

Developing a Salesian Planning and Development Office

A basic guide to develop a project
management office within the
context of a Salesian Province

Developed by



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Read me first:

Path of the PDO; What to expect from this guide?; Who should read this manual?; What's next?

The commitment to serve youth especially the most vulnerable requires the Salesian Provinces to harmonize individuals, processes, managerial criteria and organizational structures. In the quest for more efficient and professional tools to manage and maximize the resources for developing the Mission entrusted to the Congregation by God, numerous "Project Offices" were established.

Today, those Project Offices have evolved in various models from doing very basic tasks related to project life cycle management, to actively contributing in strategic planning for the development of the entire Salesian Province.

According to the formal definition, the PDO (Planning and Development Office) is an entity, juridical or otherwise, instituted and owned by the Salesian Provincial Community (C.44, C.58 Salesian Constitutions), fully at the service of the Salesian charism in the province¹. This concept is for sure a very wide description of what any of the ministries in the Province should be: Youth Ministry, Social Communication, Formation, Missions, and Administration.

It would be desirable to have a proper concept for the PDOs. A definition with detailed differentiation of the role and functions of these structures within the Province, such that the corresponding complementarities can emerge and be, as it should, an instrument for planning, coordination and

¹ <http://www.sdb.org/pmwiki/pmwiki.php?n=Termbase.PDO>

monitoring the implementation of development initiatives either originated by the Province, or the initiatives in which the Province participates jointly with other members of the Salesian Family or civil organizations.

To build-up a comprehensive concept of the PDO, it is necessary to acknowledge past experiences. Therefore, it is appropriate to trace the key milestones of what the "Path of the PDO" had been over the past 20 years.

Path of the PDO

Project Offices: The Beginning

Fr. Václav Klement, Councilor for the Missions, stated in his inaugural address at the Hyderabad - India seminar (2011), "about 20 years ago due to the initiative of different Salesian Mission Offices (Procura Missionaria in Italian language) and Missions related NGOs, some provinces started 'Project Offices' as a point of reference for the projects submitted to various agencies."

The Manual for Capacity Building

In the 90's, Salesian Missions developed a manual to build up basic institutional capacities to write project proposals to meet work's needs. The manual consisted of twelve chapters ranging from basic elements of planning and programming to suggestions on how to make effective presentations, including project design, project evaluation, financial management, and the logical framework, among others.

This Manual helped the newly created Project Offices to improve the quality and effectiveness of the proposals submitted to funding agencies in Europe and United States.

The PSP Methodology

The Belgian Procure Via Don Bosco (former DMOS – COMIDE) developed a strategically-driven methodology, specially for the Salesian Provinces located in Latin America, Africa and India. The implementation of the “Participative Strategic Planning method” also known as PSP, in the last 10 to 12 years, have promoted the enhancement of institutional capabilities, not only for the PDOs but for the whole Province, in the designing of long-term programs aligned to the Overall Provincial Plan –OPP -.

1st Seminar on ‘The Planning and Development Office in a Salesian Province’ (Rome, April 2005).

Maybe one of the most important events in this process was the convocation of this seminar organized together by the General Councilor for the Missions, the General Councilor for Youth Ministry and the Economer General. During the seminar, many aspects such as the experience gained over the last two decades, the challenges arising from the globalized world, and the role and functions of the PDO, were reviewed.

The conclusions of this roundtable, still in force, have been one of the driving forces in the development of this Guide.

General Chapter 26 (Rome, 2008)

Adapted from the Session 1: Introduction by Fr. Václav Klement, Councilor for the Missions (Hyderabad, November 6th 2011)

- General Chapter 26 of the Congregation (Rome, 2008 ‘Da mihi animas, cetera tolle’), the fourth nucleus about Witness of Evangelical Poverty is asking the Salesians to make more credible

our poverty through Personal and community witness (Guideline 12), Solidarity with the poor (Guideline 13), and responsible of resources in a spirit of solidarity (Guideline 14). In particular n.93 asks the Rector Major to help the Provinces grow in their commitment on behalf of social justice and in n.97 it states: more practical solidarity of resources ...among provinces and regions; ensure effective supervision of Provincial Economer operations; give directions for equitable distribution; management of financial resources in an ethical way, in a spirit of solidarity.

- Also in the area of New Frontiers, the fifth nucleus of GC26 (New models for managing works, Guideline 17) provided guidance for more systematic and professional management of our resources.
- GC26 is already taking for granted (n.96,107,111), that the 'Overall Provincial Plan' (POI - "Progetto organico ispettoriale" in Italian) already strongly suggested in GC25 (2002), is used as the ordinary strategic tool in the development of each Province. **Although the PDO is not mentioned as a concrete 'structure' for planning, coordination, formation at the provincial level, many of the processes wanted by the GC26 (n.104) are pointing in that direction:** ... from occasional attention to poor young people, to lasting and focused projects in their service; from a welfare mentality, to involving poor young people in being active agents of their own development and active in the social and political field; from intervention directed to the victims of injustice, to networking to combat the causes of injustice.

Six-year-plan of the Rector Major 2008 - 2014

- In the plan for his second term as Rector Major, Don Pascual Chávez raises two specific lines of action for the whole Congregation regarding PDOs (*Part II, Missions, Area 3, 3.2.1.1 and 3.2.1.2*): "Promote and consolidate Planning and Development Offices in the Provinces" and "Help Provinces and accompany PDOs with clear Salesian criteria for development of the Salesian mission"².

Planning And Development Office Seminar (Hyderabad, November 2011).

Lastly, the seminar in India, had three specific objectives: *Assessment of Salesian PDO process over the past ten years; PDO at the service of the Salesian mission; and Capacity building of the Salesian PDOs.*

Many important aspects were discussed over this 5-day summit, all of them related to future trends for the Salesian mission, challenges for the PDOs, sustainability, financing and accountability, PDO role and synergy.

From the numerous group sessions emerged some necessities, for instance, counting on general guidelines and minimum standards for the PDO at the Congregational level.

What to expect from this guide? Who should read this manual?

This manual is envisioned to help the animation of the Salesian Provinces (Provincials, Provincial Economers, Provincial Councils and PO Directors) through the setting-up (or restarting) process for a PDO in each **Province**.

