

PROJECT DESCRIPTION LAB

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I. LAB PREPARATION

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1. SITE VISIT AND INTERVIEWS

In principal most projects will have been visited at least once prior to conducting a Project Description Lab (PDL) event. Two Forms can provide helpful information on a project during such visits.

Form 2 - A Site Interview Form

The Form 2 can serve as an interview tool and conversation piece to begin to explore the particular aspects of the project which point to "Approaches That Work" and may be the focus of a PDL.

A site visit gives the opportunity to discuss more fully the purposes of the Exposition and discern the level of interest on the part of the project leaders and participants in participating in further documentation. This will help NSCs in making final selections and in selecting delegates as well.

2. SELF-EVALUATION AND QUESTIONNAIRE

Form 3 - Documentation Factors Questionnaire Form

The Form 3 Questionnaire is designed for projects to do an objective question and answer self-evaluation. It may be given to them during a visit or mailed to the project in advance of a visit, particularly if this seems to be a project with which a PDL may be conducted.

The Questionnaire may also be used in lieu of Form 2, particularly in view of the time factor leading up to conducting the PDLs and preparing exhibits.

\*NOTE - The Form 3 Directory Checklist weds together the Questionnaire and the PDL product.

3. TEAM COMPOSITION

Team members should be secured from as broad a base as possible in doing the PDL. Members should come from the NSC, ICA, other projects already participating, supporting organisations and co-sponsors where possible. The team configuration illustrates to the project the kind of cross-sectoral cooperation and interchange the Exposition is all about in "SHARING APPROACHES THAT WORK".

4. PROJECT AND ORGANISATION RELATIONS

The ICA and NSC in relating to projects and organisations must look for many ways for those who want to participate to do so. In addition to being delegates or having projects selected, on-going interchange can be established, projects included in the global directory and/or data-base, and Phase III possibilities discussed regarding activities following the Exposition Plenary.

5. VARIABLE DESIGNS

The five session outline that follows may be conducted over a variety of periods of time from one to five days depending on the need. It also may be edited to fit various circumstances. Whatever time frame or format is used the focus must be on USABLE COMMON PRODUCTS as outlines in sections III. and IV. of this manual.

II. THE FIVE SESSION OUTLINE

SESSION I PROJECT REVIEW

The intent of session one is to have the opportunity for the PDL team to get acquainted with local project leaders and participants while reviewing the materials and documentation which already exists on the project.

A. Materials Perusal

A formal or informal conversation format may be used to review the materials. Materials may include:

1. Annual Reports and Brochures
2. Newspaper or other articles
3. Any audio video-products
4. Forms 1 and 2 review and editing
5. Discussing the Form 3 Questionnaire
6. Third party evaluation of documentation

B. Site Visit

This period should also include a site visit as an opportunity to see what this project of organisation is doing directly. Depending on the nature of the project and the size of the geography, this may take from one to several hours.

During session one a clearer picture should begin to emerge as to what the particular approaches are within the project that should be described through the products of the PDL. It is not too early in session one to begin to get people used to the questions who, what, when, how, why, and where.

DISCERNING WHAT HAS MADE SOMETHING HUMANLY VIABLE AND BENEFICIAL IS A MATTER OF READING TACTICS BACKWARDS, WHETHER THEY WERE PLANNED OR NOT, TO SEE WHAT ACTUALLY OCCURRED.

C. Project Summary Statement

This session should conclude with a preliminary list drawn together by the team of the things they will watch for and probe more deeply during session two.

NOTE: If the one page Project Brief from Forms 1 and/or 2 has not been prepared on this project, take the time to do so now. This should minimally include the following paragraphs which relate to the final product paragraphs in ( ) at the end.

1. The Programmatic Arena summary paragraph...(5)
2. The Project Typologies summary paragraph...(6)
3. The Problem Arena on which this project is focused...(1)
4. The primary day to day activities that characterize this project...(2)
5. The relation to the Keystones of effectivity identified in the RDS...(3)
6. The story people tell about this project and its role in dealing with social need...(4)

These paragraphs will be finalized in Session V during the Products Preparation Workshop. They constitute the paragraphs for the one page Project Brief that will be published for the International Plenary "Project Catalogue."

## II. THE FIVE SESSION OUTLINE

### SESSION II IDENTIFYING THE APPROACHES THAT HAVE WORKED

The intent of this session is to isolate in a corporate discussion the Approaches that have Worked in this project. To do so the team will lead the group in three activities resulting in the first draft of the product of the PDL.

