Project Implementation: Criteria for Project Selection, Ongoing Management and Evaluation

Please note this is an example.

Selection of Projects

A committee/subcommittee is often responsible for initiating projects that will achieve the goals of the Partnership in the area for which it is responsible. The staff responsible for this area will publicize the project theme and request project proposals. In order to increase the chances of success for each project, it is important to define the following ahead of time:

- What are the expected outputs from the project?
- What are the measures of success for the project in the eyes of the Partnership?
- How does the project contribute to the Partnership itself?

Defining things early is important since it assists in the selection of the project implementer, it makes clear the expectations of the Partnership to the implementers and it aids in the monitoring of the project and drawing conclusions on its completion, which will be useful in the implementation of the next project. Although defining measures of success ahead of time is not easy (particularly in the case of education or welfare projects), it enables a fruitful dialog among the members of the Partnership on the question of what the Partnership is trying to accomplish.

The Partnership must also develop a list of criteria for a successful project. The list will reflect the values, the vision and the mission of the Partnership. For example, it is recommended that the list will include the ability to implement the project independently following a defined period of time (see the section on Exit Strategy).

Following is an example list, which can serve as a basis for the Partnership's list of criteria.

CRITERIA		
Fits the Vision/Mission of the Partnership	Financial self-support viability– exit strategy	Cost-Effectiveness, maximum "bang for buck"
Clear, measurable, focused goals	Regional Influence	Solves problems, not symptoms
Number of individuals touched	Empowerment–people helping themselves	Probability of success
Types of populations affected (age, ethnic group, weak populations)	Wanted and/or agreed upon by **all** partners	Based on a professional approach
Uniqueness, marketability	Durability and length of long term effect	

P2G Strategy, Development and Tools

Ongoing Management of a Project

The main tools for ongoing and systematic management of a project include:

Defined Goals and Measurable Objectives: A project starts with the precise definition of its goal. In addition, its objectives must be defined in terms of output and desired achievements.

Creation of a Structure & Agreement of the Partners: A consensus surrounding the project's goals and a shared understanding among the members of the professional committee that is managing/implementing the project and the participants are essential to the ongoing management of the project. At the same time, over the lifetime of the project, various doubts may arise as to the interpretation of the goals. Our recommendation is not to reject these doubts by saying: "We have already decided that…" but rather to ask: "What information has been gained since the original consensus to do the project which would justify a reappraisal of the project's goals?" The ongoing interpretation of goals is the main task of project management.

It is important to remember that the Partnership is both a goal and the means of achieving it. The Partnership is a means of advancing joint projects that will interest the Partnership communities but it also serves as a goal in itself. The overall goal of the entity known as a "Partnership" is to develop and maintain a global Jewish partnership and therefore each project also services that goal. The desire for consensus on the projects' goals emphasizes the value of the Partnership as a goal in and of itself.

Timetable and Milestones: The topic of scheduling is dealt with in the section on work plans.

Monitoring and Periodic Reporting: Monitoring is the ongoing process of gathering information and data on the implementation of the program. The monitoring is accomplished through the program implementers under the Partnership's supervision and is a part of the program's execution. Based on the consensus surrounding the project's goal, a decision is made on the points that the manager of the professional staff will report to his staff regarding the progress of the project. It is important that the reporting include the project's activities and accomplishments. This emphasis is essential since there is a tendency to submit reports only when problems arise or with respect to controversial issues. Successful management of the internal Partnership dialog requires reporting that includes activity, accomplishments and doubts.

Managing Staff Schedules: The Director must plan staff meetings based on the project's milestones as well as the reporting needs of the project and not necessarily at fixed intervals. It is important that the timetable schedules meetings for a long period into the future—a year if possible—and that the schedules of all the participants be coordinated with it. The process of coordinating schedules takes time but is essential.

- Prior to each meeting, the Director will send the agenda to the participants, who he should consult with before sending it. There should be no deviation from the defined agenda unless the project manager is convinced that it is beneficial to achieving an important goal and is urgent.
- During the meeting itself, the time should be divided as follows:
  1. Opening – reading the agenda and taking attendance.
  2. Review of what has been done since the last meeting.
  3. Discussion/Clarification – Understanding the items on the agenda.
  4. Decision making if needed (see the section on consensus below).
  5. Allocation of Tasks – Each decision specifies the name of the responsible individual and a timetable for implementation.
  6. Conclusion.

- Following each meeting, the minutes, which will contain the main points discussed at the meeting, will be distributed. It is important that minutes not be longer than one page. The list of those to receive reports should be determined at the start of the project in order to have a distribution list for minutes.