² ACG 402, 2008

This deliberate approach is motivated basically because most of the existing PDOs in the Congregation belong to the model in stages 0, 1 and 2. Which, as we will see in chapter 1, have a minor contribution in promoting coordination and providing expertise for the Province and its presences.

Concerning the boundaries of this guide, it is important to clarify that this is not a project management manual. It is not an exhaustive instructive for the day-to-day work at the PDO. It proposes a quick and useful read for those who have the decision-making responsibility and for those involved in the primary phases of the actual project, of creating a Planning and Development Office.

Lastly, the reader should be aware that in the PDOs, just as in every manifestation of the Salesian Charism, "one size does not fit all". Thus, this compendium does not aim for uniformity but rather unity in the realm of the PDOs.

What's next...

This guide is divided into three main chapters, which are meant to be short, simple and concise:

- The first one follows the natural process of shaping up this new concept. It strives at setting the grounds for the PDO by defining its nature, role and functions; and then, by responding to the basic questions about "how" and "where" to start.
- Moreover, after the decision of "**Starting a PDO**" has been made at the Provincial level, the basic steps for establishing a new PDO or evolving

from the current structure, are presented on “**The PDO implementation**”.

- Finally, a chapter about the basics of “**Project Management**” has been included to call attention to the processes of the most important tasks that PDOs should perform.

. Starting a PDO

What should be done first?

To establish a new Planning and Development Office, or, even to transform a project office into a more complex organization is a project in itself. As such, the project life cycle needs to be applied on scope, time and budget.

The project of setting up a PDO should be the first successful experience in its portfolio.

This chapter begins by defining the Planning and Development Office within the context of a Salesian Province:

Towards a common vision of the PDO

The path of the PDO until today shows convergence in some features of the Planning and Development Offices such as their expected functions, but also a lot of divergences in the model they follow, their staffing, the number of projects on their portfolio, and the scope of their work at the Province level. However, it can be started by mentioning **some of the common qualities that any PDO must have** regardless its size, capacity, and extent of its functions:

1. Is an organization instituted by the Provincial and his Council.
2. The mission of the Planning and Development Office is to bring expertise and a well-defined approach for the planning,

implementation, monitoring and evaluation of plans, programs and projects, either at the Provincial or the Local level.

3. The PDO is at the service of the Salesian Province in perfect integration and complementarity mainly (but not only) with Youth Ministry and the Provincial Economist. The PDO is not competing by doing the pastoral-educative service that corresponds to the Provincial Ministries or the Parishes, Oratories, Youth Centers, Schools, and other forms of Salesian presences to the young.
4. The PDO "is the point of reference within the Province for synergy, cooperation and coordination, so that the Overall Provincial Plan – POI- and Educative Pastoral Plan – PEP-, can be implemented and the harmonious and dynamic growth of its various activities can be ensured"³.

The Role and Functions of the Planning and Development Office

Adapted from the Conclusions of the Seminar on The Planning and Development Office in a Salesian Province by Fr. Francis Alencherry SDB, (Rome, April 2nd 2005)

This compendium reassess and updates the most important functions of a Planning and Development Office, based on the feasible roles of a PDO, as proposed back in 2005:

- It assists the Provincial and his Council to have a rational approach to human and socio-economic issues and challenges in the whole province, playing a key role in the preparation of the Overall Province Plan – OPP-

³ *Conclusions of the Seminar on The Planning and Development Office in a Salesian Province by Fr. Francis Alencherry, (Rome, April 2nd 2005)*

and the Educative Pastoral Plan – PEP- and their implementation. It acts as a “think tank” and, in synch with the Youth Ministry Team and local communities, assists in the development and submission of comprehensive programs of development for the various regions within the province, outlining micro/macro projects that are necessary to realize them, ensuring that they are in harmony with the OPP and the PEP.

- By means of its expertise and a well-defined methodology, the PDO assists the Province and the presences to prepare (write out), the projects that are meant to implement the development plan of the province and after due approval by the Provincial Council, presents them to funding agencies, e.g. Salesian NGO’s, local governments, private companies or even resources of the Province.
- Once the projects (of any scale or scope) have been approved, the PDO makes sure that the proper project management processes are followed: Initiation, planning, implementation, monitoring and evaluation. **(See Chapter 3. Project Management/ Project life cycle)**
- When called upon, it studies and reaffirms the plans of the province for opening new salesian presences, furnishing reports on the feasibility and sustainability of such presences, in order to guide the decision making process of the Provincial and his Council.
- It sensitizes the province to the urgency of working for social justice and takes up initiatives in the field of advocacy and lobbying on behalf of the poor and the marginalized, especially children and youth.
- Working in close collaboration with the Youth Ministry Team, it brings about synergies in similar activities of a socio-economic nature in different institutions/houses within a province and facilitates the networking among these for the achievement of common goals.
- It engages in fund raising activities to carry out the projects of the province. In particular, it occupies itself with the ongoing economic viability of the projects already initiated.

- It attends to the training and the ongoing formation of personnel, both Salesian and lay, necessary for carrying out development projects. It gives special attention to capacity building. Moreover, it takes care that the true protagonists of development are the people themselves.
- It furnishes information regarding socio-economic issues to the Provincial and his Council and to whoever is involved in development projects. Accordingly, it carries out research and documentation and develops expertise in these fields.
- It facilitates and promotes various forms of networking within the houses of a province, thus bringing about the sense of solidarity and mutual support. Where and when possible, it liaises and networks with other (non Salesian) organizations in the socio-economic sector in order to create local networks that further strengthen its activities (e.g.: collaborations with the educational sector for educational projects, with the economic sector for employment schemes, with the social sector for social schemes...).

Models of the Planning and Development Office

As a result of the surveys sent to the Provinces in 2011, the Counselor for the Missions identified various types of models of the "PDO" in the Provinces. Some of them indeed are paradigms of the progressive stages at which a Planning and Development Office can go through.

However, depending on the requirements of the Province, the purpose of founding a Project Management Office could be as simple as a unit for proposals writing or a fully functioning department at a Province level.

Firstly, results are recalled in order to describe the current state in the Congregation regarding PDOs. Secondly, it is suggested to revise and adapt (if valid) the progressive stages proposed by the Institutional Development chapter on the PSP methodology employed by **Via Don Bosco**. For the complete list, please refer to the chapter: BASIC TOOLKIT.