The three activities will include:

- A. A Wall of Wonder Timeline
- B. A Discussion of the Visible and Non-Visible Results
- C. A Writing Session that creates a set of paragraphs on the factors that describe this projects contribution in the documentation factors arenas.

#### A. The Wall of Wonder:

1. Use the time period from 1965 to 2000.
2. Plot when the project first began.
3. What was going on in the world at the time the project began? The Nation? The Community?
4. What challenge called for the birth of this project?
5. What have been the accomplishments--(use cards etc)?
6. What were the most difficult points?
7. What were the turning points?
8. What five things do you see happening looking back from the year 2000 between now and then?

#### B. Visible/Non-Visible Results

Introduce the Documentation Factors Screen and the broad categories first.

1. Practical Accomplishments
2. Local Participation
3. Replication Potential

Have them look back over their answers to the questionnaire. Art-form the main categories and the sub-categories then:

1. Make a list on a separate piece of paper of the most visible results in one column and the non-visible results in another.
2. Make a list of the kinds and occasions of local participation and what other participation was essential (i.e. technical, loans, etc.)
3. Make a list of methods and models that have become part of the ongoing implementation of the project.
4. Discuss the human factors involved in all of these. Give particular attention to the roles and participation of women.

#### C. Writing the Descriptive Paragraphs

Divide into four teams and write four paragraphs. Have two people draw up the Wall of Wonder Chart and make a chronological list of the historical events of the Project. This provides paragraphs II, III, IV, and 12 of the final product.(see pages 8-9)

II. THE FIVE SESSION OUTLINE

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SESSION III THE FIELD VISITS

The intent of this session is to interchange insights and expand perspectives through a series of selected field visits with a variety of persons, directly or indirectly associated with the project.

The day begins with a context including:

1. Review the questionnaire for the visits.
2. Go over the schedule and team assignments for the visits.
3. Discuss style and need for openness to draw out other peoples perspectives and insights as they will inform the process of the PDL.

If all appointments have not been prearranged, drop-in visits may be done. Targets for visits should include:

1. Sponsoring Organisation
2. Supporting Organisation
3. People involved in the project not attending the PDL
4. Contributors and friends of the project
5. Advisors and Consultants
6. Affiliated organisations and projects

Caution should be given to keep calls brief and cordial.

II. THE FIVE SESSION OUTLINE

SESSION IV DESCRIBING THE APPROACHES THAT WORK

This session intends to describe the actual tactics involved in accomplishing and developing the factors identified in Session II.

- A. Review the work from Session II and the reports from the fields visits. Then ask:
1. What are the three to five (3-5) most critical things that have "worked" in each of the three arenas without which we would not be where we are today?
  2. Which of these were referred to directly or indirectly during our field visits today?
  3. Which of these 9 to 15 items should we concentrate our time on describing for "sharing" with other groups and organisations across our nation and the world?
  4. Narrow the list down to 3 to 7 for today's work with the context that further work may be done later to describe other aspects not included today.
  5. We will call these items "Approaches That Worked". How would you describe in a sentence each "approach"? What title would you give that approach.
- B. Review again the subcategories on the "Documentation Factors" screen.
1. Put up a separate piece of butcher paper for each "approach" with one approach title on each.
  2. We are going back to search our memories to see what made this approach work. Go systematically through the five questions:
    - A. What was the obstacle we were up against when we developed or adopted this approach?
    - B. What was the sequence of events involved in implementing this approach. What events were referred to by other people during our visits today.?
    - C. Who was involved in developing this approach? What local people, others, etc.?
    - D. What methods were used or developed in implementing this approach.?
    - E. What reduplicable models have come out of this approach.?
  3. As we look toward the future, what would you do the same? What would you do differently?
- C. The Approaches Writing Session
1. Divide into groups and have each group write up one or more of the approaches.  
Each group should look carefully at the paragraph titles in the final product format--paragraphs 7-25--and select the appropriate categories for which paragraphs are needed in the "Approach they are writing. If unique paragraphs are required, see section V-C>
  2. Read and critique the paragraphs corporately and send to publish.
  3. Reflect on what we have learned today about our project, other's perspectives, the particular approaches we have been concentrating on, etc.

II. THE FIVE SESSION OUTLINE

SESSION V DESIGNING THE PRODUCTS PRESENTATIONS

The intent of this session is to launch the preparation for the presentation of the products which will be essential for "Sharing Approaches That Work" at the International Plenary and in the published materials that will precede the plenary.

National delegations are encouraged to prepare "corporate exhibits of the projects from their country whenever possible. The variety of projects will not always lend itself to this approach but the PDL work in this arena is directed toward that possibility.

