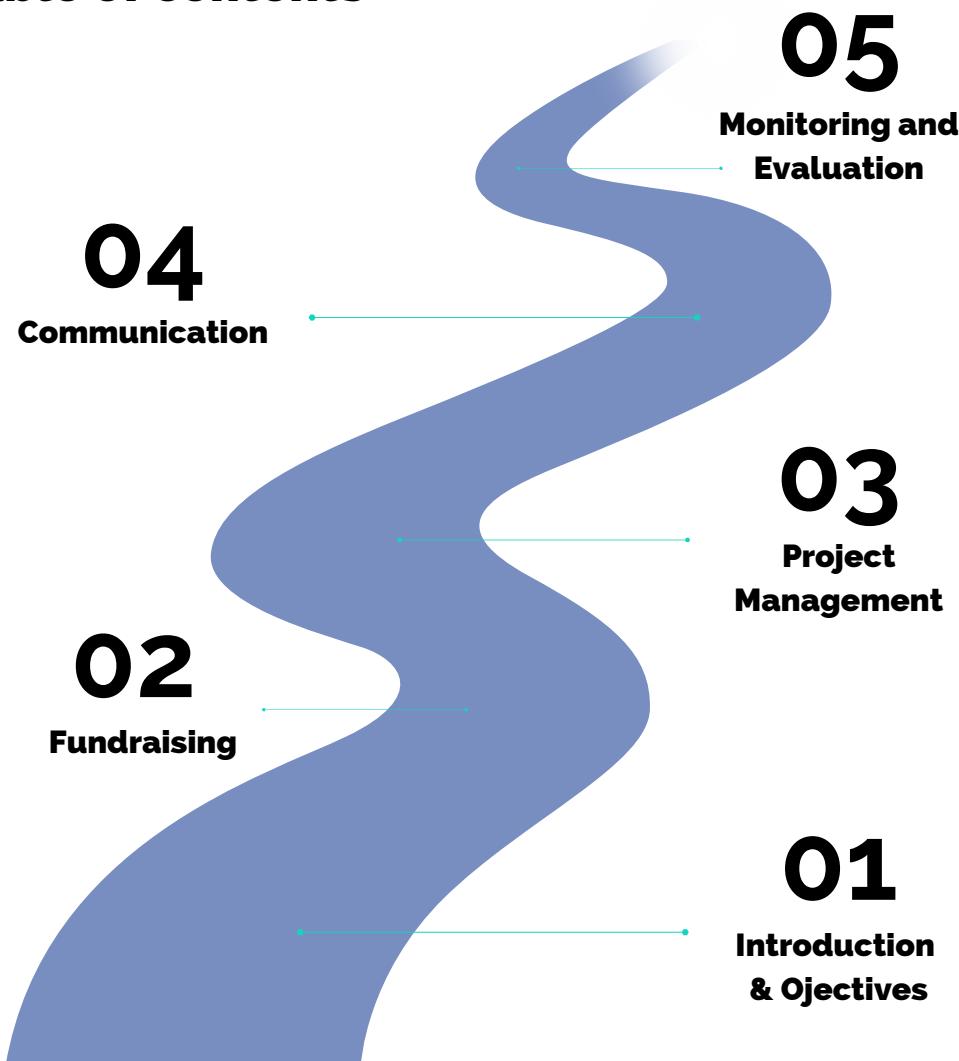# Sustainable practices for small and medium NGOs

A guide by Open Cultural Center

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About this guide

This guide has been developed under the framework of the European project 'Training Without Borders' (TWB), developed between Open Cultural Center Spain and Open Cultural Center Greece.

Implemented between December 2021 and November 2023, TWB is dedicated to improving cooperation between the two teams while learning from each other.

This Environmental Sustainability Plan was developed under the framework of the project Training Without Borders 2021-1-ES02-KA153-YOU-000011906. This project has been co-funded by the European Union.

Co-funded by the European Union

About the author organisation

Open Cultural Center (OCC) is a registered non-profit organisation active in both Spain and Greece, working towards the inclusion of migrant and refugee people through educational and cultural activities. It works mainly with volunteers to offer language classes, technical workshops, sports activities, cultural events, and women and children's support to the wide variety of communities it works with.

At the same time, we work on an international level to create awareness about the situation of refugees while working with many European partners to increase our social impact.

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Introduction

Non-Governmental Organizations often find their roots in ad hoc responses to identified social issues. Frequently initiated by volunteers, these organizations materialize as a direct solution to urgent problems. This is exactly how the Open Cultural Center (OCC) was created in 2016, when a group of volunteers traveled to Greece in order to offer first-response support to the large number of refugee people arriving at the Greek border. From a group of young volunteers, the initiative has been developing for the past 8 years, into a professional and experienced NGO, that has grown to develop four programs in two countries.

Through its growth journey, Open Cultural Center, as many other grassroot organizations, has faced challenges such as financial constraints, ever-changing conditions and needs, hostile environments, that have put the continuity of its programs at risk. In this reality, sustainability comes as a key aspect in the development of an NGO. Sustainability for an organization is defined as the capacity to maintain its activities and fulfill its mission for a prolonged period of time.

For small and medium-scale NGOs like OCC, the path towards sustainability encompasses organizational resilience, community impact, and long-term viability. This guide serves as a tool for the dissemination of insights, strategies, and learnings, to empower NGOs facing similar challenges. By addressing critical facets of sustainability, it aims to equip NGOs not only to navigate challenges but also to anticipate, plan strategically and contribute substantially to their respective communities.

This guide is based on the cumulative experience amassed by OCC during its developmental trajectory, and more specifically emerges from the exchanges and training periods conducted thanks to the "Training Without Borders" project, funded by the European Union. The guide proceeds to introduce the foundational pillars to the sustainability of an non-profit organization, organized in the following four chapters:

1 **Fundraising**: the central concept of funding diversification, with an insight on public funding, corporate fundraising, and strategies for engaging individual donors.

2 **Project Management**: a comprehensive overview of effective project planning, implementation, and suggested tools to the project lifecycle.

3 **Communications**: the strategic aspects of setting realistic goals, engaging followers, and utilizing appropriate channels, emphasizing constructive and solution-based communication.

4 **Monitoring & Evaluation**: the ongoing assessment of project impact and success.

The objective of his guide is to share the narrative of OCC's evolution, drawn from practical experiences and collaboration during the "Training Without Borders" project, in order to provide advice and guidance to similar initiatives and organizations. The intention is to provide NGOs with actionable insights, enabling them not only to overcome challenges but to cultivate sustained growth and meaningful impact within their communities. In order to provide accessible and actionable insights, readers will be able to find a "Key takeaways" section at the end of each chapter.

Fundraising

The central concept of funding diversification, with an insight on public funding, corporate fundraising, and strategies for engaging individual donors.

Introduction: The importance of setting a fundraising strategy for NGOs

Small nonprofits are vital contributors to positive change in their communities, but their impact is often tied to effective fundraising. Fundraising is more than financial management; it propels NGOs toward their missions, influencing every aspect of their operations.

To begin a successful fundraising journey, small NGOs must conduct a thorough self-assessment. This involves evaluating immediate needs and establishing clear fundraising goals for long-term success.

A compelling mission statement is central to this strategic approach, serving as a guide for potential donors and linking the organization's objectives with reasons for support. An effective online and offline presence, including a professional website and active social media profiles, is crucial for storytelling and engaging with potential donors.

Diversification is key for small NGOs seeking financial stability. Relying on various funding streams—individual donations, grants, corporate sponsorships, and fundraising events—acts as a safety net against uncertainties associated with depending on a single funding source.

In the upcoming sections, we delve into specific fundraising strategies, focusing on public grants, corporate fundraising, and individual donations. The chapter concludes with key takeaways and a summary of crucial aspects to consider when developing a fundraising strategy for small NGOs.

Public funding - Grants

In the landscape of financial support for NGOs, public funding through grants stands out as one of the main avenues for organizations seeking to advance their missions. Grants, often provided by government agencies, foundations, or other public entities, serve as a significant resource for nonprofit initiatives.

Understanding Grants

Grants are essentially financial contributions given to organizations for specific projects or programs. Unlike loans, grants do not need to be repaid, making them a desirable form of funding for NGOs with specific goals and objectives.

Grants have various types and scope. When starting a fundraising strategy, it is crucial to review the NGO's projects and goals, as well as the local, national and European opportunities. Try to start small, and gradually increase your proposals' scope and number.