Different models of PDOs

(From the First and Second Survey sent to the Provinces, 2011):

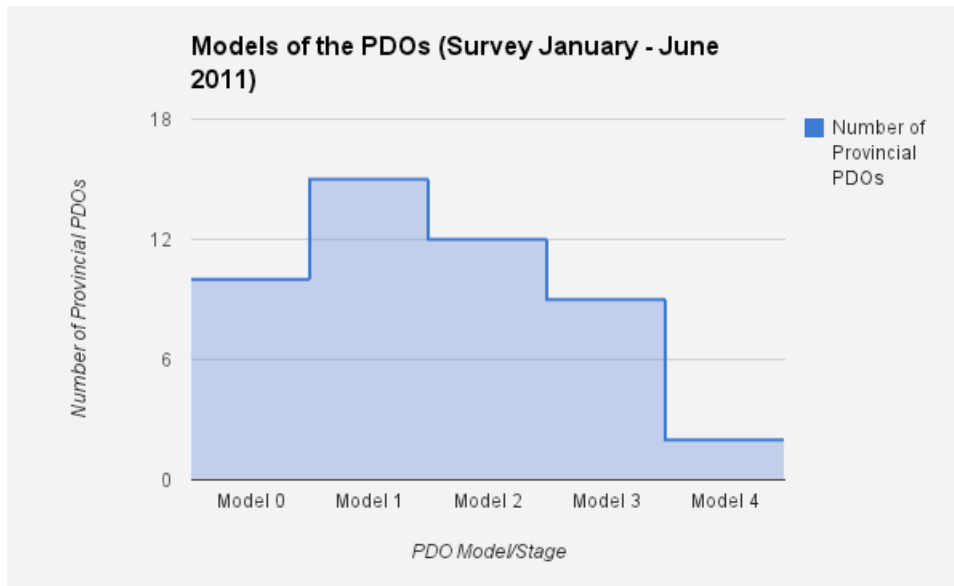


Figure 1: Models of the PDOs - First Survey (PDO 2011)

Figure 1 shows the distribution of the PDOs across the models or types from 0 to 4. Most of them are under the stages 0, 1 and 2 in which their contribution in promoting coordination and providing expertise to the Province and its Presences, is nonexistent or very limited.

- **Model '0'**

Province is still struggling with some 'individualized' management of some works. The projects carried on with some foreign agencies are depending just on the rector of the single community concerned. There were some attempts at a more integral approach in the province with a help of one 'office', but so far there is no provincial coordination in this field.

Or the Province needs to start or re-start their Project Office/ PDO after some difficulties.

- **Model '1': Project Office (PO) stage/model:**

There is a point of reference for all development projects in the Province, but very low key. PO is staffed only by one lay person, writing projects on behalf of the local communities. PO is at the service of the local communities and works; there is only a small impact of the office on the provincial animation. There are some different versions of this model:

Project office with some fundraising activities (local or foreign benefactors network) or looking for other necessary personnel or financial resources

Project office involved also in the formation of SDB or lay staff in the houses (usually in the field of management, accountability, helping the communities to understand the project cycle)

Project office facilitates the contact with the donor agencies, facilitates the network of different kinds of similar work within the Province.

- **Model '2': Planning – Project Office (PPO) stage/model:**

Beyond the 'Project Office' model 1, this model is more involved within the provincial animation structures. The office does contribute to the provincial planning and animation, at times helps also to work out the OPP (Overall Provincial Plan) or the Provincial Strategic Plan together with the Youth Ministry Delegate (or commission). There are some different versions of this model:

- *PPO works with a larger (ad hoc) commission composed of SDB and lay mission partners;*
- *PPO director participates in the YM commission; the YM delegate takes part in the PPO board;*
- *PPO serves as a real 'catalyst' in the provincial animation and discernment.*

- **Model '3': Planning and Development Office (PDO) stage/model:**

After 2005 Rome seminar some provinces have reached this stage of growth. PDO helps the local communities to develop their mission according to a plan. PDO is also involved in the formation of lay mission partners. PDO helps the Salesians to move from the 'charity' or 'institution' mentality towards the 'systematic development work' in the mission.

- **Model '4': PDO contributes to the planned and participatory development of Salesian Mission.**

PDO is also involved in the territory, local society: through empowerment of processes on behalf of the youth or the poor. PDO networks with nearby Province PDOs, other non-Salesian agencies or government agencies in the country. PDO is also involved in lobbying and advocacy, working in the field of social justice and peace (reconciliation).

- **Other possible situations emerging from the surveys**

- PDO works only for some 'special kind' (ex: training centers) of works in the Province
- PDO is not part of the provincial animation structures; only 'provides provincial services'.
- PDO is run basically with expatriate (volunteer) staff, changing quite often.
- PDO not only coordinates, but also implements larger projects for the local communities.
- PDO is not yet part of the provincial culture, SDB are not yet convinced about its importance.

Key factors

Acknowledge the past:

The past experience of the PDO (if any within the Province) is a significant source of knowledge. Regardless of the previous results, the animators of the Province must revise and acknowledge the path followed so far and then clearly articulate how the new initiative will fit together to help achieve the purposes of the PDO.

Facing the challenges:

Adapted from the Conclusions of the Seminar on The Planning and Development Office in a Salesian Province by Fr. Francis Alencherry, (Rome, April 2nd 2005); and the document: Challenges facing PDOs Today by Fr. Mc George, (Hyderabad, November 7th 2011).