This session has three elements:

- A. Determining the exhibition components.
- B. Refining the Profile Summary Paragraphs
- C. Refining the Global Database Paragraphs

A. The Exhibition Components:

Review the description of the Phase II International Exhibition Event in New Delhi and Talk about what will be going on in that ten days. Focus on the first three days when the exhibits are presented, oral reports are given, and written documents are reviewed.

Brainstorm the ways in which this project and its "Approaches" might be presented most informatively. Select the three to five most doable.

Design a timeline and proposed assignments for how these elements will be prepared.

B. The Profile Summary Paragraphs:

Give a Context on the "Directory of Projects" that is being developed for the International Plenary Event. Assign a small team to finalize these "Background Description" paragraphs from Form I or Session I of the PDL...(paragraphs 1-6).

C. The Documentation Factors Summary Paragraphs

Give a context on the Global Computerized Interchange Network that is being established to provide projects and organisations with access to methods and models that have been effective. Assign a small team to review and edit the Documentation Factors Paragraphs (II, III, & IV) on Accomplishments, Participation, and Replication from Session II. Assign a second team to review and edit the paragraphs on each of the Approaches that work from Session IV using the sub-categories from the Documentation Factors chart...(paragraphs 7-25). If categories are required that do not fit under any of these then write the paragraphs and give them clear distinct titles, different from the arenas covered by those sub-categories.

Note: It is important to keep titles of sections of the final product in the common categories in order to facilitate simple computer access to this information for use in the International Plenary in New Delhi.

III. THE PRODUCT OUTLINE

I. THE PROJECT BACKGROUND DESCRIPTION

- A. The Contact Information as called for on Form 3 Checklist
- B. The Programme Arena Summary Paragraph including specific sub-categories to the 18 general categories provided...(5)
- C. The Project Typologies Summary Paragraph including specific information about sponsorship, support, stage of development, etc...(6)
- D. The Problem Arena which this Project Addresses...(1)
- E. The Project Activities that transpire on a day to day basis...(2)
- F. The Relation of these activities to the Keystones of Effectivity identified in that nations RDS...(3)
- G. The "Purposeful" or unifying story that people in this project live out of as they go about their work...(4)

Use Forms 1 and/or 2, answers to the Form 3 questionnaire and PDL conversation to finalise these paragraphs.

II. THE PRACTICAL ACCOMPLISHMENTS: (Summary Paragraph II)

- A. The Perceivable Results that anyone sees or can see whether visible or non-visible (i.e. physical, statistical, attitudinal, etc.)...(7)
- B. The Beneficiary Impact on the need of those for whom the project was originally designed...(8)
- C. The Community Impact in terms of the overall change resulting in the community where this project is located as a result of its presence there...(9)
- D. The Approach Learnings - a summary paragraph of the primary approach learnings unless supplanted by a PDL product...(10)
- E. The Lateral Influence this project has had on other projects, organisations, or communities as a result of its presence and work...(11)
- F. The Project Journey - an outline of its major turning points in development unless supplanted by a write up of the timeline in Session II of the PDL...(12)

III. THE LOCAL PARTICIPATION: (Summary Paragraph III)

Describing the nature and degree of local participation of persons for whom the project was designed or other local persons who joined the staff or volunteered their time to help.

- A. In the Planning Process preceding project initiation...(13)
- B. In the Initiation of the Project...(14)
- C. In developing Management Skills to manage On-going Project Operations, evaluation and planning...(15)
- D. In developing Operational Capacities to implement the various day to day aspects of the Projects Activities...(16)
- E. In providing Local Inputs of time, materials, local wisdom, and labor...(17)
- F. The Women's Participation that has particularly evidenced a change in women's roles, skills, and/or willingness to participate fully and benefit with equity in the social arena this project intends to impact...(18)
- G. The key Human Factor elements contributing to changes in attitude, participation, knowledge, and skills utilised in this project...(19)

III. THE PRODUCT OUTLINE

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IV. THE REPLICATION POTENTIAL: (Summary Paragraph IV)

This section may constitute paragraphs and or lists as appropriate. It intends to provide in the Global Database a brief description of the methods, models, and considerations for replication of the "Approaches That Work" which have been documented in the PDL or might otherwise be accessible.

- A. Existing Training components, curriculum materials and staff sources for teaching them if required...(20)
- B. Methods and Models written up in a concise summary of each so that they can be accessed...(21)
- C. The Extension Intent for the replication of this project locally, nationally or globally...(22)
- D. Technical Feasibility issues such as particular expertise that need consideration in replicating this project elsewhere...(23)
- E. Financial Feasibility issues such as capital investments or use of particular equipment...(24)
- F. Leadership Availability of personnel and local people as consultants, advisors and/or workers to assist in replication...(25)

V. ADDITIONAL INFORMATION

A list of additional information and an indication of where to write to obtain this information which will be available in the published data base on this project.