Grants can come from various sources, including government departments, private foundations, and international organizations. Each grantor may have different criteria, application processes, and requirements, so it's crucial for NGOs to identify grants that align with their mission and their capacities.

Types of Grants

Grants come in various types, each serving specific purposes and target audiences. Project-Based Grants allocate funding for specific initiatives with clear objectives, while General Operating Grants offer unrestricted support for day-to-day NGO operations. Capacity Building Grants focus on training and skill development to enhance organizational capabilities. Research Grants support scientific or academic projects, contributing to knowledge advancement. Equipment Grants fund the acquisition of specific tools, enhancing operational capacity. Volunteering Grants facilitate training and implementation of volunteer activities, increasing human resources for social programs. In-Kind Grants provide non-monetary support, such as goods or services, fulfilling specific needs without direct financial assistance.

Understanding the different types of grants allows NGOs to strategically pursue funding opportunities that align with their goals and operational requirements. Depending on the area of work of each organization, one type of grant can be more suitable than others. Moreover, it's essential to tailor grant applications to the specific criteria of each grant type and source.

Navigating the Grant Application Process

Successfully securing a grant requires a strategic and organized approach. NGOs must meticulously navigate the grant application process, starting with a thorough review of the eligibility criteria and guidelines provided by the grantor. This involves gaining a clear understanding of the grant's objectives, target audience, and expected outcomes.

- Internal Research and Idea Generation

Following the initial review, NGOs should conduct an internal research to identify projects that align best with the grant requirements. Engaging the team in brainstorming sessions fosters the generation of new ideas and opportunities. It's crucial to ensure that these ideas align with the organization's strategic plan for the upcoming years.

- Documentation Preparation and Organization

After identifying a suitable project, download all relevant information provided by the grantor (call guidelines, templates for the application, manuals, etc.). Establishing a well-maintained repository with essential documentation is key. This repository should include key documents regularly updated and readily available.

- Project Conceptualization

Begin by defining the concept of the proposed project. Clearly outline objectives, expected results, and key performance indicators. This foundational step provides a comprehensive understanding of the project's scope and impact. You can use different methodologies for this process, such as a Theory of Change.

- Budget Development

Create an adjusted budget aligned with the project's goals. Take note of important considerations, such as the maximum budget allowed and the funding rate. It's essential to assess whether co-funding is required. Pay close attention to the justification requirements, ensuring that the budget aligns with the grantor's expectations.

A well-crafted grant application not only aligns with the grantor's objectives but also showcases the organization's dedication to strategic planning and effective resource utilization. By following this systematic approach, NGOs enhance their chances of securing the funding necessary to bring their impactful projects to fruition.

Key Questions of Grant Applications

Although each grant application is different, there are some general questions that you should always keep in mind when drafting your proposal:

- **Title of the project**
- **General description of the project:** What is the project about?
- **Target group:** Who is the project designed for? How many people and what are their profiles in terms of gender, origin, age, status, etc.?
- **Justification of the need for this project:** Why do we do this project? What is the social context around it? What are the specific social issues we are trying to give an answer/solution to?
- **Objectives of the project:** Usually divided between General Objectives (what we want to achieve) and Specific Objectives (stepping stones for each General Objective)
- **Calendar or timeline:** When will the project be carried out? How long will it take in general? And each activity? When will the preparation activities take place? When will the monitoring and evaluation activities take place?
- **Monitoring and evaluation:** What techniques will you follow to make sure the project is making good progress? Who will carry them out? How will you report them?
- **Expected results:** Will there be any products coming out of this project (like a book, a video etc.)? Will there be non-material results (like a number or percentage of people finding a job)?
- **Impact:** How will these results affect the social context and needs described above?
- **Necessary resources:** What will be needed in order to do the project (a building, a venue, materials like computers or books, human resources, insurance, etc.).

Managing a Grants Database for Effective Follow-Up

Maintaining a well-organized grants database is crucial for efficient tracking and follow-up. The choice of the database platform, such as Airtable, Notion, or Google Drive, depends on the organization's needs and the scale of its grant activities.

Regardless of the platform, creating a comprehensive folder structure ensures a systematic approach. Consider the following categories:

- 0. In Review: Grants under consideration.
- 1. In Progress: Grants are actively being worked on.
- 2. Submitted: Grants that have been formally submitted.
- 3. Approved: Grants that have received approval.
- 4. Rejected: Grants that were not accepted.
- 5. Archived: Grants that weren't submitted but that can offer insights.

Regularly update the status of each grant in the database. Move grants to the appropriate folders as their status changes. For instance, move a grant from "In Progress" to "Submitted" upon formal submission.

Communication is vital. Keep the project management team informed about changes in grant status. This ensures that everyone is aware of the progress and can align their efforts accordingly.

Staying Informed about Grant Opportunities

Remaining informed about grant opportunities is vital for NGOs seeking financial support. To stay informed about local grants and tenders, subscribe to newsletters of organizations operating within the NGO sector. Quick research can help identify newsletters that cater to local needs. These newsletters often provide timely updates on new opportunities, application guidelines, and relevant news within the local community.

For Erasmus+ opportunities, regularly check the "Opportunities" page of the dedicated EU portal. It's important to note that opportunities typically open twice a year, with Round 1 occurring around February-March and Round 2 around October-November. Monitoring these specific timelines ensures that NGOs are well-prepared to apply during the application periods.

Explore the Funding & Tenders portal of the European Commission for a comprehensive overview of various European opportunities. This portal serves as a valuable resource, offering information on a wide range of funding opportunities, calls for proposals, and tenders. Regularly checking this portal ensures that you stay aware of diverse funding options beyond Erasmus+.

Regularly monitor dedicated portals for local, regional, and national grants and calls in your area.

Challenges and Opportunities

While grants offer valuable financial support, the competitive nature of grant applications poses challenges. NGOs should be prepared for a rigorous selection process. However, successful grant acquisition not only provides financial resources but also opens doors to networking opportunities and potential collaborations.

Public funding through grants is a dynamic and accessible resource for NGOs committed to creating positive change. By understanding the nuances of the grant application process, tailoring proposals to meet grantor expectations, and building strong relationships, NGOs can harness the power of grants to advance their missions and make a lasting impact.

Corporate fundraising

Understanding Corporate Fundraising

Corporate Fundraising is a highly promising and much-needed approach to securing funding for nonprofit organizations, and can also be a great way to utilize other resources that small to large companies could offer to the nonprofit sector. Nonprofit organizations participate in this initiative to obtain financial support and collaboration from businesses. Unlike individual donations or grants from foundations, corporate fundraising involves building partnerships with private companies to secure financial contributions, in-kind donations, sponsorships, or other forms of support.

While it often used to be a one-directional support channel, where companies were simply providing economic means to a social impact project - new CSR approaches have become much more comprehensive and based on reciprocity of both partners involved. In other words: a company can do much more than just provide financial support, and the company itself can also greatly benefit from their Corporate Fundraising involvement.

Key Aspects of Corporate Fundraising

- Corporate fundraising emphasizes the establishment of mutually beneficial partnerships between nonprofits and businesses.
- Businesses may contribute funds to support specific projects, programs, or the overall mission of the nonprofit.
- Corporations may provide non-monetary (in-kind) support in the form of goods, services, or expertise.
- Nonprofits often seek corporate sponsorships for events, initiatives, or campaigns, with businesses receiving visibility and recognition in return.
- Corporate fundraising may involve engaging employees through workplace giving programs, volunteer opportunities, or employee-driven fundraising campaigns.
- Successful corporate fundraising often hinges on aligning the nonprofit's mission and values with the corporate social responsibility goals of the partnering businesses.

Strategies for Successful Corporate Fundraising

Corporate fundraising involves strategic approaches to engage and secure support from businesses. Here are key strategies for success:

- Conduct thorough research to identify businesses aligned with your mission. Tailor your approach based on the specific interests and values of potential corporate partners.
- Craft a compelling proposal that clearly communicates the impact of your organization and how corporate support can contribute to shared goals. Highlight tangible benefits for the business, such as positive public relations, brand visibility, or employee engagement opportunities.

- Establish and nurture relationships with corporate decision-makers. Attend networking events, engage in direct outreach, and utilize existing connections within your organization to foster meaningful relationships.
- Offer customized engagement opportunities based on the preferences and capacities of each corporate partner. This could include tailored sponsorship packages, employee volunteer programs, or cause-related marketing initiatives.
- Regularly communicate the impact of corporate support, showcasing how their contributions have made a difference in achieving your organization's goals. This builds trust and encourages ongoing support.