As a result of both, the 1st seminar of the PDOs in Rome (April 2005) and the surveys presented during the Hyderabad Seminar (November 2011), many challenges for the future have arisen for the PDOs. Here we present the most relevant:

- **A common understanding of Development:** “For us Salesians evangelization and human promotion are intimately linked and inseparable realities. The two add up to what could be called the integral development of the people for whom and with whom we work (cf. Const. 31). Consequently, for us developmental work is not mere social work. It has to have a soul, which is supplied by the active and fearless proclamation of the Gospel”. (...) “Carrying out developmental activities from the perspective of our charism, we engage in educational activities for the benefit of the poor and the marginalized children and youth. Further, through education we seek to form young people who are committed to the cause of justice, peace and the creation of a fraternal and egalitarian society. Our education not only liberates people, but brings forth ‘liberators’ who are committed to fighting against injustice and the creation of a more human environment, a more equitable social order”.
- **Synergy, collaboration and complementarity with all the sectors of the Province, specially Youth Ministry, the Provincial Economist and his department:** When declaring the mandate for the PDO, the Provincial and his Council, must assure that structurally and operationally there is collaboration, coordination, respect for roles and competence, plus mutual enrichment between the Planning and Development Office and all the sectors in the Province. Overlapping or competing programs and functions must be avoided, otherwise the PDO could be perceived as a burden, generate confusion, and eventually lose its credibility and acceptance within the Province.
- **Capacity building. Continuity / Stability.** “We need to become professional. We lack qualified, trained and experienced SDBs to be directors of PDOs. All donors, whether multilateral institutions,

governments, corporate bodies, funding agencies or private individuals, expect Salesians to be professional in the analysis of the problems we face, the solutions we propose, the implementation of programs, accounting, monitoring and evaluation. Governments in all countries are coming up with laws that demand more and more technical qualifications and professionalism even in works of 'charity'. Sincerity of purpose and good will are no longer sufficient 'licenses' to let us do well. Professionalism also ensures greater continuity to the nature, quality and quantity of our work as they will not depend solely on the personal capacities of an individual alone".

- **Selection of projects.** "The selection and management of projects to be financed, the seeking of funding methods and the manner in which they are used should not condition the province's Overall Project but should rather draw from the latter the programming and practical indications that will combine to achieve an effective and faithful result".

Leadership: commitments from the upper management

When starting the Planning and Development Office, the Provincial and his Council, should be sufficiently aware of the strong and permanent commitments that it requires:

Responsibility	Specific Duties
Accountability	<ul style="list-style-type: none"> • Keep the PDO on track - Meet regularly with PDO team to review progress of ongoing projects, key milestones and outstanding issues. - Hold the PDO director accountable for meeting objectives, producing deliverables, conducting reviews, and communicating changes to the involved presences and sectors. - Share accountability with the PDO – In the presence

of problems, it's not only the PDO director or the PDO team.

- **Be available**

- Be readily available and accessible for consultation with the PDO team
- Help address conflicts or when roadblocks occur for PDO team.

Strategic Fit

- **Assure that PDO is consistent with the Overall Provincial Plan and the Educative Pastoral Plan**

- Ascertain that the direction for PDO strategy and for the projects developed by this.

Resources

- **Provide or locate resources for the PDO and the projects**

- Provide funding for the PDO creation, functioning and development.
- Lead efforts to secure external funding for programs and projects.
- Review and approve periodic financial reports.

Lead institutional change

- **Help position the PDO within the Province**

- Officially affirm PDO director and team.
- Provide official backing of the PDO and its projects
- Be clear on the expectations set around the PDO and help define the scope, schedule and resource needs.

Celebrate PDOs Achievements

- **Recognize the PDO for progress and successes**

Adapted from Stanford Advanced Project Management and IPS Solutions, 2005

Where to start?

1. Decision-making: Write down the PDO mandate

One of the most important steps to build a PDO is the definition of its mandate. Often this primary phase is overlooked under the assumption that everybody recognizes what the PDO is for within the Province, therefore the mandate is never formalized.

The PDO mandate is more than a document; it represents the agreement of the Province to foster the development of the PDO and with it, the willingness to dedicate resources for its implementation, and to serve as a sponsor of its activities.

Hence, the first building block is to write-down and to formalize the decision, either to start a PDO from scratch, or reforming the current Project Office -PO, Planning and Project Office - PPO or Planning and Development Office - PDO.

The PDO mandate is a one-page statement that defines the background, mission, vision, goals, strategy, major functions, and organizational form (leadership and staffing). It also may outline the impact of the PDO on stakeholders such as Youth Ministry, the Presences, and even the administrative services of the Province. Since the PDO mandate should be made official at the beginning, it might include as well, a general schedule with the key milestones in the implementation process of the PDO.

2. Link the PDO strategy to the OPP strategy

The PDO strategy is the higher-level roadmap that describes how it will achieve its mission. However, this frame is directly derived from the Province strategy that is found in the Overall Provincial Plan – POI-. The alignment between PDO and Provincial strategy is not just a matter of written

statements, it should be verified in the incorporation of Provincial objectives and priorities, metrics, beneficiaries, organizational culture.

A close alignment between the PDO strategy and the POI will ensure that all projects undertaken under the PDO management, actually fulfill the demands of the Salesian mission. Then the PDO will gain significance within the Province as a powerful tool for supporting the presences and pastoral services.

3. Insert the PDO in the organizational structure

Starting a PDO might have a major impact on Province's organizational structure. This transformation needs a well-designed model so all stakeholders can associate processes, systems and channels.

An organizational structure is not just a series of boxes and lines on a page or a map of reporting relationships. It represents the fundamental components of the organization — and how they relate and interact (Deloitte, 2005). Thus, the PDO director assisted by the Provincial, his Council and the area of organizational design, can encompass in it, everything from determining who does what, how decisions are made, and how work flows to defining the competencies and standards against which the PDO performance can be evaluated. It also can define service levels, relationships with Presences or Youth Ministry, and more.

There are many organizational models for PDOs within the Congregation; some of them are presented here. However, when starting a PDO, its director or the team responsible for the implementation, should study the Provincial organizational model and formulate a transformed model of its own.

ESDA STRUCTURE MACRO (Country level)

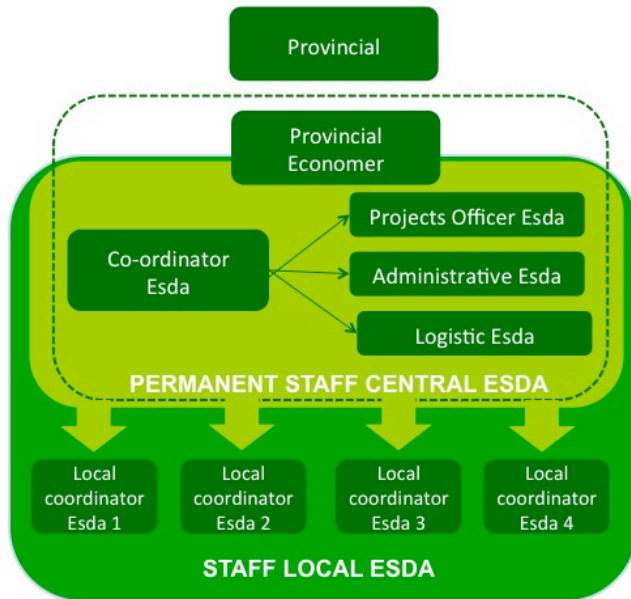


Figure 2. Case study: PDO in Angola - "ESDA: ESCRITÓRIO SALESIANO DE DESENVOLVIMENTO DE ANGOLA". Volontariato Internazionale Per Lo Sviluppo – VIS. Hyderabad Seminar, Nov 2011.