The Dilemma of Deciding on the Number of Projects

One of the most difficult dilemmas facing the Partnership is whether to invest a small amount of resources to a large number of projects or a large amount of resources to a small number of projects or, perhaps, in a single flagship project?

The background to this dilemma involves the different, and sometimes conflicting, needs of the partners. One of the needs of the partners is to respond to the needs of the community abroad or of the local community. These desires, which sometimes come with a "contribution tag," lead to a multiplicity of projects in order to satisfy the various donors. Sometimes, a donor will have a pet project and will be interested for the Partnership to be the channel through which the project is implemented.

Another need is to create impact among the beneficiaries of the project. A common assumption is that in order to create significant impact there is a need for significant resources, and when resources are allocated among a large number of projects the chance is smaller for each project to be meaningful.

A standard solution to this dilemma does not exist. However, the dilemma can be managed effectively. The emphasis must be on the ability of the Partnership to be **meaningful** and to bring about a **long-term change**. Therefore, it is worthwhile for the majority of the Partnership's resources (money, attention, time, etc.) be directed towards one main project (the flagship project). The rest of the resources will be allocated to small projects, to the implementation of pilot projects which have a chance of becoming the next flagship project and, if necessary, to pet projects, although this will be on the condition that the project will raise the rest of the required resources on its own.

In the long run, the use of Partnership resources for a pet project of people with influence on the Partnership will **hurt** the Partnership since it creates pressure for additional projects (which will not have resources) and a feeling of unfairness among the Partnership volunteers.

Defining Outputs– Desired Impact and Results

Each project needs inputs: budget, time, knowledge, manpower, etc. There is a natural tendency to concentrate on inputs and so the attention of the implementer is focused on the activity itself and not what the activity is meant to achieve.

Example

Let's analyze a typical welfare project involving a summer camp for children at risk. When the project is defined in such a way, in terms of inputs (a summer camp), two problems can be expected: first, that all the content to be chosen for the camp is appropriate (there is no criterion for deciding whether soccer is more appropriate than a hike to learn about Israel) and second, by not defining the desired outputs and achievement, other methods of operating that would better achieve the goal of the project are not considered.

If 'goals' and 'outputs' are defined (rather than the input - a summer camp), it will be easier to evaluate the appropriateness of the various activities planned. This will also ensure the possibility of examining alternatives that will achieve the project's goal.

Defining outputs: Instead of a summer camp it is possible to define a recreational activity that advances and occupies the children during the summer months. With such a detailed definition, it is possible to evaluate having English lessons given by a clown instead of a pottery workshop (on the assumption that both of them are activities that are recreational and occupy the children, but that English advances the children more than pottery does). In addition, instead of a summer camp in the conventional sense of the work (a counselor with a number of children) it will be possible to organize a different activity, such as hosting a number of children in home of one of the parents in rotation or a sports competition between neighborhoods.

If is important that, in addition to the outputs expected from each project, the desired impact should also be defined. A project's impact can be promoting the concept of the partner community among the project participants, strengthening of the ties to Judaism, improvement of self-image, etc. The definition of the impact ahead of time can also help in guiding the project.

Finally, in order to make it easier to evaluate the project, it is desirable that the goals be measurable, objective and visible. In the example of a summer camp for needy children, it is worthwhile defining enrichment activity (in preparation for the coming school year) for 30 children, who in the absence of this activity will spend the summer hanging out on the streets.

Project Evaluation

(The Jewish Agency's Unit for Strategic Planning and Evaluation can be consulted)

Partnership2Gether, like other entities (government ministries, local authorities and Third Sector organizations) implements social and educational programs. These programs have various goals, such as reinforcement of weak segments of the population; improving scholastic achievements; strengthening Jewish identity; strengthening of the bonds with Jewish communities abroad; leadership development, etc.

The initiators of programs, the donors and the entities involved in their implementation attribute growing importance to evaluation of programs. In recent years, a policy has been emerging among donors whereby evaluation is a necessary condition for financing a program. The results of a program evaluation serve as a tool for decision making regarding the continuation of support for a program.

Evaluation means "structured and systematic gathering and analysis of information on planning, implementation, inputs or outputs of programs."

Advantages of Evaluation

- Assistance in policy making and in making administrative decisions.
- Preserving the quality of planning and implementation; maintaining effectiveness.
- Advancement of organizational learning among interested parties and partners in the activity of the Partnership2Gether Unit.
- Recruiting support and marketing of the Unit's activities by means of data, findings and recommendations.