Best Practices for Corporate Fundraising

Implementing best practices enhances the effectiveness of corporate fundraising efforts:

- Maintain transparency in financial dealings and the use of corporate contributions. Clearly communicate how funds will be utilized.
- Provide visible recognition to corporate partners through various channels, such as websites, social media, and events. Acknowledge their impact on your organization.
- Focus on building long-term relationships rather than one-off transactions. This approach fosters trust and increases the likelihood of continued support.

Challenges and Opportunities

Corporate fundraising offers unique opportunities for NGOs that set it apart from other funding sources like public grants. One key advantage lies in the ability to diversify funding streams, reducing dependence on a single source. Beyond financial support, corporate partnerships enhance visibility, bringing increased awareness and support for the NGO's mission. The collaboration also opens avenues for innovation and expertise, as businesses may contribute specialized knowledge to amplify the impact of nonprofit initiatives. Networking opportunities further enrich the landscape, fostering connections with potential supporters and collaborators.

However, navigating corporate fundraising comes with challenges. The competitive landscape requires NGOs to articulate their unique value very clearly. Managing expectations and clearly defining deliverables from both parties is crucial to prevent misunderstandings in the relationship. The process of building partnerships with companies can be very time-consuming and quite long, and sometimes it may take months or years. Lastly, many companies only donate once to any specific organisation, so managing expectations is key.

In conclusion, corporate fundraising stands as a dynamic avenue for NGOs to secure financial support and foster meaningful collaborations with businesses. As NGOs navigate the landscape of corporate fundraising, the key lies in developing tailored strategies for engagement, demonstrating clear impact, and maintaining transparency in relationships. By doing so, nonprofits can unlock the full potential of corporate partnerships, contributing to the sustainability and success of their missions. In the next section, we will delve into another crucial aspect of fundraising—individual donations—and explore effective strategies for engaging and mobilizing individual supporters.

Individual Donors - Strategies for Engagement

Individual donors are the backbone of nonprofit funding, providing crucial support for a diverse range of initiatives. This chapter explores various strategies for engaging individual donors, including leveraging social media campaigns, building membership programs, and tapping into other creative avenues.

Social Media Campaigns for Individual Donors

In the digital age, social media platforms serve as powerful tools for connecting with potential donors. Crafting compelling and shareable content, utilizing targeted advertising, and actively engaging with the audience can significantly amplify the impact of social media campaigns.

Crafting a Compelling Storytelling Strategy for Social Media Campaigns

In the realm of social media campaigns, storytelling is a potent tool that goes beyond conveying information—it creates emotional connections. Crafting compelling narratives draws in your audience, fostering empathy and inspiring action. Here are some examples of how to create a storytelling strategy that resonates and drives individual donor engagement:

- Incorporate data to showcase tangible impact. Numbers and statistics add credibility and help donors understand the real-world difference their contributions make.
- Feature testimonials and personal stories from beneficiaries or individuals directly impacted by your organization's work. These stories create relatability and humanize your cause.
- Enhance your narrative with visual content. Use high-quality images, videos, and infographics to captivate your audience.
- Make sure to maintain a consistent narrative across different platforms. Whether it's a blog post, social media post, or video, the story should align with your organization's mission and values.
- Include a clear and compelling call to action (CTA) in your posts. Guide your audience on how they can contribute to the story, making them active participants in your cause.
- Authenticity builds trust. Share genuine stories that reflect the reality of your organization's work, including both successes and challenges.

Crafting a compelling storytelling strategy involves weaving together narratives that engage, inform, and inspire. By combining data-driven insights, personal testimonials, captivating visuals, and a consistent narrative, your social media campaigns can become powerful vehicles for connecting with individual donors and mobilizing support for your organization's mission.

Real-Time Engagement Strategies for Individual Donors

Real-time engagement is a dynamic approach to connecting with individual donors, fostering immediacy, and building a sense of involvement. Here are some examples of how to effectively leverage real-time engagement strategies:

- Conduct live sessions to provide a direct and unfiltered connection with your audience, such as live Q&A sessions, behind-the-scenes glimpses, or updates on ongoing projects. This real-time interaction creates a personal connection, allowing donors to feel directly involved in your organization's activities.
- Facilitate direct communication and address questions or concerns from individual donors through Q&A sessions. You can schedule regular sessions where donors can submit questions in advance or ask in real-time. This transparent communication builds trust, and donors gain insights into your organization's operations and impact.

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- Create interactive polls and surveys through which you can gather feedback and preferences from donors in real-time. Involving donors in decision-making processes enhances their sense of contribution and investment in the organization's direction.
- Use live sessions or personalized messages to thank donors immediately after their contributions. This immediate acknowledgement reinforces the impact of their contributions, and serves to create a more personal and meaningful connection.

Incorporating real-time engagement strategies not only keeps individual donors actively involved but also enhances the transparency and trustworthiness of your organization. By fostering a sense of immediacy, you create a dynamic and interactive relationship with donors, making them integral partners.

Membership Programs as a Sustainable Model

Creating Exclusive Member Benefits

Creating exclusive benefits is pivotal in encouraging long-term commitment within membership programs. These perks not only acknowledge individual donors' support but also cultivate a sense of belonging to a special community. Examples of exclusive benefits include:

- Early Access to Events: Granting members priority registration, reserved seating, or exclusive event previews creates a sense of privilege, making members feel valued and appreciated.

- Specialized Content Access: Offering members exclusive content, such as newsletters, reports, or behind-the-scenes insights, fosters a deeper connection with the organization's mission, providing unique value.

- Member-Only Updates: Providing exclusive updates about the organization's latest developments strengthens the sense of community, keeping members informed and engaged in ongoing initiatives.

- Personalized Recognition: Including personalized thank-you messages, shoutouts, or acknowledgments in communications adds a human touch. This recognition helps members feel individually appreciated and fosters a more personalized connection with the organization.

Tiered Membership Levels

Another option when implementing a membership program is to include tiered membership levels. This strategy allows more flexibility, depending on the capacities that supporters have to contribute economically to the organization. This approach fosters a sense of community where each member, regardless of their level, feels valued. Here's how to structure tiered membership levels effectively:

- Basic Membership: Entry-level membership offering fundamental benefits, such as standard access to events, general content, and regular updates. It appeals to a broad audience with a general interest in supporting the cause.
- Premium Membership: Mid-level membership offering additional perks, such as enhanced access to events, exclusive content, and priority communication. It appeals to donors seeking a more engaged and exclusive experience.
- VIP Membership: Top-tier membership with the highest level of benefits, such as all-access privileges, personalized interactions, and exclusive opportunities. It appeals to high-capacity donors or those deeply committed to the organization.

Make sure that you customize the distinct benefits to each tier, to align with the preferences and interests of the members and of your organization.

Personalized Communication Channels

Establishing personalized communication channels for members is a key element of a membership program, as it creates a more personal connection that goes beyond generic updates. There are many different ways of implementing this strategy, some effective examples include:

- Creation of newsletters specifically for members, highlighting the impact that their donations have made in the organization.
- Inclusion of personalized thank-you messages in acknowledgement emails, letters, or social media shoutouts.
- Establishment of direct lines of communication, such as personalized emails or virtual events, to engage with members.
- Collection of feedback and preferences through surveys, ensuring that the communication aligns with members' expectations.

Crafting a membership program with exclusive benefits, tiered levels, and personalized communication channels can transform individual donors into an engaged and committed community. By tailoring experiences to meet the diverse needs of members, organizations can build lasting connections that go beyond traditional fundraising interactions.

Exploring Other Avenues for Individual Donor Engagement

In the dynamic landscape of individual donor engagement, organizations can explore innovative avenues to deepen connections and expand their reach. Creative fundraising events both in the digital realm and within local communities, present opportunities for donors to contribute while partaking in memorable experiences. Whether through virtual galas or community initiatives, these events create engaging touchpoints for individual donors.

Another impactful strategy is peer-to-peer fundraising, empowering individual donors to become advocates for the cause. Encouraging supporters to initiate their fundraising campaigns leverages personal networks, transforming donors into active contributors and amplifiers of the organization's message.

Furthermore, fostering long-term commitments from individual donors can be achieved through legacy giving and planned giving options. By introducing avenues such as bequests and charitable gift annuities, organizations can align with donors' financial goals, establishing a framework for sustained support.

