

One of the first steps is to gather information on the community. Here are some critical questions that can be used to guide this process:

- What is the history of the community?
- Were there problems initiating new projects in the past?
- Who are the people with power and influence?
- What is the perspective of community stakeholders?

Gathering information of this nature helps one to understand the local dynamics of the community better. Therefore, one will be better able to create an effective community engagement strategy.

Another step is to identify the individuals and organizations in the community who will be affected by the project.

- How might they be affected?
- What information do these people want and need?
- Could the project be changed to meet their needs better?

The best way to answer these questions is to build rapport with individuals and groups and have discussions around these issues. In other words, this is an opportunity to engage the community around the project and get critical feedback that can inform how you proceed with the project.

Some engagement strategies can be employed, these include but are not limited to this list below:

- Community Meetings
- Stakeholder Meetings
- Corner Meetings
- Community mixes (parties)
- Transect walks
- Media
- Park and walk activities.
- Distribution of Project Fact Sheets with tear off response
- Community Workshops
- Town Cry

Remember that communication is 40% of the factors to be considered in project management. This should be done internally (*within the operations of the project*) and externally (*stakeholders including the community*). Engaging the community around the project not only helps with the management of the project but guarantees sustainability through the community's ownership of the community.

Abbreviations/Acronyms

CDC Community Development Committee Level 2 community-based organization

KSA Kingston and St Andrew Municipality made up of two parishes in Jamaica

SDC Social Development Commission The government agency responsible for facilitating sustainable development in communities in Jamaica

SMART Specific, Measurable, Attainable, Relevant and Timely A strategy for writing objectives

UNDP United Nations Development Program International Funding Agency

WBS Work Breakdown Structure A hierarchical breakdown of work to be done on a project

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