- A. Literature and Brochures...(26)
- B. Audio Visuals...(27)
- C. Annual Reports...(28)
- D. External Evaluations...(29)
- E. Available Forms 1,2,3, etc....(30)

IV. FORMS FILING PROCEDURES

1. FORMS 1 AND 2

Form 1 - The Preliminary Project Profile Form

Form 1 is generally used in conjunction with an RDS as a way to develop a short preliminary profile on projects for an RDS Directory. After the RDS this form should be edited and forwarded to the nearest data entry point for your nation as part of the Global Directory of Projects. This should be cleared with project personnel and accompanied by a letter from them requesting that it be included.

Form 2 - The Site Interview Form

Form 2 is an optional form generally used following an RDS as an interview and conversation piece to further explicate the nature of and extent of the project. Note: Form 3 Questionnaire may be used in lieu of Form 2 (see below). The results of this interview form can be used by NSCs and ICA staff to select projects for further documentation. The results of this form should be forwarded to the nearest data entry point for inclusion in the Global Directory of Projects. This should be cleared with project personnel and accompanied by a letter from them requesting that it be included.

2. FORM 3 - PROJECT DIRECTORY CHECKLIST

The Form 3 Data Checklist is generally used by the PDL team to track the documentation being done on each project. It has four sections:

- A. Contact Information: Can be filled in by the PDL team from Forms 1 and 2.
- B. Programme Arenas: These are all the Programme arenas covered by this project although all may not be documented.
- C. Project Typologies: Provides typographical information that will assist other projects and organisations in finding similar situations to their own when looking at any particular programmatic arena.
- D. Documentation Factors: Constitute the outline for the Form 3 Questionnaire and the checklist for paragraphs prepared in the PDL.

After completion of the PDL this checklist should be sent with the Form 3 Questionnaire (see below) to the nearest data entry point to assist data entry administrators in being sure they have all the data coming to be included in the Global Project Directory.

3. FORM 3 - DOCUMENTATION FACTORS QUESTIONNAIRE

The questionnaire is a "self-evaluation" tool to be sent to or taken to projects in preparation for a PDL. Note: In some situations the NSC may prefer using this Form along with the checklist for the Site Visit in preparation for a PDL or at the Session I of a PDL as a way to launch the PDL itself. However it is used it should be seen as a primary input to the "PDL" for providing the grist for the summary paragraphs on the project and common background information for the NSC final selections and the PDL team. Following the PDL the Form 3 questionnaire answers should be filed with the Checklist and the PDL products.

IV. FORMS FILING PROCEDURES

4. FORM 3 - DATABASE PARAGRAPHS

The Form 3 Database paragraphs are intended to be short paragraphs providing further information or explanation to illuminate the answers given to the questionnaire. They can be written by the project personnel to explain anything they think may be unclear to someone else looking at the questionnaire. They provide general background information for the NSC in making final selections and for the PDL team common information in advance of a PDL.

For a project not participating in a PDL this may be sent to the global database for inclusion in the Global Directory of Projects along with the Form 3 Checklist and Form 3 Questionnaire.

For a project which is participating in a PDL these paragraphs may be revised to include specific documentation of the "Approaches" that the PDL describes. If the documentation is of the whole project, these paragraphs then are written along with any additional paragraphs as the full database on the project.

Final editing and approval of these paragraphs must be done with project personnel to ensure that they represent exactly what they want published on their project. If a previous letter requesting that they be part of the Global Directory of Projects has not been sent with Forms 1 or 2, then one should accompany Form 3 Questionnaire and Paragraphs.

5. THE PDL "APPROACHES THAT WORK" PARAGRAPHS

In addition to the above Form 3 Database Paragraphs, the PDL Product may contain paragraphs which do not fit under the three (3) broad categories or the twenty-three (23) sub-categories provided in Form 3.

- If so they should be given precise and concise titles that distinguish them from the Form 3 titles.
- If they go under a broad category (one of the three) indicate which category.
- If they go under a sub-category but require different sub-titles be sure to indicate which sub-category they are being related to.
- If they do not go under any of the above indicate that they constitute unique categories discovered in the course of doing the PDL and new categories will be created in the Global Data Base to contain them.

Note: Database editors will need the clarity and concisness called for above.

Language and Translation:

The July 83 Task Force Recommendation is that all products be filed in two languages--the local language and English. Approaches may be made to embassies of other countries to provide translation into other languages as well to make the products more usable in the New Delhi International Plenary.