Challenges and Opportunities in Individual Donor Engagement

In the realm of individual donor engagement, there are significant opportunities that can be harnessed to strengthen nonprofit organizations. By cultivating engaged individual donors, organizations have the chance to construct a supportive community rooted in a shared commitment to the cause. This community becomes a powerful ally in amplifying the impact of fundraising efforts, creating a network of individuals passionate about driving positive change. Furthermore, the engagement of individual donors presents a unique opportunity to empower them as advocates for the organization. Providing donors with the necessary tools and platforms to share their personal experiences and enthusiasm can extend the reach of the organization's message, transforming donors into influential voices that contribute to the broader narrative.

However, amid these opportunities, challenges persist in the landscape of individual donor engagement. The longevity of donor retention poses a considerable challenge, requiring ongoing efforts to sustain interest and connection. Additionally, in a crowded digital space, nonprofits grapple with the competition for donors' attention, necessitating strategic approaches to stand out effectively. Balancing these challenges with the identified opportunities becomes pivotal for nonprofits seeking to build lasting connections and harness the advocacy potential of engaged individual donors.

Main takeaways from this chapter

- Start by analizing your projects and brainstorm new ideas. Then, analyze your local funding landscape to see which of the available options best fit your programs.
- Set up fundraising objectives yearly, and a detailed strategy on how to reach them.
- Establish a clear database with all your funding information (grants, proposals, donations, etc.)
- Try to diversify your funding streams, try different initiatives so that you can have more options.
- When writing a grant, read carefully the guidelines of the call and adapt your language, objectives and project to it.
- For Corporate fundraising, make sure to research current trends and CSR priorities, and adapt your proposals accordingly.
- In the case of donations, don't hesitate to implement new and innovative strategies through different digital platforms, such as live streams, Q&A sessions, and more.
- Cultivating relationships with companies takes time; make sure to start small and create a plan for 2-3 years.
- Start small and gradually increase the number and scope of your proposals.
- Take time weekly to research new funding opportunities and stay aware of new fundraising trends!

Project Management

A comprehensive overview of effective project planning, implementation, and suggested tools to the project lifecycle.
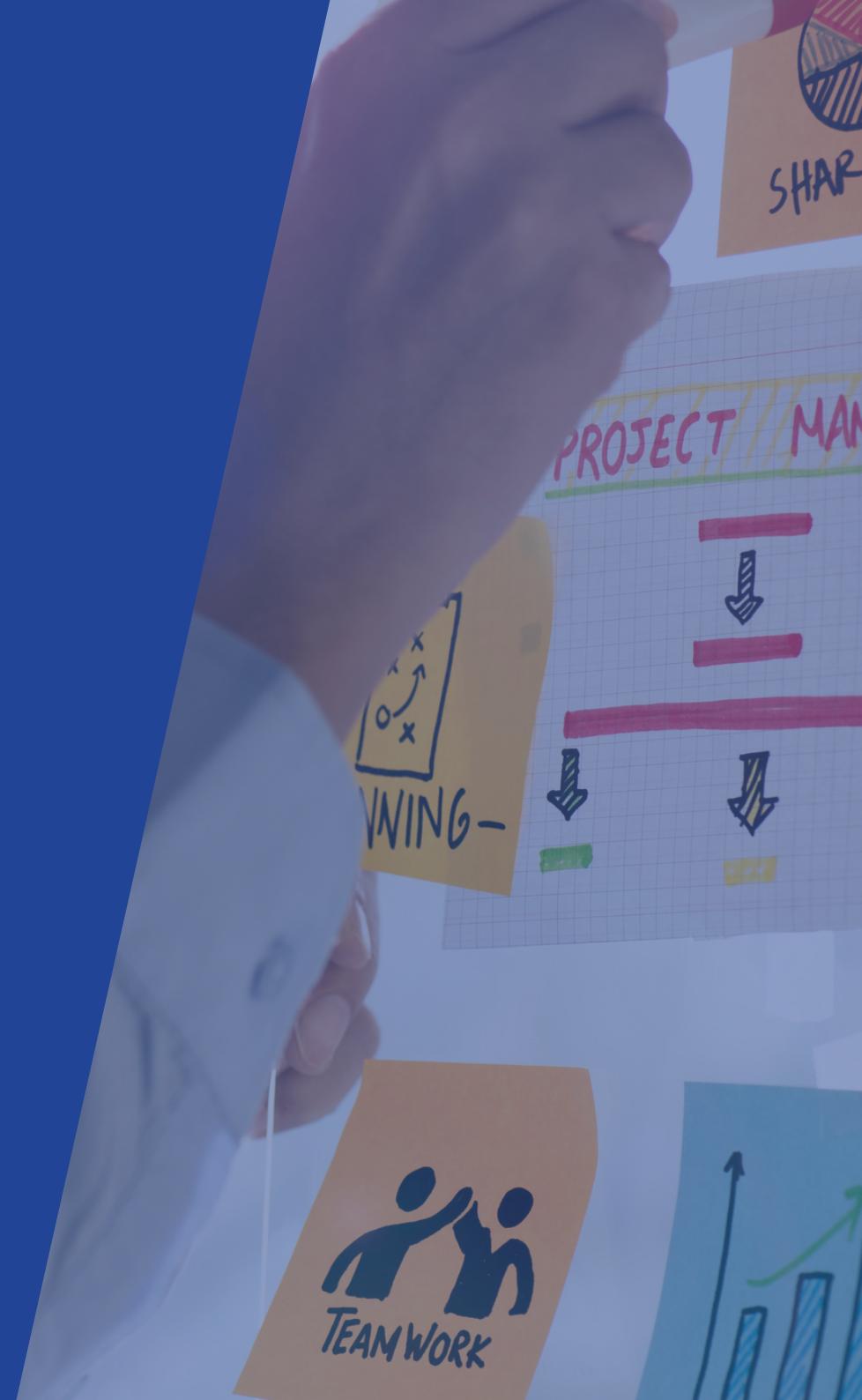
Project management is about applying knowledge, skills, tools, and techniques to meet project requirements and achieve the intended outcome. Being able to manage a project successfully is very important for small organizations as it helps ensure that the project results are achieved and that this happens within the planned schedule and budget. A standardized way of doing this is by following the project life cycle, which represents the series of phases or stages that a project progresses through from initiation to completion. Understanding it is essential for project managers as it provides a structured framework to manage each phase efficiently. In this chapter, we will follow the stages of the project cycle and give you tips and tools that we use in OCC.

Project Initiation and Planning

The initiation phase is when you start defining your project and what you want to achieve with it. In OCC these phases are usually carried out by both the project managers and the fundraising team.

 When designing a project it is essential to carry out different assessments of the context and needs within the communities or environments targeted by the project. In this way, you can have a clear vision of what the objectives and goals of the project should be ensuring that it aligns with the organization's mission and the needs of the community it serves. Taking the time to assess the context also helps secure the long-term sustainability of the project as it will allow you to think of strategies that will continue to have a positive impact after the project ends.

Once you have assessed the context and needs you can start defining the overarching goal and objectives of your project. This is essential for ensuring focus, efficiency, relevance, and accountability throughout the project lifecycle. Likewise, having well-defined objectives and goals allows for the establishment of measurable outcomes. This will make it easier to track progress, evaluate achievements, and demonstrate the impact of the project. Goals and objectives are the foundation for effective planning, implementation, and evaluation of the project's impact.

Tip! Use SMART (Specific, Measurable, Achievable, Realistic & Time-bound) objectives to be sure of their feasibility. It will also help you later on to create a monitoring and evaluation plan.

After having a better idea of the project overview you can break down these objectives into smaller, manageable components called deliverables. Deliverables are tangible and measurable outcomes that contribute to achieving the overarching project objectives. They represent the concrete results or products that the project aims to produce. Each deliverable should be specific and well-defined outlining exactly what needs to be done. For example, if the objective is to "improve migrants' access to healthcare," a deliverable could be "conduct a health needs assessment," "organize intercultural training for health workers," or "establish a mobile clinic schedule."

Although we are not going to go into methodologies in this guide, it is worth pointing out that this is the phase where you may also choose the methodology that your project will follow. There are a lot of methodologies you can choose from, you can read about some here. Depending on the nature of your project a methodology will be more suitable than another.

Tip! Use the waterfall management strategy for projects that are more conventional as it offers a detailed, sequential approach. For complex projects, use the agile methodology with iterations to divide big tasks into short sprints.