Jóvenes y Desarrollo – JyD (Hyderabad Meeting – Nov.2011)

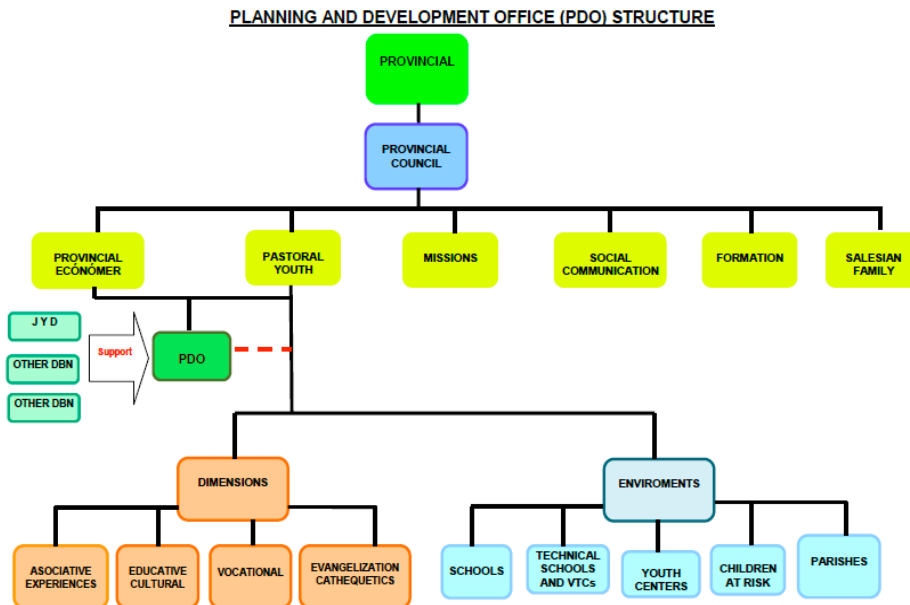


Figure 3. PDO Capacity Building – Role and Tasks of a PDO (JYD Experience) – The PDO in the Provincial Organizational chart. Jóvenes y Desarrollo Hyderabad Seminar, Nov 2011.

4. Identify the stakeholders and direct beneficiaries of the PDO action

It is well understood that the privileged receivers of the Salesian educative-pastoral work are youngsters, specially those most vulnerable. Consequently all efforts made by the Provinces are meant to contribute to this commitment.

With this in mind, it is essential to clearly define both the stakeholders and the beneficiaries of the PDO. The former are individuals who have a vested interest in the success of the PDO and the projects undertaken by it such as the Provincial, his council, donors and partners. While the latter, are primarily the pastoral services and presences that request PDO support. Depending on the scope of the PDO functions, it also includes the target beneficiaries of the projects when the PDO is also responsible for the execution of the project tasks.

The PDO director should identify stakeholders early in the development of the PDO and determine their needs and expectations. The same applies for beneficiaries, particularly regarding Pastoral services and the Presences, the PDO will support their projects, hence the importance of paying attention to the community needs and their conditions in the socio-economic context. This is a critical factor for successful project planning and delivery.

5. How big should the PDO be?

Generally, the size of the PDO is related to its role within the province. If there are just a small number of projects under way, probably the office will have just one full-time project manager and the Director of the PDO (e.g. The Provincial Economist). The staff may be increased if more responsibility is assigned to the PDO.

At the initial stages of the PDO and as long as possible, the Economer or the PDO Director must ensure full coordination and complementarity with the administrative services already established in the Province, such as accounting, human resources and acquisitions. Thereby, the PDO would be cost effective and perceived as providing necessary services.

2. The PDO Implementation

Putting the pieces together

Building a successful Planning and Development Office has structural components similar to any other project. A basic review of the processes and institutional capacities contributes towards a solid foundation.

Basic Processes

Processes related to the product to be delivered:

Typically, managing knowledge and methodology for developing and implementing product-oriented processes is a function of the presences and the pastoral services within the province. Therefore, these processes are outside the scope of this guide, but still, it is imperative to remind the PDO team, the importance of working closely with those services along all stages of project life-cycle, in order to ensure the quality of the project activities and outcomes.

Processes related to project management

Project management processes are concerned with describing and organizing the work of the project. The standard methodology is built around five processes: initiation, planning, execution, monitoring and closing. Chapter three further develops each process.

Fundraising

The fundraising function is considered one of the most important roles of the PDO to accomplish its strategic goals, by means of grant writing, events, campaigns, and other activities.

The fundraising process is more than sending requests for resources to a wide group of agencies. Finding funds is a systematic effort in an attempt to identify and cultivate the funders that have interests in line with the salesian charism and the provincial strategy to build good and trusted relationships.

Strategic planning

(Adapted from “A Strategic Planning Process for Non-Profit Organizations, BRYSON, J)

Besides performing the strategic planning process for the PDO itself, the Planning and Development Office should master a methodology to support the Province in formulating, revising and evaluating the Overall Provincial Plan – POI – as well as for the pastoral services of the local communities.

“Strategic planning is a disciplined effort to produce fundamental decisions and actions shaping the nature and direction of an organization”. Regardless of the methodology in force, this process typically consists in eight steps:

1. Development of an initial agreement concerning the strategic planning effort.
2. Identifications and clarification of mandates.
3. Development and clarification of mission and values.
4. External environmental assessment.
5. Internal Environmental assessment.
6. Strategic issue identification.
7. Strategy development.
8. Description of the Province (organization) in the future.

