TORQAID PROJECT DESIGN DOCUMENT (PDD) TEMPLATE

This short paper explains the Project Design Document (PDD) template/format which TorqAid is most comfortable in using. A shortened one-page version of this is included in Appendix A. The PDD is prepared towards the end of the Planning Stage of the Project Management Cycle (PMC)[1] –. It also complements the TorqAid article 'so what is Participatory Project Management'[2]

Executive Summary

This includes a brief synopsis of the proposed project or intervention. The planning, implementation and post-project stages can often be clearly highlighted by reference to the Project Management Cycle (PMC) diagram[3]. Ideally this section should include a boxed summary stating project name; project number; project location; intended project outcomes[4]; estimated duration; estimated budget; project management.

1. Project/Program Background Situation and Context

1.1. Overall Situation, and Intended Outcome of the Proposed Intervention

An overview of the overall development or humanitarian situation, and how the proposed project or intervention contributes to positive outcomes relating to this. This section includes key maps, and potential sources of funding.

1.2. Understanding the Background Context

An overview of the background Social and Political Environment; Economic Environment; Natural Environment; and Built Environment[5], and the relevance of these to both the development or humanitarian situation in question, and to the proposed project or intervention.

1.3. Project Management Agency Overview

An overview of the main project agency concerned, and particularly its prior involvement in an initiative of this nature.

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[1] See Appendix B for the TorqAid PMC diagram

[2] See www.torqaid.com/what-is-ppm/

[3] Included here is the jpeg version, http://www.torqaid.com/diagrams

[4] Outcomes here refers to Goal and Purpose

[5] See definitions of these in the appendix to this PDD

2. Project/Program Planning and Design

2.1. Overall Project/Program Objectives

The objectives (Goal, Purpose, Outputs) of the proposed intervention should be clearly stated here. The Goal and Purpose ideally should then also be re-written as Intended Outcome(s).

2.2. Summary of the Needs Analysis Process Undertaken

A description of the processes undertaken to identify the targeted community's strengths and challenges. This process might include a ranking process such as the Ten Seed Technique (TST). A range of possible solutions might also have been identified, this possibly fine-tuned by the development of a Logical Framework Approach (LFA)[6] Situation and Idealised Solution Tree. The range of vulnerable stakeholder groups will be brainstormed and recorded, and, again, fine-tuned according to the possible initiatives being undertaken. Finally, a summary will be included on how the key quantitative and qualitative baseline data has been collected.

2.3. Stakeholder Identification & Analysis

A description on the process by which all the key stakeholders, these including the targeted beneficiaries, have been identified. This could possibly include a summary of a Stakeholder Analysis, if this particular LFA process has also been carried out.

2.4. Overall Project/Program Description and Justification

A description of the proposed project or intervention in detail. This includes details of what needs to be done; why; when; and by whom ? This description can be complemented by reference to the Project Management Cycle (PMC)[7].

2.5. Risk Management

A description of the ISO 31000:2009 risk management process[8] which has been carried out. This includes the identified risks, and how will they be managed. It also covers the various initiatives which comprise the risk treatment/reduction process (ie prevention; mitigation; preparedness; transfer)

2.6. Principles, Standards, Codes of Conduct; and Cross-cutting Issues

A summary of the Principles[9], Standards and Codes of Conduct[10] which appertain to this proposed intervention. Ideally these include those rights-based and people-centred approaches which are increasingly used in development and humanitarian assistance, the key example of which is the Core Humanitarian Standard (CHS)[11] Cross-cutting issues

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[6] The traditional LFA process mentioned here includes Stakeholder Identification & Analysis; Development of a Situation Tree; Development of an Idealised Solution Tree; Selection of a Preferred Strategy or Intervention; and the Preparation of a LogFrame (LF) Matrix

[7] See the resources section of the Torqaid website www.torqaid.com/resources for latest PMC version

[8] This includes Understanding the Background Context; Risk Assessment (Identification/analysis/evaluation) and Risk Treatment.

[9] See the TorqAid Guiding Principles, Standards and Codes of Conduct as included in the resources section of the Torqaid wensite – www.torqaid.com/resources

[10] For Australian NGOs, these would include the various ACFID – www.acfid.asn.au Codes of Conduct – see https://acfid.asn.au/sites/site.acfid/files/resource_document/ACFID-Code-of-Conduct-vOCT14.pdf

[11] Note www.corehumanitarianstandard.org and www.chsalliance.org

should include youth; old age; child protection; disability inclusive development; gender equality and strategies to counter Gender Based Violence (GBV); and environmental management.

2.7. Effectiveness, Impact, Sustainability, and other Project Management Criteria.
This includes details on how the effectiveness of the project can be measured, and what is the likely longer-term impact on key stakeholders ? Issues relating to sustainability will be addressed, as well as other project management criteria to be considered include efficiency and relevance/appropriateness. For humanitarian initiatives, additional criteria such as coverage/sufficiency, connectedness/capacity building; and coherence may also need to be considered.

2.8. LogFrame (LF) Matrix
Ideally a LogFrame (LF) Matrix should be included here[12]. This summarises the objectives (Goal/Purpose/Outputs) of the proposed intervention; the Performance Indicators and Data Sources[13] used to measure these objectives; and assumptions relating to risk.