V. SUPPLEMENTARY MATERIALS

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FORM 3 - DOCUMENTATION FACTORS QUESTIONNAIRE

BACKGROUND DESCRIPTION

I PROBLEM ARENA

1. Has the underlying issue been addressed?
  - a. Yes
  - b. No
2. In what arena was the underlying contradiction found?
  - a. Economic
  - b. Political
  - c. Social
  - d. Education
  - e. Roles
  - f. Communication
  - g. Participation
  - h. Leadership
  - i. Training
3. Were local people involved in deciding the arena of contradiction?
  - a. Yes
  - b. No
4. How were the contradictions identified?
  - a. Community meetings
  - b. Community leadership
  - c. Future goals
  - d. Outside consultants

II PROJECT ACTIVITIES

1. Did the activities of the project increase community participation?
  - a. Yes
  - b. No
2. What are ongoing activities?
  - a. Planning
  - b. Community events
  - c. Beautification
  - d. Community workdays
  - e. Service
  - f. Community celebrations
  - e. Other
3. Were the other project activities self-supporting?
  - a. Yes
  - b. No
4. Were the activities initiated by the community?
  - a. Yes
  - b. No

III RURAL DEVELOPMENT SYMPOSIUM KEYSTONE RELATIONS

1. Name rural development keystones from your RDS that relate to this project.
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_
  - d. \_\_\_\_\_
2. Are the RDS keystones demonstrated in your project?
  - a. Yes
  - b. No
3. Which keystones are replicable for other projects?
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_
  - d. \_\_\_\_\_
4. Which category do your keystones most relate to?
  - a. Accomplishments
  - b. Participation
  - c. Replication

IV UNIFYING STORY

1. Can a significant portion of the community tell a meaningful story about the project and its history?
  - a. Yes
  - b. No
2. What are the new landmarks that hold the project story?
  - a. Buildings
  - b. Recreational facilities
  - c. Beautification
  - d. Statues and murals
  - e. Others

3. What are other elements of project identity?
  - a. Signs and symbols
  - b. Songs
  - c. Slogans
  - d. Newspapers
  - e. Information nodes
  - f. Other
4. How do the local people participate in telling the story?
  - a. Newsletters
  - b. Fund raising
  - c. Site Visit Leadership
  - d. Other
5. Is there an informal organization that spreads information and provides broad based input into the project?
  - a. Yes
  - b. No
6. How has the project induced more community cohesiveness?
  - a. Regular workshops
  - b. Regular assemblies
  - c. Celebrations
  - d. Festivals
  - e. Other

### PRACTICAL ACCOMPLISHMENTS

#### V PERCEIVABLE RESULTS

1. How are the project results measured?
  - a. More real income
  - b. Broader participation
  - c. Requests for service
  - d. Lifestyle changes
  - e. Press coverage
  - f. Other
2. How are project results communicated?
  - a. Project reports
  - b. Site visits
  - c. Word of mouth
  - d. Speaking bureau
  - e. Audio/visual media
  - f. Print media
3. How widely known are the project results?
  - a. Staff and beneficiaries
  - b. Funding sources
  - c. Local community
  - d. Regional/national
  - e. Worldwide
  - f. Other
4. Who interprets the project results?
  - a. Media
  - b. Staff
  - c. Beneficiaries
  - d. Designated spokesperson
  - e. Board members
  - f. Other

#### VI EFFECTS ON BENEFICIARIES

1. Were we able to measure beneficiary effects?
  - a. Yes
  - b. No
2. Were the resulting benefits in the arenas of
  - a. Economic
  - b. Education and training
  - c. Services
  - d. Utilization of resources
  - e. Living environment
  - f. Human resources development
3. What group most in need benefitted?
  - a. Women
  - b. Men
  - c. Youth
  - d. Elders
  - e. Children
  - f. Other
4. Are the resulting benefits documented?
  - a. Yes
  - b. No
5. What percentage of the people affected by the project received benefits?
  - a. 0-10%
  - b. 10-20%
  - c. 20-30%
  - d. 30-40%
  - e. 40-50%
  - f. 50-75%
  - g. 75-100%
  - h. 100%

## VII EFFECTS ON COMMUNITIES

1. Is this project a demonstration of popular participation?
  - a. Yes
  - b. No
2. In what arenas did the community change?
 

a. Participation	d. Living environment
b. Attitude	e. Health
c. Self-sufficiency	f. Other
3. In what group of people was change manifested first?
 

a. Children	e. Men
b. Youth	f. Women
c. Adults	g. Other _____
d. Elders	specify
4. How soon was significant change evident?
 