Coordination and articulation

Given the complexity and multiple manifestations of the Salesian educative-pastoral work, the PDO should become a reference for coordination and articulation between project teams, presences, funding agencies, and other stakeholders.

It is important to highlight that coordination and articulation are much more than communicative performance. It is an inclusive process intended to maintain the strategy and values consistent over all projects implemented by the Province with the support of the PDO and to avoid overlapping or duplication in activities, as well as waste of time and resources, and lack of credibility.

Basic Capabilities

Staff expertise

Most of the relevance brought by the PDO to the Province, lies in the specific competencies of its personnel. Therefore, it is absolutely imperative to develop both technical competencies (project management / project life cycle management) and management/leadership competencies (team skills, negotiation skills, conflict resolution skills).

Besides those project management related skills, there are also other competencies for the PDO team to develop in order to increase the level and quality of support services offered to the Province:

- Effective written and oral communication skills, given the high interaction that the PDO is expected to have with stakeholders and beneficiaries.
- Grant writing / Proposal writing / Terms of reference writing.
- Knowledge management.
- Basics of financial management.
- Basic knowledge of Information & Communications Technologies - ICTs

Methodology

The PDO should develop and implement a project management process of its own. Commonly Project Offices within the Salesian context, follow the processes and apply the methodologies proposed by the donor or the intermediary agency. However, the requisites and general structure vary across funding agencies and so vary the development and implementation of projects implemented by the Province.

For the sake of better monitoring the projects undertaken by the Province and its presences, the PDO must ensure that a common framework is employed for all initiatives executed by the Province. This methodology can be as simple or elaborated as the PDO strategy suggests. It might be even derived from one of the methodologies proposed by a funding agency, as long as it results in practical relevance for the PDO and the Presences.

The following steps and questions are suggested to define and implement a project management methodology:

1. Identification of needs and expectations:

- a. Identify the most common problems in project management (Lack of information, activities behind schedule, reviewing over budgets).
- b. Which project methodologies have been used? Which experiences were successful (lessons learned)?
- c. How many projects are currently in implementation stage? Do the funding agencies propose any methodology to manage these projects?
- d. To what project management standards did the Presences respond better? What requirements were not fulfilled?
- e. What practices of documentation are currently followed?

2. Agree on general requirements and features expected from the methodology:

- a. Determine the scope of the methodology in relation with the project management processes (initiation, planning, executing, monitoring and evaluation & close-out).
 - b. Determine to what type of projects the methodology will apply.
 - c. Describe in general terms the activities and sequencing included in the methodology.
 - d. List and design basic templates and forms to collect the necessary information.
 - e. Attempt to harmonize the proposal with the requirements of the most important and/or frequent donors. In this way, the methodology will not conflict with the framework required by them.
3. Put the methodology in place:
- a. Document the methodology by listing all cyclic processes, activities and tasks; and then sequence them.
 - b. Describe roles and responsibilities concerning each activity and task.
 - c. Prepare all templates and forms. Make sure they are available in a web blog or electronic repository for downloading.
 - d. The methodology should be reviewed and updated periodically aiming to make it more effective and better suited to the needs of the Province, the Presences and the Pastoral services.

Vast understanding of the Salesian mission and its manifestations

The PDO is expected to bring in professional expertise in project management, strategic planning and economic management for the province. It is also crucial to develop and periodically update its knowledge about what Salesians do, for whom they do it, where does the Salesian action has impact, and what kind of pastoral-educative services are offered.

Fr. Francis Alenchery in 2005 stated the essential criteria for PDO staff:

"With the Rector Major, Fr. Pascual Chavez, we affirm that as Salesians we "believe in children, in teenagers, in young people, for they represent the most important resource of any country." Hence we put our "money on education, as it is the most precious gift we can give them to prepare them to face the future with some guarantee of success." Carrying out developmental activities from the perspective of our charism, we engage in educational activities for the benefit of the poor and the marginalized children and youth. Further, through education we seek to form young people who are committed to the cause of justice, peace and the creation of a fraternal and egalitarian society. Our education not only liberates people, but brings forth 'liberators' who are committed to fighting against injustice and the creation of a more human environment, a more equitable social order".

Leadership to address the transformations

The very foundation of a PDO is a major organizational change for the Province. As such, it could generate strong resistance from the organs or communities already established within the Province. This situation requires the PDO to build commitment through greater leadership.

Leadership is a holistic capacity that brings together other managerial skills such as: communication, impact assessment, flexibility, reinforcement of values, two-way dialogue, consistency, empowerment and the ability to provide feedback.

Communication

The ability to identify, create, review and transmit the right messages with stakeholders, beneficiaries, peers and the team is most valuable in a PDO. Effective communication is best seen as knowledge creation and can be defined as information that is provided in context, is relevant and is actionable.

Adequate communication activities can avoid distraction and lead to higher efficiency within the projects. The PDO team should focus on both formal and informal communication in order to produce relevant information for managers, stakeholders and the public. The PDO should focus on establishing guidelines for communication events meetings, reports, and documentation and the channels through which the messages will be communicated.

Communication management includes:

- ➔ Providing a clearly articulated purpose for each meeting;
- ➔ Providing templates for meeting agenda, minutes and reports;
- ➔ Documenting all decisions;
- ➔ Encouraging brevity and precision in all communications;
- ➔ Keeping records of roles and contact information for stakeholders and recording beneficiaries for reference and easy retrieval;
- ➔ Recording actions in terms of responsibility and specific targets for completion.

Funding agencies, donors and aid for development

A large proportion of the funds received by the current PDOs come from the requests that Salesian mission Offices in developed countries present to their governments, private companies, NGO and small donations made by people that support the Salesian mission.

However, over the past years, money for development projects/programs has been cut back, reductions have been seen for target causes as well as eligible countries. This situation imposes a major challenge for PDOs that in first place must 1) be well aware of these trends, 2) collect information about official and non-official financial assistance for development flowing into the country, 3) attempt to identify opportunities and threats, 4) incorporate to the extent possible, the language used by donors and funding agencies in the PDO activities, communications and projects.

Data collection and Metrics

As quoted by HP founder, Bill Hewlett “you cannot manage what you cannot measure”, and its corollary “what gets measured gets done” (Eckerson, 2006), the PDO must support the Province in tracking organizational performance by defining, collecting, analyzing and using project metrics.