3. Project/Program Management and Implementation
3.1. Summary and Role of Key Stakeholders. Coordination Frameworks
This includes a summary of the key stakeholders, and what their role is with regards to the project or intervention implementation. It also includes the various coordination processes which are likely to be in place throughout the implementation stage.

3.2. Personnel Selection/Recruitment, Training & Capacity Building
This includes details of staff, volunteers, and possibly other stakeholder personnel, how they will be recruited and trained. Details of how this capacity building process contributes to improved outcomes should ideally be included. For humanitarian situations, extra input relating to psycho-social training and support should ideally be included.

3.3. Monitoring and Evaluation (M&E)
This summarises the Monitoring and Evaluation (M&E) processes, which are required to measure project results and success. These will include Monitoring; Reporting; Reviews (or in humanitarian parlance, Real Time Evaluations = RTEs), and Post-project Evaluations.

3.4. Work Schedule/Time Framework/Gantt Chart
This is a summary of a work schedule which details key Activities and Outputs throughout the Implementation Stage. If highly detailed, this can be included as an appendix.

4. Project/Program Budgeting and Funding
4.1. Key Financial Background Information
This includes an overview of the Project Budget being introduced; a summary of the Budget Approval process; the likely sources of Project Funding; and details of Non-Cash funding.

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[12] The LF matrix is also the fifth and final step of the LFA process
[13] Other definitions for these two terms include Key Performance Indicators (KPIs) or Objectively Verifiable Indicators (OVIS), and Means of Verification (MOV).

4.2. Project Detailed Budget

This section focuses in on the primary Project Budget which is used for planning, implementation, and organizational management purposes. It should include all anticipated expenses and revenue items, and include clarifying notes and explanations.

4.3. Donor Contributions and Cost-Sharing Arrangements

A summary of how the expenses will be shared between various potential financial donors

4.4. Other Financial Details to Note

Details of other funding and in-kind contributions not already covered in sections 4.1.-4.3.

Chris Piper
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APPENDIX A: SUMMARY OF PROJECT DESIGN DOCUMENT (PDD) TEMPLATE

Executive Summary

1. Project/Program Background Situation and Context
    1.1.   Overall Situation, and Intended Outcome of the Proposed Intervention
    1.2.   Understanding the Background Context
    1.3.   Project Management Agency Overview

2. Project/Program Planning and Design
    2.1.   Overall Project/Program Objectives[14]
    2.2.   Summary of the Needs Analysis Process Undertaken
    2.3.   Stakeholder Identification & Analysis
    2.4.   Overall Project/Program Description and Justification
    2.5.   Risk Management
    2.6.   Principles, Standards, Codes of Conduct; and Cross-cutting Issues
    2.7.   Effectiveness, Sustainability, Impact & other Project Management Criteria.
    2.8.   LogFrame (LF) Matrix

3. Project/Program Management and Implementation
    3.1.   Summary and Role of Key Stakeholders. Coordination Framework
    3.2.   Personnel Selection/Recruitment, Training & Capacity Building
    3.3.   Monitoring and Evaluation (M&E)
    3.4.   Work Schedule/Time Framework/Gantt Chart

4. Project/Program Budgeting and Funding
    4.1.   Key Financial Background Information
    4.2.   Project Detailed Budget
    4.3.   Donor Contributions and Cost-Sharing Arrangements
    4.4.   Other Financial Details to Note

Appendices

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[14] The term 'objectives' here means a combination of Goal, Purpose, and Outputs. The term 'Outcomes' is a combination of Purpose and Goal.

APPENDIX B: TORQAID PROJECT MANAGEMENT CYCLE (PMC)

THE PROJECT MANAGEMENT CYCLE   TORQAID

POST IMPLEMENTATION

Identification

IMPLEMENTATION

PLANNING

Preparation & Design

Appraisal & Funding

Key to the Project Management Cycle

PLANNING STAGE

IDENTIFICATION
A. Relationship Building/Community Interaction
B1. Understanding the Background Context
B2. Needs Analysis, Strengths, Challenges
C. Identifying/Analysing Key Stakeholders
D. Collecting Baseline Data/Setting Objectives
E. Identifying Possible Solutions
F. Identifying Potential Sources of Funding
G. Feasibility Studies (if required)
H. Commencing Risk Management Process

PREPARATION & DESIGN
I. Preparing Initial Documentation
J. Assessment of Initial Documentation
K. Modifying the Project Documentation
L. Preparing a Project Design Document (PDD)

APPRAISAL & FUNDING
M. Appraising the PDD
N. Final Project Documentation
O. Preparing a Funding Proposal

IMPLEMENTATION STAGE

Ongoing Monitoring, Reflection, Management & Administration

A. Relationship Building / Community Interaction
P. Reviewing Project Documentation
Q. Final Project Reports

○ Regular Reports
● Reviews
- - -▶ Learning and Sharing Lessons

POST IMPLEMENTATION STAGE

A. Relationship Building / Community Interaction
△ Post Project Evaluation
······▶ Learning and Sharing Lessons
- - -▶ Field Visits

M&E (Monitoring & Evaluation) includes Monitoring, Reports, Reviews, Evaluation
MEAL (Monitoring, Evaluation, Accountability, Learning) includes Monitoring, Reports, Reviews, Evaluation, Accountability & Learning Lessons