a. One month	d. Three years
b. Six months	e. Over five years
c. One year	f. Other
5. What was the primary catalyst for change?
 

a. Internal	d. Political
b. External	e. Cultural
c. Economic	f. Environmental

## VIII APPROACH LEARNINGS

1. Were the learnings from the project identified and documented?
  - a. Yes
  - b. No
2. How were the learnings documented?
 

a. Media	d. Training events
b. Audio-visual	e. Other _____
c. Project report	specify
3. What was the source of the key learnings?
 

a. Locally generated	d. Another project
b. Technical advice	e. Practical experience
c. Internal evaluation	f. Other
4. Have the learnings been incorporated into the project or subsequent phases of the project?
  - a. Yes
  - b. No
5. If yes, in what arenas were your learnings?
 

a. Community involvement	c. Use of local talents
b. Use of local agencies	d. Public, private and voluntary groups working together
6. What are the methods arenas of learnings in your project?
 

a. Feasibility methods	g. Motivational methods
b. Research methods	h. Documentation methods
c. Planning methods	i. Coordination methods
d. Evaluation methods	j. Training methods
e. Implementation methods	k. Funding methods
f. Organizational methods	l. Financial methods

## IX LATERAL INFLUENCE

1. Has your project had verifiable influence beyond the constituency of the project?
  - a. Yes
  - b. No
2. To what extent has this influence been experienced?
  - a. Neighboring community or group
  - b. Region/state
  - c. National
  - d. International
  - e. Other
3. Has this influence occasioned initiation of similar projects by other groups?
  - a. Yes
  - b. No
4. How was this influence transferred?
  - a. Sent representatives
  - b. Hosted project visitors
  - c. Media
  - d. Trained others in project

## X PROJECT EVOLUTION

1. What is the duration of this project?
  - a. One year
  - b. Two years
  - c. Three years
  - d. Four years or more
2. When were the key turning points in the evolution of this project?
  - a. Early phase
  - b. Middle phase
  - c. Later phase
3. What inputs contributed to the project evolution?
  - a. Money
  - b. External support
  - c. Community groups
  - d. Training
4. What name would you give the phases of the project (up to four)?
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_
  - d. \_\_\_\_\_

LOCAL PARTICIPATION

## XI PLANNING PROCESS

1. Who is involved in the planning process?
  - a. Staff
  - b. Board of directors
  - c. Community cross-section
  - d. Outside consultants
2. How does project constituency legitimize the plan?
  - a. Majority vote
  - b. Survey
  - c. Discussion consensus
  - d. Public hearing
3. How often is the project plan reviewed?
  - a. Weekly
  - b. Monthly
  - c. Quarterly
  - d. Annually
4. Is there a written project plan available?
  - a. Yes
  - b. No

## XII PROJECT INITIATION PHASE

1. Who initiated the project?
  - a. Local people
  - b. Outside group
  - c. Combination effort
  - d. Designated leaders
  - e. Combined Effort
  - f. Other
2. What methods were used to get local participation in initiating the project?
  - a. Public community meetings
  - b. Working with designated leadership
  - c. Publications or broadcasts
  - d. Word of mouth
  - e. Others

3. What roles did local people play in the initiation phase?
  - a. Volunteer work days
  - b. Employers
  - c. Managers
  - d. Board Membership
  - e. Staff Volunteers
  - f. Other
4. How were local people involved in guidance and review of project direction during the initiation phase?
  - a. Defining objectives
  - b. Money allocations
  - c. Evaluation process
  - d. Advisory roles
5. Who else is involved in guidance and review?
  - a. Local officials
  - b. Local advisory
  - c. Board of directors
  - d. External staff

#### XIII MANAGEMENT SKILLS

1. What management skills are required for project implementation?
  - a. Administrative
  - b. Fiscal management
  - c. Human relations
  - d. Public relations
  - e. Supervisory
  - f. Others
2. To what extent were any of these skills available among local people?
  - a. High
  - b. Medium
  - c. Low
3. Have skills been acquired during the course of doing this project?
  - a. Yes
  - b. No
  - c. How? (1) training \_\_\_\_\_  
(2) apprenticeship \_\_\_\_\_  
(3) other \_\_\_\_\_
4. Is there a schedule for project participants assuming full responsibility for the project?
  - a. Yes
  - b. No

#### XIV OPERATIONAL CAPACITIES

1. Have local people acquired planning skills for ongoing project operations?
  - a. Yes
  - b. No
2. Do local people provide leadership in the day to day implementation of the project?
  - a. Yes
  - b. No
3. Are there occasions for project self-evaluation in which local people learn evaluation skills?
  - a. Yes
  - b. No
4. Have local people participated in designing the organizational structures for ongoing project operations?
  - a. Yes
  - b. No