Now that you have a clearer view of the project it is time to gather the resources needed for it. Assembling the right team with defined roles and responsibilities is key to project success as it brings clarity and accountability. To do this you first have to determine the expertise and skills needed from team members. You might also want to consider the technology tools, or physical resources required. Once you have gathered the team and the technological and physical resources, it's time to estimate how much money you need to carry out the project in total and establish financial controls to manage expenses effectively. We will address the budget more in detail in the planning phase.

Tool: Notion
Notion is a productivity and note-taking web application that has many functionalities, but within OCC, we mainly use it as a knowledge database application, where we save procedures, protocols, general information, and any other relevant information. The most relevant feature for the initiation phase of project management is that it allows you to have all the basic information for your projects stored and organized in the same space. In OCC we always add this data:

- Project name and code
- Start and ending date
- Main funding received
- Project Manager
- Project summary i.e., aim, objectives, deliverables.
- Key documents i.e., project proposal, Google Drive folders...
- Stakeholder's contact details
- Gantt charts
- Workflows

You can add anything that you deem relevant to know for someone who just joined the project. In this way, you will have the main key information needed to know about the project and how to run it in a centralized database.

Planning

The planning phase involves a broad set of actions and strategies to ensure that the project progresses efficiently from start to finish. One of these key actions is to develop a **timeline** to guide the project from start to finish. This means creating a structured schedule that outlines milestones, deadlines, and the sequence of tasks. In the schedule, there should be a detailed list of all tasks to have an overall view and understand the dependencies between them and subsequently set realistic timelines for each phase of the project.

Tool: Gantt Chart
In OCC we tend to use Gantt charts to better visualize our project schedules. We find them useful for several reasons:

- They help set realistic timelines by visually showing task durations and their overlaps.
- They give project managers the ability to allocate resources effectively and adjust schedules as needed to ensure that deadlines are met without sacrificing quality.
- They facilitate communication and collaboration between team members. By looking at a Gantt chart, everyone involved can easily understand their roles, dependencies, and how their tasks contribute to the overall project schedule.
- They are dynamic tools that can be modified throughout the project lifecycle, especially when delays occur. In this way, it can always provide an updated roadmap for the project.

Another essential part of project planning is the creation of a budget. Creating a detailed budget helps in allocating resources efficiently, ensuring financial viability throughout the project's lifecycle. To do this you would assess all the financial resources required for each part of the project, including costs for materials, staff, equipment, and any other relevant expenses. In OCC, we create spreadsheets to visualize the distribution of money towards the different components of the project. Although this depends on the characteristics of each project, we usually have a spreadsheet with a detailed budget for each activity and another more general one for the budget allocated to each project phase.

Tip! When implementing the project, always keep a copy of the receipt and the ticket to keep track of your expenses and be able to justify them later on (especially when they are funded by a public grant, but also for internal accountability and transparency).

To be able to execute a project it is fundamental that you establish clear and effective communication within the team and with all the stakeholders involved. Communication channels, frequency, and tools (like software, meetings, emails, etc.) should be defined to ensure a smooth flow of information.

Tool: Slack
Within OCC we always use Slack, a simple communication tool for private and group messaging, for internal communication. It allows you to set up team workspaces to ensure efficient and easy communication. Within these workspaces, you can create dedicated spaces called channels involving specific people and information, as well as private messages to anyone in your organization. Additionally, you can configure workflows to automate different processes. We mostly use it to automate messages such as reminders of our class activities in specific class channels, to fill the meeting minutes documents, to fill financial documents, and more.

Lastly, during the planning phase, it is also important to think about the potential risks, challenges, and changes that might occur and plan what to do when those happen. You need to prepare for things that might go wrong. This includes thinking about delays in the schedule, having enough money for unexpected expenses, making sure everything meets a certain quality, and having the necessary things to get the job done.

Key questions to ask yourself during the initiation and planning phases:
- What is the project's goal and purpose? Are the goals measurable?
- Who are the potential stakeholders?
- How will we communicate?
- When shall we conclude this project?
- What resources and abilities will the project need?
- What is the project's estimated cost?
- What risks do we foresee? How can we mitigate them?

Implementation and Execution

The implementation and execution phase is the longest one of the project cycle since it is where the planned project takes shape. It involves putting plans into action, managing teams, monitoring progress, and adapting to changes. There are several key aspects involved in this phase all of which will be supervised by the project manager.

first step is for the project manager to look back at the previously defined project tasks and delegate them among the team members. To be as effective as possible, the responsibilities will be assigned based on individual strengths and skills. While the project team has the job of completing their tasks, the project manager should guide, support, and motivate team members to ensure they understand their roles, responsibilities, and expected outcomes and create a good working environment.

Once everyone is working on their tasks, it's time to monitor and track progress against predefined milestones and objectives. This entails evaluating the completion of tasks, ensuring quality standards, and maintaining alignment with the project schedule. At this stage, it is useful to have frequent check-ins and status update team meetings.

Tool: Trello
Trello is a tool that can be used for simple individual task management, but also for more advanced project management with multiple people and partners involved. In OCC we use it to track progress with activities and to have a general overview of where we are at in the project in relation to the Gantt chart. Everyone in the team can comment or allocate tasks to each other. We keep it updated with labels and usually review it during certain meetings. Moreover, you can also share it with the stakeholders to ensure full transparency.

The project manager should also remove obstacles that can hinder the project's progress. This includes but is not limited to resolving conflicts, providing necessary resources, and addressing technical issues. However, despite careful planning, changes and adaptations are inevitable. As a project manager, being proactive in identifying necessary changes is crucial. When this happens there should be an adaptation of schedules, budgets, and resource allocations. It is important to ensure that the entire team understands the reasons behind these changes.

Clear communication with the team is vital to make sure everyone is on board with the adjustments and understands their revised roles and tasks. Likewise, all stakeholders should be regularly updated on the project's progress. Warning them about potential delays or changes is essential to manage expectations and maintain transparency.

Tool: Google Drive
Google Drive is a cloud-based file storage and collaboration platform. In OCC we use it to organize, share, and collaborate on project-related documents and tasks. One of the primary benefits of using Google Drive for project management is its centralized file storage system. Moreover, it allows for real-time collaboration, allowing team members to simultaneously work on documents, make edits, and leave comments or suggestions. We recommend categorizing documents or folders by project phase, department, or specific activities, as it makes it easier to locate and access relevant information when needed.

Key questions to ask yourself during the implementation and execution phase:
- What tasks or deliverables make up each objective?
- What can you do to remove obstacles that might slow down tasks or prevent the team from completing them?
- How can you help the team stay on top of the schedule and expected results?
- What actions are taken to find solutions to process weaknesses and determine if the team needs additional training to achieve project objectives?
- How are changes to the project managed and adapted as they arise?
- How can you keep stakeholders updated?

Evaluation and Closure

A project's evaluation entails a comprehensive analysis of its accomplishments, to determine whether the project has achieved its intended goals. Here, you should compare the actual outcomes, deliverables, and results achieved during the project with the initial set of objectives. In this way, you will see if your project met its objectives, exceeded them, or fell short. It is also important to collect feedback from stakeholders, team members, and all the participants involved in the project. This feedback provides valuable insights into what worked well, what didn't, and the areas needing improvement.

Evaluating the overall impact of the project is essential to understand its significance and value. This involves analyzing the project's effects on various aspects, such as financial, social, environmental, or other kinds of impacts. Check the Monitoring and Evaluation chapter for more tips on evaluation and impact measurement. Reporting these findings to stakeholders helps provide transparency and accountability, showing the project's achievements and areas for improvement.

When the evaluation of the project is done you can start with the project's closure, which marks the formal end of the project lifecycle. This involves completing all necessary paperwork, formalities, and administrative tasks required to officially close the project. It includes archiving project documentation, releasing resources, and closing agreements associated with the project. We also recommend gathering what went well and what could be improved and reflecting on it with the team. This is also useful to incorporate the feedback and lessons learned to improve future projects. Implementing best practices and avoiding previously identified pitfalls contribute to continuous improvement within the organization.

Key questions to ask yourself:
- Did the project achieve its initial set of objectives? How do the actual outcomes compare to the intended goals and deliverables set at the project's start?
- What were the key insights gained from stakeholders, team members, and participants' feedback?
- What aspects of the project worked well, and which ones didn't?
- Have all necessary administrative tasks, paperwork, and formalities been completed for the formal closure of the project?
- How transparent was the reporting regarding the project's achievements and areas for improvement to stakeholders?