Stages of an Evaluation

1. **Building an Evaluation Program**
   - Identifying the source of the initiative and the need.
   - Identifying the consumers of the evaluation.
   - Identifying the issues/objects to be evaluated: Did you achieve the goals and objectives? The effect of the activity (impact)? Satisfaction of target population? Evaluation of the implementer? Evaluation of inputs/outputs? Evaluation of cost/benefit? Evaluation of planning vs. implementation?
   - Identifying the type and function of evaluation: Formative? Summative?
   - Identifying and locating the evaluator: External evaluator? A member of the staff? A volunteer?
   - Allocation of resources.
   - Setting a timetable for evaluation.
   - Creation of an evaluation committee.

2. **Execution of the Evaluation:** Creation of tools (interviews, questionnaires, observations, focus groups, review of the literature, etc.); gathering, processing and analysis of data.

3. **Writing of an Evaluation Report:** findings, conclusions and recommendations.

4. **Presentation of a Report** to the evaluation consumers.

P2G Strategy, Development and Tools

Models for Evaluation

- **External Evaluation**
  To be carried out by an external professional body (evaluators, research institute, academia, etc.); independent and objective; guided by the professional staff of the Jewish Agency; requires a significant budget and a period of time for the tender process, the signing of a contract and learning about the organization and the program.

- **Internal Organizational Evaluation**
  Carried out by the professional staff of The Jewish Agency's Unit for Strategic Planning and Evaluation; does not involve financial cost to the Partnership; there is no need for a process to introduce the Jewish Agency, the evaluation consumers or the program; uses resources of the headquarters; limited to an Internet evaluation (for example, through the "Nemala" web-based questionnaire system) or the building of non-Internet questionnaires without work in the field; viewed as less objective than an **external evaluation**.

- **Internal Evaluation by the Partnership (Director, Steering Committee or volunteers)**
  Does not involve financial cost; the evaluators know the program, the Region and the target population of the programs; increases the involvement and commitment of the evaluators to the Partnership, to the P2G Unit and to the Jewish Agency; contributes to the professionalism of the Partnership; uses time resources and requires management, transparency and cooperation; requires the appropriate training of evaluators (by the JAFI unit for Evaluation and Measurement or an external evaluator); carried out from the perspective of parties of interest (not objective); the evaluator is not a professional.

- **Internal Evaluation Combined with an External Consultant**
  In this model, the Partnership staff, the members of the Steering Committee, volunteers, students who receive scholarships, members of the leadership groups, etc. carry out the evaluation on a volunteer basis, under the professional direction of an external evaluator (paid) or with the assistance of a volunteer professional.

Exit Strategy

Already in the planning stage, one needs to present how the project will continue to be self-sustainable once the initial period of financing from the Partnership is over. The Partnership can continue supporting the project after the end of the first period but in this situation it must explain how the project will create the ability to "stand on its own feet" after the financing of the Partnership will end. An exit strategy can include the following possibilities:

- Participation of the project beneficiaries in financing.
- Requesting assistance from the government, the Third Sector and the local government.
- Transforming a social project into a business project, etc.

Work Plan and Oversight

As stated earlier, measurable objectives and a timetable accompanied by milestones are the main tools for the management of a Partnership project.

Every project starts with a definition of the goals and objectives that it needs to achieve by its completion. Between these two points in time, a timetable should be determined **from the project's end to its beginning**. Reverse planning from the end to the beginning requires setting measurable interim goals as milestones of the process. This type of planning makes it possible to see which processes can be implemented in parallel (thus saving time) and in contrast which steps are dependent on the successful completion of the previous stage. In addition, it is important in the planning stage to determine which points must be decided on before continuing with the process and whether the decision is within the authority of the subcommittee or whether the Steering Committee must get involved.

Example

If the goal of a project is to **increase the income possibilities for young couples in the community**:

1. Success will be measured by the number of couples whose level of income is increased by the completion of the project. We will assume that this goal will be achieved by the couples starting their own businesses.
2. Reverse planning will emphasize that with the start of the business, it should be possible to measure its revenues.
3. The previous stage will indicate that the business should be started.
4. The previous stage will indicate that the business should be established (building, renting, advertising, materials, knowledge, equipment, etc.).
5. The previous stage will indicate that legal and financial approvals are needed in order to open the business.
6. The previous stage will indicate that budget approval and fundraising are needed for the business.
7. In order to obtain funding, a business plan that includes a budget should be created.

And so on, until the day of the start of the project when the community is invited to submit proposals to participate in the project. Of course, preceding this is the process to define selection criteria, etc.

One can work **simultaneously** to obtain approvals: tax approvals, government approvals, other legal approvals, etc.

One might spot a critical milestone that will require a decision of the professional committee: For example, what is done with an initiative that did not succeed in raising the funds it needs? This paragraph is also a measure of success on the way to the overall goal.