#### XV LOCAL INPUTS

1. What local knowledge and experience was included in the project?
  - a. Design
  - b. Initiation
  - c. Ongoing operations
  - d. Other
2. Was labor/time contributed?
  - a. Yes
  - b. No
  - c. Time period \_\_\_\_\_ years
  - d. % \_\_\_\_\_
3. Was money put in by local people?
  - a. Contributions
  - b. Investments
  - c. % \_\_\_\_\_
4. Were local materials used in this project?
  - a. Yes
  - b. No
  - c. Type \_\_\_\_\_
  - d. % \_\_\_\_\_

## XVI HUMAN FACTOR

1. Has there been a change in the way people care for the environment?
  - a. Yes
  - b. No
  - c. If yes, how made manifest?
    - (1) homes
    - (2) gathering places
    - (3) public buildings
    - (4) utility service
2. Do people readily tell the story of the evolution of the project?
  - a. Yes
  - b. No
3. Has the participation of the people in school and training opportunities increased?
  - a. Yes
  - b. No
4. How would you describe the change in attitude of the people during the project?

## XVII WOMEN

1. Does the project bring special benefits to women who are :
  - a. Unmarried
  - b. Agricultural producers
  - c. Unemployed
  - d. Illiterate
  - e. Other ?
2. What is the range in age of the women who are directly benefitted?
  - a. 0-25
  - c. 50-75
  - c. 25-50
  - d. 75+
3. Were there existing women's groups or organizations prior to the project?
  - a. Yes
  - b. No
4. Does the project evaluation monitor the effect of this project on women?
  - a. Yes
  - b. No
5. Does the evaluation data effect the future plans for women?
  - a. Yes
  - b. No
6. Are the evaluation results available upon request?
  - a. Yes
  - b. No
7. Do the most recent plans reflect the newly discerned care for women?
  - a. Yes
  - b. No
8. With the newly created roles for women, what training opportunities exist in the project?
  - a. Industry and commerce
  - b. Trading and marketing
  - c. Health caretaking
  - d. Preschool teaching
  - e. Workshop leadership
  - f. Community leadership
  - g. Other
9. Will the viability and self-sufficiency of this project be self-generating when outside assistance ceases?
  - a. Yes
  - b. No
10. Does your project narrative include the intent, approach learnings and benefits realized for women?
  - a. Yes
  - b. No

REPLICATION POTENTIAL

## XVIII TRAINING COMPONENTS

1. Is there a training format or curriculum associated with the project?
  - a. Yes
  - b. No
2. Are local people trained to be the trainers?
  - a. Yes
  - b. No
3. What types of training are utilized?
 

a. Technical skills	d. Business skills
b. Leadership	e. Classroom
c. Literacy	f. On the job
4. Is there a structure for the documentation and ongoing maintenance?
  - a. Yes
  - b. No

## XIX METHODS/MODELS

1. Are methods and models documented so that they can be used with little orientation in the future?
  - a. Yes
  - b. No
2. Are the methods dependent on qualified instructors?
  - a. Yes
  - b. No
3. Are the methods translated into the local language?
  - a. Yes
  - b. No
4. Are the methods contentless and universally applicable?
  - a. Yes
  - b. No

## XX EXTENSION INTENT

1. Does the project have a plan for replication?
  - a. Yes
  - b. No
2. Do people take responsibility for leadership beyond the project?
  - a. Yes
  - b. No
3. Are there regular site visit opportunities at the project?
  - a. Yes
  - b. No
4. Is there ongoing exchange activity with other projects?
 

a. People	c. Data transfer
b. Information	d. Models

## XXI TECHNICAL FEASIBILITY

1. Is the required technical expertise available within the local area?
  - a. Yes
  - b. No
2. Is the replication dependent on particular technical equipment availability?
  - a. Yes
  - b. No

3. Are the ongoing equipment maintenance structures established?
  - a. Yes
  - b. No
4. Is the success of the project dependent on :
  - a. Geographic location
  - b. Climatic conditions
  - c. Presence of natural resources
  - d. Proximity to subsequent process technology ?