Main takeaways from this chapter

- Understanding the context and needs of the communities or environments targeted by the project is fundamental. It ensures alignment with organizational missions and community needs, leading to a clearer vision of objectives and goals.
- Well-defined objectives facilitate establishing measurable outcomes, helping in progress tracking, evaluation, and impact demonstration.
- Assembling the right team with defined roles and responsibilities is critical for project success.
- Creating a structured schedule with milestones, deadlines, and task sequences is crucial.
- By providing a visual representation of your project strategy you can provide greater transparency between participants.
- Visualizing budget distribution via spreadsheets facilitates understanding and management of project costs.
- Defining communication channels, frequency, and tools (e.g., software, meetings, emails) ensures effective communication.
- Anticipating potential risks or challenges, involves preparing for schedule delays, unforeseen expenses, and ensuring readiness to address unexpected obstacles that may arise during project execution.
- Effective delegation ensures task completion while the manager guides, supports, and motivates team members, fostering a positive working environment.
- Continuous monitoring of progress against predefined milestones and objectives is needed. Regular check-ins and status update meetings facilitate effective tracking of progress.
- Warning stakeholders about potential delays or changes is essential to manage expectations and maintain transparency.
- A project's evaluation entails a comprehensive analysis of its accomplishments, to determine whether the project has achieved its intended goals.
- The project's closure involves completing all necessary paperwork, formalities, and administrative tasks, as well as gathering feedback from all stakeholders that participated in it.

Communications

The strategic aspects of setting realistic goals, engaging followers, and utilizing appropriate channels, emphasizing constructive and solution-based communication.

Setting realistic goals and strategy

In terms of communication, the majority of small and medium non-profit organisations face the same obstacle; a lack of resources, in opposition to big NGOs who can afford large marketing and communication budgets. This usually leads to other projects or needs being prioritised instead, which is a big mistake.

It is indeed essential to have a communications plan or strategy in place, in order to guide the external communications efforts of the organisation in line with its mission and goals. An NGO without a communications plan is an organisation engaging with its audience blindly (*How to Create a Communications Plan for Your NGO?*, n.d.). Luckily, it is possible to build a low-cost communications strategy - financially but also in terms of staff and time - that is effective. As a starting point, we suggest the following simple steps:

(1) Ask yourself the proper questions

By doing this, you will be able to identify both the extent to which your NGO's communications are developing, the limitations it currently faces, and the opportunities that can be exploited.

Here are some examples of guiding questions (the more, the better!):
- Where are we?
- What do we need?
- How can communications help us accomplish our mission?
- What do we want to achieve with a communications plan?
- What is our audience?
- What are our strengths? What are our weaknesses?
- What are our actual resources in terms of money, people, and time?

(2) Identify the main challenges

Communication practitioners usually encounter many challenges: maintaining the audience's interest, designing a narrative that does not feed stereotypes to capture the audience's attention, countering predominant discourses, picking the right terms and language, engaging the youth, using the right tools, etc.

Depending on the objective - raising awareness among the organisation's audience, increasing the membership base, getting more donations, reaching more participants or beneficiaries etc. -, challenges will vary.

So think about this step as answering the question: Where are we getting blocked and why?

In order to identify the challenges properly, take into account limitations in terms of both external - audience, stakeholders, channels - and internal factors - budget, staff, communications expertise within the team, tools and software used -.

(3) Set realistic goals

Any NGO should strategically focus its communication and outreach efforts around a certain set of goals, which should in turn be aligned with the mission and goals of the organisation (How to Create a Communications Plan for Your NGO?, n.d.). Goals should always address problems.

You can identify both (problem and goals) using these problem analysis and goal setting techniques:

- Problem Tree Analysis. This visual tool can help you define the overall problem and identify the specific causes and consequences/effects. You can then examine the causes, and in conjunction with a thorough context analysis outlined in the section below, identify what the specific solutions are needed to address them which will then help you define your overall goal and objectives for change (Influencing for Impact Guide: How to Deliver Effective Influencing Strategies - Oxfam Policy &Amp; Practice, 2023).

- SMART goals. The SMART in SMART goals stands for Specific, Measurable, Achievable, Relevant, and Time-Bound. It's a set of parameters to help you ensure that your objectives are attainable within a certain time frame. This approach eliminates generalities and guesswork, sets a clear timeline, and makes it easier to track progress and identify missed milestones (Boogaard, 2023).

Finding the correct tone and engaging your followers

Communicating as an NGO is not just about conveying information about your activities but also about creating a consistent voice that represents your organisation, its values and its identity. The tone of your content and the language you use will help give an impression of your organisation to the public and attract the right audience to your platforms.

One of the first steps is to decide the overall tone of your organisation: whether you're aiming for a formal account with a serious tone and informative posts, an activist account with actionable posts, an account with a more informal, friendly tone or a combination (Agency of Good 2019). This is to ensure consistency in your communication style and to show your audience that your organisation has a clear message and direction.

As an NGO, you are likely working for a cause, focusing on a specific, local topic or raising awareness on wider global issues, or both. It is therefore important to decide which narratives you would like to deconstruct or reproduce on your platform(s). Examples could include reframing discussions about migration or homelessness, debunking myths about people with disabilities, or sharing solution-oriented communication about a specific conflict or environmental issues. Then in your individual content (social media posts, blog articles, videos), your focus should be on the language you use, ensuring that it is inclusive and constructive, a topic that is developed further in chapter 3.4.

To improve engagement from your audience, hashtags, tagging people or including at-mentions are all useful ways to improve the reach of your posts. Another important tip for engagement is to "humanise" your account, i.e. show that there is a human behind the screen managing the social media (Rochester University, 2023). You can do this by being active on social media, encouraging the audience to leave comments and then subsequently replying to them. Humanising the account can also involve showing the face(s) of people on your team, through a formal introduction post, an Instagram live, or short clips - be as creative as you like!

You may even want to think about interactive content for your social media posts as a way of improving engagement. Static posts, such as images, can become repetitive and do not stand out as much in the flood of content social media users are exposed to every day. This does not mean that static posts should be avoided - on the contrary, they are the primary form of content. However, they could be occasionally interspersed with more 'active' posts such as reels and videos or Instagram stories with questions for the audience to answer.

Uing the appropriate channels and tools

There is an array of different communication channels to reach their target audiences. These can range from traditional media such as press releases, newspapers, and radio to digital platforms like social media, websites, podcasts, and video content (Pankaj, 2023). Firstly, it is important to speak to different targets in different ways. Another NGO or business cannot be targeted in the same way as your social media followers, employees or other stakeholders.

On social media, once you've engaged your followers, one needs to make sure that the appropriate channels of engagement are used. As for different stakeholders, different material, tones and content is used for different social media pending on your followers (Honey, 2019). Linkedin for instance, being a professional social media, is used in a more formal manner, using text, and more serious content. On the other hand, instagram should be used in a manner that is informal, using colours, videos and fun content.

To better understand and plan appropriately, all small NGO should establish an overall communication strategy for all social media, but it then must be made more concise and adapted to the different social media to provide more tailored content. These strategies must consider the different types of audience found on social media and be ready to adapt content to it (Danyi, 2018).

In terms of tools, different systems of publication can be used to better program and sort posts. For instance, "Later" is of very good use for Instagram, Linkedin and Facebook. This tool also allows you to program posts and stories in advance and post them automatically.

The platform Canva is a very important tool for designing engaging and aesthetically-pleasing content that stands out, but as mentioned before: consistency is key! Making coherent designs that fit with your branding will make your social media feed look more sleek and professional. Additionally, as an NGO, you may be eligible to get a free Premium Canva account which can help reduce costs for your communications department.

The importance of consistency and being ready for change

As aided by such tools as mentioned above, whilst using your channels, consistency is key. One same font and design pattern should be used (Shores, 2021). Consistency will not only make your communication strategy look coherent, but also give you a brand identity which followers can recognise (Shores, 2021).

Although consistency is crucial, a communication strategy must also be ready to adapt to changes that might happen within our own NGO, our industry or even following world events (Eller, 2023). Thus, during the establishment of a strategy, a certain level of space must be left for controlled and consistent improvised communication responses to events which can happen during the implementation of the strategy.

Applying constructive and solution-based communication

Although language is usually something taken for granted, it shouldn't; words have the power to reinforce or deconstruct systems that maintain inequality, as well as reproduce or break narratives that promote racism and division.