Those metrics or indicators help to establish at a given time the status of project activities, outcomes and deliverables.

A disciplined and systematic process for collecting data from projects, beneficiaries, stakeholders and the entire pastoral-educative work, will give to senior management the necessary information to measure, monitor, and manage the key activities and processes in order to track the level of achievement of strategic goals, improve efficiency and make projects visible to the community.

Day 0: What needs to be done before starting?

As stated above, the development and implementation of a PDO is a process that could several months, but it is important to place intermediate goals to ensure “visible and meaningful early wins”.

The “kick-off” meeting is the opportunity to share with stakeholders the plan for leading the initiation of PDO activities. It is desirable to present during this meeting, the PDO mandate and the team responsible for its execution. PDO director should make sure that at least the following four conditions are met before the Kick-off:

- | | |
|--|---|
| 1. Write down a proposal |  |
| 2. Establish a Vision and Mission |  |
| 3. Define terms, roles and purposes |  |
| 4. Set up a space for the PDO |  |

About those four conditions, here are some notes that the PDO director should consider:

- ➔ The PDO proposal is not the same as the PDO mandate. The former is the project plan of setting up the PDO, it should consider the six steps of project life cycle (Please refer to the Chapter 3. Project Management), defining for instance: milestones, deliverables, schedule, metrics and more.
- ➔ The vision and mission of the PDO are not the same as those of the Province. The PDO is intended to support the Province and its presences to realize their goals and purposes. Thus, the PDO requires a mission statement that clearly identifies why it exists, and a vision that aligns the goals and values of the PDO.
- ➔ Identifying, documenting and assigning project roles, responsibilities and reporting relationships. It is important that responsibilities be delegated in an effective manner and understood by all parties. This process should also identify the necessary working groups.
- ➔ Having a work space for the PDO is a key factor to foster team spirit, communication and coordination. If possible, try to put the PDO staff in a differentiated space with the necessary equipment and facilities.

3. Project Management

The core of the Planning and Development Office

Even though, the PDO is expected to fulfill a wide variety of functions within the province, the responsibility to implement and manage its projects (of any scale or scope) through completion, is considered the “natural job” for the PDO.

This chapter is intended to “refresh” the processes related to project management, that PDO should perform with higher expertise.

Project Management is the application of knowledge, skills, tools and techniques to project activities in order to meet or exceed stakeholder needs and expectations.

***Project Management Body of Knowledge –
PMBOK Guide***

The projects developed by The Salesians

Salesian Presences and Provinces prepare and implement projects in a wide range of sectors and with extensive variety of activities, from construction of educative infrastructure to qualification of teachers in schools and technical institutes, Salesians undertake numerous projects of all scale and scope.

Those projects can be classified in the following categories according to their main purpose:

- ➔ Physical infrastructure and equipment;
- ➔ Education and vocational training of vulnerable youth;
- ➔ Humanitarian assistance and disaster relief;
- ➔ Support for religious vocations;

- Job placement for youth;
- Capacity building;
- Preventive campaigns; and
- Support for pastoral activities;

Regardless of which category a specific project belongs to, the project management methodology should be applied to ensure:

1. Complete correspondence with the strategic vision of the Province,
2. Higher effectiveness in resource allocation and management,
3. Better accountability,
4. Transparency, and
5. Greater significance and relevance in the transformation of the situation for the beneficiaries.

The three dimensions of project management

It is important to understand the differences and relationship between the three dimensions of project management:

1. Project life cycle,
2. Project management responsibilities, and
3. Project management processes.

Under the definition of project as a temporary endeavor undertaken to transform a given situation, ***Project life cycle*** is the sequencing of stages over which a project takes place. The life cycle structure can be mapped as:

- Designing the intended product or service;
- Defining and preparing necessary inputs;
- Carrying out the project work; and
- Close-out of the project.

Meanwhile, the ***project management responsibilities*** correspond to all processes and activities needed to coordinate the various management processes along the stages of the project life cycle.

Finally the ***project management processes*** are those performed aiming to define, organize, execute, track, and finalize all activities across projects.

Figure 4 shows a representation of those three dimensions that must be dominated by the PDO to successfully manage all project activities to realize stakeholders' expectations and beneficiaries' requirements.

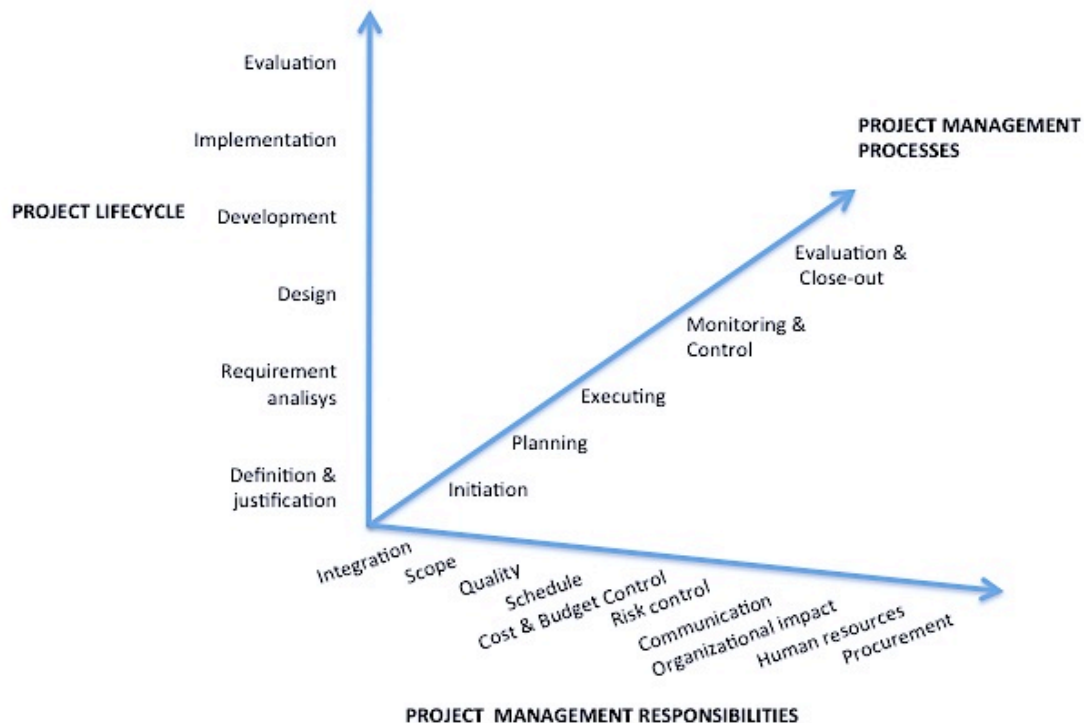


Figure 4. The three dimensions of Project Management

(Adapted from Project Management Methodology – LA ITA Project Management Support Office)