## XXII FINANCIAL FEASIBILITY

1. Is there a diverse funding base?
  - a. Yes
  - b. No
2. What ways were used to raise money?
  - a. Investments
  - b. Community fund-raising
  - c. Direct mail
  - d. Direct solicitation
  - e. Loans
  - f. Grants
3. Does the project depend on outside funding more than 50% from :
  - a. Government sources
  - b. Individuals
  - c. Private corporations
  - d. Foundations ?
4. Is there accountability for the use of funds?
  - a. Yes
  - b. No

## XXIII LEADERSHIP DEVELOPMENT

1. How many people would be prepared to play a leadership role in assisting a nearby project?
  - a. 1-5
  - b. 5-10
  - c. More than 10
2. What kinds of leadership skills are demonstrated by these people?
  - a. Leading planning meetings
  - b. Organizing and executing team tasks
  - c. Interpreting the project
  - d. Other
3. Would these leaders be capable of initiating a new project with a small team of people?
  - a. Yes
  - b. No
4. What age groupings are represented among the leaders?
  - a. 15-25 \_\_\_\_\_
  - b. 26-40 \_\_\_\_\_
  - c. 40-60 \_\_\_\_\_
  - d. 60+ \_\_\_\_\_
5. Is there an ongoing leadership program in your project?
  - a. Yes
  - b. No

## ADDITIONAL INFORMATION

LIST THE AVAILABLE ITEMS UNDER THE FOLLOWING 4 CATEGORIES:

Literature/Brochures  
 Annual Reports  
 Audio Visuals  
 External Evaluations

FORM 3 - PROJECT DIRECTORY CHECKLIST

Project No. \_\_\_\_\_

**A. CONTACT INFORMATION**

Project Name \_\_\_\_\_ Initiation Date \_\_\_\_\_  
 Project Address \_\_\_\_\_ Nation \_\_\_\_\_  
 Sponsoring Organisation \_\_\_\_\_  
 Supporting Organisation \_\_\_\_\_

Project Contact \_\_\_\_\_ Address \_\_\_\_\_  
 Position \_\_\_\_\_ City/Code \_\_\_\_\_  
 Telephone \_\_\_\_\_ Participation (Y) RDS \_\_\_\_\_ INTRV \_\_\_\_\_ PDL \_\_\_\_\_

**B. PROGRAMMATIC ARENAS - Check each arena included in this project:**

AGRICULTURE \_\_\_ ENVIRONMENT \_\_\_ ORGANISATION \_\_\_ EARLY LRNG \_\_\_ FAMILY \_\_\_ COMPREHNSIVE \_\_\_  
 INDUSTRY \_\_\_ INFRASTRCTR \_\_\_ ELDER'S \_\_\_ YOUTH \_\_\_ HEALTH \_\_\_ EDUCATION \_\_\_  
 COMMERCE \_\_\_ HOUSING \_\_\_ LITERACY \_\_\_ WMNS PARTCTN \_\_\_ TECHNICAL \_\_\_ EMPLOYMENT \_\_\_  
 OTHER (Specify General of sub-categories): \_\_\_\_\_

**C. PROJECT TYPOLOGIES - Check the appropriate item in each column:**

GEOGRAPHY	STAGE	SPONSORSHIP	FOCUS	ACCESS	SUPPORT
Arid ___	Demnstrtion ___	Local ___	Individual ___	Immediate ___	Private ___
High Agri. ___	Expansion ___	NGO ___	Group ___	Intermediate ___	Public ___
Fringe ___	Replication ___	Government ___	Village ___	Remote ___	Voluntary ___
Other ___	Other ___	Private ___	Other ___	Other ___	Local ___

**D. DOCUMENTATION FACTORS - Check each category for which there is a summary paragraph or Form 3 Questionnaire Responses:**

I. BACKGROUND DESCRIPTION	II. PRACTICAL ACCOMPLISHMENTS	III. LOCAL PARTICIPATION	IV. REPILICATION POTENTIAL	V. ADDITIONAL INFORMATION
1. Problem Arena ___	7. Perceivable Results ___	13. Planning Process ___	20. Training Components ___	26. Literature Brochures ___
2. Project Activities ___	8. Benefit Impact ___	14. Project Initiation ___	21. Methods & Models ___	27. Audio/ Visuals ___
3. RDS Keystones ___	9. Community Impact ___	15. Management Skills ___	22. Extension Intent ___	28. Annual Reports ___
4. Unifying Story ___	10. Approach Learnings ___	16. Operational Capacities ___	23. Technical Feasibility ___	29. External Evaluations ___
5. Programmatic Summary ___	11. Lateral Influence ___	17. Local Investment ___	24. Financial Feasibility ___	19. Human Factor ___
6. Project Typologies ___	12. Project Journey ___	18. Women's Participation ___	25. Leadership Availability ___	30. Available Forms 1. ___ 2. ___ 3. ___

**Note:** File this Form with the Questionnaire and/or the PDL if one is conducted.