Language is the basis for constructive communication, understood in this guide as opposed to crisis communication. Whereas in the latter, situations are portrayed as problems without a remedy, constructive communication advocates for a narrative focused on solutions to create confidence in our societies' ability to be part of a positive change or improvement. This type of communication aims at bringing positive emotions and solution-based content to communication, to inspire people to stand up for human rights and to change minds. Focusing all the attention on the worst crises and abuses drives people away, makes them feel useless or desperate, and can even make people accustomed to them.

Applying constructive and solution-based communication can promote that the audience feels empathy, improving the likelihood of them getting engaged with the story and acting about the issue (Human Rights Strategy | Hope-based Comms, n.d.).

Communication's influence on emotions

Emotions need to be taken into account when designing successful strategic communication in NGOs, as they entail actions from the audience. It is for this reason that the close link between language and emotions should not be underestimated. In this sense, such an emphasis on rethinking the language and shifting towards a more constructive one has several benefits:

1. It can enhance engagement with the movement, moving the audience from being passive to becoming supporters, and even advocates. Problem-based activism may make audiences feel helpless. A solution-based approach to activist strategic communication can present examples of how audiences can work to remedy the problem, encouraging engagement and action. People need to see the solution to support it (Ciszek, 2018).
2. It can shift the narratives that have historically shaped issues such as migration, climate change, or poverty, distancing them from the negativity that has dominated the discourses around these topics. Solution-based strategic communication can provide a narrative of survival and hope for the future that may be socially, politically, and commercially viable.

Emotions can be used in communication to make one's messages more resonant and impactful on both attitudes and behaviours. Moreover, research shows that emotion-based messaging using negative emotions should be combined with solutions to avoid reactive, maladaptive, or "boomerang" effects (Dennison, 2023). However, while emotion-based communication can enhance one's message, it should be simultaneously based on facts, values, identities, and efficacy. Emotions should not be confused with the appeal to emotion fallacy - arguing that something is true because of its emotional content. This becomes especially important when communicating any NGO's mission (Dennison, 2023).

Main takeaways of the chapter

- An NGO without a communications plan is an organisation engaging with its audience blindly.
- It is possible to build a low-cost communications strategy - financially but also in terms of staff and time - that is effective. As a starting point, we suggest the following three simple steps: ask yourself the proper questions; identify the main challenges, set realistic goals; and design and implement your communications plan.
- Constructive communication advocates for a narrative focused on solutions to create confidence in our societies' ability to be part of a positive change or improvement.
- Emotions need to be taken into account when designing successful strategic communication in NGOs, as they entail actions from the audience. However, emotion-based messaging using negative emotions can have "boomerang" effects, and thus it should be combined with facts and solutions.
- Consistency in communication channels, methods and designs is key.
- Expect the unexpected! Adaptation is an important part of communication and your communication strategy must be ready to be tailored to unpredictable events.
- Consider creating interactive content (reels, videos, Instagram stories) to make your feed more engaging
- Apply for Canva Premium for free as an NGO to create visually appealing designs at a low cost

Monitoring and Evaluation

The ongoing assessment of project impact and success.

In the dynamic landscape of non-governmental organizations (NGOs), effective planning, implementation, and assessment are crucial for success. This chapter delves into the realm of Monitoring and Evaluation (M&E) specifically tailored for small and medium-sized NGOs. Understanding the nuances of M&E is essential for maximizing impact and ensuring the sustainability of projects.

Monitoring and Evaluation: overview and key aspects

Difference between monitoring and evaluation

Monitoring and Evaluation are often used interchangeably, but they serve distinct purposes.

Monitoring is the systematic collection and analysis of data that measure progress towards achieving objectives. It is used to track changes in project performance over time and it helps stakeholders to make informed decisions towards effectiveness as well as efficient use of resources. It includes review of existing data, collection of new data and cross-checking of data.

Evaluation is the process of examining the performance of a project in meeting the expected objectives, determining aspects like its relevance, adequacy, effectiveness, efficiency and progress. It analyzes and compares the results against the agreed strategic plan to establish the impact and makes informed decisions on how to improve it.

But… What comes first?

Monitoring should come first, as it's an ongoing process that tracks progress and performance in real-time. It helps identify any potential problems early on, allowing for timely adjustments and improvements, and it provides data that is essential for effective decision-making during the implementation of a project. Monitoring is essential to ensure that the project or program is on track to achieve its goals and objectives.

Evaluation, on the other hand, is typically conducted at specific intervals, such as the end of a project. The purpose of evaluation is to assess the overall effectiveness, impact, and sustainability of a project over time. Evaluation provides insights into the long-term success of the initiative and provides recommendations for future improvements.

To ensure success, it is important to balance monitoring and evaluation throughout the project cycle. Early and ongoing monitoring helps identify potential problems and allows for timely adjustments, while evaluation provides a comprehensive assessment of the overall impact and effectiveness of the initiative.

Effective monitoring and evaluation require clear objectives, appropriate methods, and the involvement of stakeholders throughout the process.

Why is monitoring and evaluation important?

M&E provides NGOs with valuable insights into the effectiveness and efficiency of their projects. It allows for informed decision-making, improved accountability, and increased transparency. Additionally, effective M&E enhances learning by identifying successes and areas for improvement.

Monitoring and evaluation cycle

The M&E cycle typically comprises planning, data collection, analysis, and feedback. It's an integral part of project design, implementation and completion, and it's regularly cycling through the different project stages, to ensure that NGOs stay responsive to changing circumstances and continuously improve their interventions.

1. Initial needs assessment: identification of a particular need or problem in a specific community which your organization is able to address. Ideas are generated by learning from existing projects, projects which have ended or simply through conversations with partners, communities and funders.
2. Develop an in-depth understanding of the need or problem, its underlying causes and how it affects the target communities. This is also the stage to think through potential solutions with your partners and target communities. Having identified a need you then need to design a project. The project will be the most credible intervention to address the problem.
3. M&E planning: in collaboration with your partners and target communities, decide the main M&E activities and put in place a realistic plan for undertaking them. Planning is a critical stage in the M&E cycle where you should consider: conducting a baseline, undertaking routine monitoring, undertaking mid-term and final evaluations; deciding how to go about reflecting on information and learning from it to improve project performance.

4. During project implementation, monitoring will be an ongoing process. Ensure monitoring is taking place and make timely adjustments when needed.

5. It is recommended that you conduct a mid-term evaluation, as it allows you to take stock of where your project is and whether you are on target to achieve project outcomes.

6. At the completion of your project a final evaluation should be conducted. This is the stage of the MEL cycle when you evaluate, in collaboration with your partners and communities, whether your project brought about any real change in the lives of the communities you work with.

7. Once the final evaluation is completed, you should take time to review it and take note of any learning that can be gained. This stage also provides an opportunity to use this learning as input to new project ideas.

Data collection: types and methods

The effective collection and analysis of data play a pivotal role in ensuring project success and sustainability. Monitoring and Evaluation (M&E) serve as the cornerstone for informed decision-making, accountability, and continuous improvement.

Data collection is an essential part of Monitoring and Evaluation, as it involves gathering information from various sources in order to measure the success of a project. It must be established at the design stage of the project and should be clearly detailed in M&E plan.

Data collection methods will depend on the kind of indicators and the key questions identified.

Quantitative Data Collection
Quantitative data involves numerical information that can be measured and analyzed statistically. In the context of Monitoring and Evaluation (M&E) for small and medium-sized NGOs, quantitative data collection is crucial for obtaining objective and measurable insights.

Qualitative Data Collection
Qualitative data is non-numerical and often involves exploring subjective experiences, attitudes, and behaviors. In the context of M&E for small and medium-sized NGOs, qualitative data collection adds depth and context to the quantitative findings.

What is the best data collection approach?

Each data collection tool and method has its own advantages but projects are complex and their intricate dynamics cannot be measured through one method or one data collection tool alone.

Using a combination of quantitative and qualitative methods (mixed-method approach) enables a more holistic understanding and why it is or it isn't manifesting the expected outcomes. It also addresses the shortcomings and limitations of each method to provide more coherent, reliable and useful conclusions and increases the overall confidence in the validity of the evaluation results.

How to create good indicators

Indicators are measurable or tangible signs that something has been done or been achieved. Specific markers that measure the progress your project is making towards reaching its goals. Well-crafted indicators are essential for effective M&E.

They can be quantitative or qualitative and should be defined as clearly and precisely as possible, in order to know what you're measuring.

Indicators comprise a baseline and a target, both of which when compared against each other measure change. The baseline is considered a measure used to benchmark the current state of an indicator so that the recorded results can be appropriately calculated. The target is the improvement/achievement expected to take place while project implementation

Indicators should be specific, measurable, achievable, relevant, and time-bound (SMART) and should be defined for each project stage. An essential aspect when defining and selecting indicators is engaging stakeholders as it ensures alignment with project goals and fosters ownership.