Project management processes

(Adapted from Project Management Body of Knowledge –PMBOK Guide, 4th edition & Project Management Methodology – LA ITA Project Management Support Office)

The five project management processes are (sometimes, even overlapping) activities that occur at varying levels of intensity throughout each phase of the project.

The five project management processes are defined briefly below. The Project management methodology designed / adopted by the PDO should be structured around these processes and the required deliverables from each process.

1. Initiating:

This process comprises defining a project, and organizing to start a project or a phase within a project. The project definition and justification phase of a project does not necessarily require a detailed plan. This process involves the definition of formal commitments of the PDO and the Province, Presence or Pastoral service that identifies an opportunity or need in its respective community and wishes to initiate a project. As a result of the project initiation process the PDO should generate a project charter (See Basic Toolkit).

Some of the most common activities during initiation of each project phase are:

- ➔ Identify all project stakeholders and their goals or interests.
- ➔ Look for consensus; these agreements must be maintained throughout the project among all the stakeholders regarding the following aspect: scope, deliverables, roles and responsibilities.

- Acquire/set up space, equipment, and facilities for the project team.
- Organize the assignment/recruitment/transfer of employees and/or contractors to the project team.
- Conduct project/phase kickoff meeting (**see Chapter 2/ Day 0: What needs to be done before starting?**).
- Conduct initial team orientation/training (although most training will take place after Initiation, some basic orientation and training may be necessary in this phase).

2. Planning:

The objective of this process is to develop and maintain a workable plan to accomplish the project or project phase. At this phase, the PDO should define what needs to be done, when, by whom, and all resource requirements. Planning is a continuous process that interacts with project initiation, execution, and control. It is done at various levels of detail depending on where the project is in its life cycle and the intended use of the plan. For instance, a funding request for a Salesian Mission Office will contain an implementation plan whereas work plans are required for day-to-day monitoring and management of the project.

Project planning is probably the one that demands more effort from the PDO, this is a process concerned with organizing the tasks to implement a project and to meet all project objectives for functionality, quality, reliability, schedule and cost. The purpose of the plan is to provide a framework for management monitoring and control of performance. Among other functions, this process encompasses:

- Defining the scope of the project. Products and services that will be delivered (for example: Training of a number of students in technical skills, construction and equipment of a specific workshop), who the

beneficiaries or users of these deliverables are, and all the associated assumptions and constraints,

- Identifying the project activities that will be performed,
- Identifying major milestones or important actions within the project (for example, obtaining legal recognition for the functioning of a vocational training center),
- Describing the interdependencies between the activities and when the activities will be accomplished,
- Defining the resources necessary to acquire for the implementation and execution of project activities (procurement/hiring), and
- Outlining the processes and procedures that will be used for managing schedule, cost, funding, quality, communications, procurement, staffing, and risk.

The project plan is more than just an estimate of what will be done, when it will be done and the resources required to do it. It is a commitment by individuals and organizations to perform according to the plan. Therefore, it is critical that the individuals who must make these commitments are active participants in the planning process and accept ownership of their portion of the project plan. As a result from Project planning process the PDO should generate a project operative plan (See Basic Toolkit).

3. Implementation:

Once the baseline plan has been developed, approved, and the necessary resources put in place, the project moves into the execution phase. The Project Manager's focus now shifts from planning to executing and controlling according to the commitments made in the project plan.

4. Monitoring and Evaluation:

This process consists in comparing the actual performance and progress of the project against the plan and taking corrective action when needed.

The primary objective when doing the follow-up of activities is to detect as earlier as possible, alerts about problems or variances from the plan in order to take corrective actions. Therefore, it is better to provide early warning of potential problems than to wait until the problems have grown to the point that corrective action is difficult or even impossible. Open, honest and early communications between project team members, project manager, and the stakeholders are the key ingredients of all successful projects.

Once a project has advanced to the execution phase, constant flow of consistent information on the real status of the project is essential to keeping the project on the road to success. This information is generally provided in the form of:

- Written status reports.
- Updates to the schedule, showing actual progress versus plans.
- Financial analysis comparing actual costs versus planned costs.
- Issues/Action item log documenting issues, decisions and action items that may impact project performance, with due dates and status of each.
- Change Control log documenting all change requests with due dates and status.
- Project Review presentations for management and the Steering Committee, summarizing all of the above.
- Team status review meetings.
- Conduct review visits in the field.

(For templates on project monitoring please check Basic toolkit).

5. Evaluation & Close-outs:

Evaluation is a process that must be applied from the beginning of the execution phase, until its closure and even post implementation, impact and sustainability reports can be produced over already finished projects. Performing systematic evaluation on project execution serves several purposes:

- ➔ To measure the extent to which the objectives are met;
- ➔ To identify achievements;
- ➔ To identify learned lessons and areas for improvement;
- ➔ To promote decisions to be taken base on facts;
- ➔ To identify necessary changes to objectives; and
- ➔ To detect improvements for the project management methodology.

In the other hand, closing out a project is the last major phase of the project life cycle. Typically this process includes the following activities:

- ➔ To ensure that all deliverables are complete and meet the goals and objectives of the project;
- ➔ To ensure that all processes and services implemented are in operation;
- ➔ To confirm that deliverables are transferred to the beneficiaries (for example: construction and equipment or capacity building);
- ➔ To close all contracts and cost accounts;
- ➔ To prepare a final project report;
- ➔ To archive project documents; and
- ➔ To conduct a meeting of project completion.

Basic Toolkit

For project management templates and support material, see www.salesianmissions.org/pdobasictoolkit/