From monitoring and evluation to impact measurement

The journey from M&E to Impact Measurement is a transformative odyssey. As small and medium-sized NGOs endeavor to create meaningful change within their communities, the need to move beyond the immediate outputs and outcomes becomes increasingly apparent.

Definition of key concepts: Impact, Social Impact, and Impact Measurement?

Impact is the effect that something, especially something new, has on a situation or person. It can be an intentional or unintentional change and it can have positive or negative long-term effects.

However, when we talk about social impact we refer to the positive or negative effects on society resulting from actions, policies, or projects. This change can be measured and quantified through impact measurement.

Impact measurement is the systematic analysis of lasting or significant change – positive or negative, intended or not – in people's lives brought about by an action or a series of actions. It will answer the following questions: What has changed? For whom? How significant was it? Will it last? In what ways did we contribute to these changes?

How Does Impact Assessment Fit with the Processes of Monitoring and Evaluation?

The transition from M&E to Impact Assessment is not a linear progression but a dynamic and interconnected process. Understanding the intricate relationship between these phases is essential for small and medium-sized NGOs aiming to articulate and measure the enduring changes brought about by their interventions.

A Continuum of Learning and Improvement:
Impact Measurement is an organic extension of the M&E cycle, representing a deeper examination of the transformative effects of a project. M&E lays the foundation by systematically collecting and analyzing data during project implementation, tracking outputs, and assessing short to medium-term outcomes. This wealth of information becomes the cornerstone for Impact Measurement, which extends its focus toward the longer-term, sustainable changes—the impacts that resonate beyond project completion.

Informed Decision-Making:
Leveraging the insights gained through monitoring and evaluating project activities, organizations can make informed decisions about the continuation, adaptation, or conclusion of their interventions. The data generated through M&E serves as a compass, guiding organizations toward effective strategies and offering a basis for refining approaches to maximize impact.

Learning from Successes and Challenges:
While M&E focuses on outputs and outcomes, Impact Measurement scrutinizes the underlying mechanisms that drive social change. It delves into the factors contributing to success and challenges faced during project implementation. By analyzing these factors, NGOs gain a deeper understanding of the contextual nuances, enabling them to replicate successful strategies and adapt their approaches to address barriers more effectively in future initiatives.

Accountability and Transparency:
The integration of Impact Measurement with M&E enhances the accountability and transparency of NGOs. Beyond reporting numerical achievements, Impact Measurement narrates the story of societal transformation. It provides stakeholders, including donors, beneficiaries, and the wider community, with a comprehensive understanding of the organization's contributions to positive change. This transparency fosters trust and confidence, essential elements in sustaining support for the NGO's mission.

Facilitating Continuous Improvement:
Impact Measurement serves as a catalyst for continuous improvement. By reflecting on the long-term effects of interventions, organizations can refine their theories of change, adjust strategies based on lessons learned, and cultivate adaptive management practices. The insights gained from impact measurement contribute to organizational learning, fostering a culture of agility and responsiveness to evolving community needs.

The Role of Stakeholder Engagement:
Stakeholder engagement is a common thread that weaves through both M&E and Impact Measurement. Engaging stakeholders at every stage ensures that their perspectives, concerns, and aspirations are considered. In the context of Impact Measurement, this engagement becomes even more critical as it involves a deeper exploration of the social fabric and the sustained effects of interventions on various stakeholders.

In essence, Impact Measurement is not a standalone endeavor but an evolution of the M&E process. It represents a commitment to understanding the enduring impact of interventions, learning from experiences, and using this knowledge to drive positive change. By seamlessly integrating Impact Measurement into their practices, small and medium-sized NGOs can amplify their effectiveness, demonstrate accountability, and contribute meaningfully to the broader landscape of social impact.

Key Challenges for Organizations in Assessing Impact and Ways of Mitigating Them

Assessing impact in the context of small and medium-sized NGOs brings forth a set of unique challenges that demand thoughtful consideration and strategic mitigation strategies.

Attribution and Causality. Determining the direct relationship between the NGO's interventions and observed changes in the community can be complex, given the multitude of influencing factors.
- Mitigation: embrace mixed-method approaches, incorporating both quantitative and qualitative data to triangulate findings. Establish baseline data and utilize control groups when feasible to enhance causal inference.

Timeframe and Lagged Effects. Impact often unfolds over an extended period, making it challenging to measure and attribute changes accurately within a project's timeline.
- Mitigation: Develop realistic timelines aligned with the nature of the intervention. Consider employing longitudinal studies or retrospective data analysis to capture lagged effects. Clearly communicate anticipated timeframes to stakeholders.

Quantifying Social Change. Quantifying qualitative aspects of social change, such as improved well-being or community empowerment, poses inherent challenges. Mitigation: Employ participatory approaches and qualitative methods, such as storytelling and case studies, to capture nuanced changes. Develop indicators that bridge qualitative insights into measurable metrics, ensuring a comprehensive understanding.

Resource Constraints. Limited resources, both financial and human, can hinder the comprehensive assessment of impact.
- Mitigation: Prioritize impact assessment activities based on their significance to project goals. Collaborate with external evaluators or research partners to augment capacity. Leverage technology for cost-effective data collection and analysis.

Data Quality and Reliability. Ensuring the accuracy and reliability of data, particularly when relying on self-reported information, is a persistent concern.
- Mitigation: Implement robust data validation processes, including cross-referencing with external sources and triangulating data from different methods. Invest in training for data collectors to enhance the accuracy of information.

Key Dimensions of Impact Measurement

Impact Measurement involves navigating several key dimensions that collectively contribute to a holistic understanding of an organization's influence on societal transformation.

What: Understanding the Nature of Change. Importance: Identifying and defining the specific changes brought about by the intervention. Measurement Strategies: Develop clear outcome indicators aligned with project objectives. Utilize both quantitative and qualitative methods to capture the nature and depth of change.

How Much: Quantifying the Extent of Change. Importance: Measuring the scale and magnitude of impact to assess the project's reach and effectiveness. Measurement Strategies: Utilize quantitative metrics, such as percentage changes, numerical counts, or standardized scales. Implement surveys and statistical analysis to quantify the extent of observed changes.

Who: Identifying stakeholders. Importance: Understanding the demographics, needs, and perspectives of those affected by the intervention. Measurement Strategies: Conduct thorough demographic analyses. Engage in stakeholder mapping and feedback sessions. Use participatory methods to ensure the inclusion of diverse voices.

*C*ontribution: Evaluating the Organization's Influence. Importance: Assessing the degree to which the organization's actions contributed to observed changes. Measurement Strategies: Employ counterfactual analysis and control groups when feasible. Establish a Theory of Change that explicitly outlines the organization's expected contributions.

Risk: Identifying Potential Negative Consequences. Importance: Recognizing and mitigating potential adverse effects of interventions.

Main takeaways of the chapter

- Effective planning, implementation, and assessment are crucial for NGO success.
- Monitoring and Evaluation (M&E) are essential for maximizing impact and ensuring project sustainability.
- Monitoring tracks progress in real-time and helps identify problems early. Evaluation assesses overall project effectiveness, impact, and sustainability, usually at specific intervals.
- M&E provides valuable insights, informs decision-making, improves accountability, and enhances transparency.
- Well-crafted indicators (SMART) are specific, measurable, achievable, relevant, and time-bound.
- Stakeholder engagement is crucial for defining indicators aligned with project goals.
- Impact measurement goes beyond immediate outputs and outcomes for long-term, sustainable change. It involves understanding impact, social impact, and systematic analysis of lasting change.
- Key Challenges in Impact Measurement: attribution and causality, timeframe, quantifying social change, resource constraints, and data quality are common challenges.
- Mitigation involves mixed-method approaches, realistic timelines, participatory methods, prioritization, and robust data validation.
- Understanding the nature and extent of change, identifying stakeholders, evaluating the organization's influence, and addressing potential negative consequences are crucial dimensions.

We would like to extend a heartfelt thank you to all those who have taken the time to read our Guide. We hope that it has provided valuable insights and practical recommendations for small and medium-sized NGOs.

We believe in the power of collective learning and improvement, which is why we welcome any feedback or suggestions. Furthermore, if you are curious to see how we are implementing the strategies and approaches outlined in this guide, we invite you to follow us on our social media accounts.

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