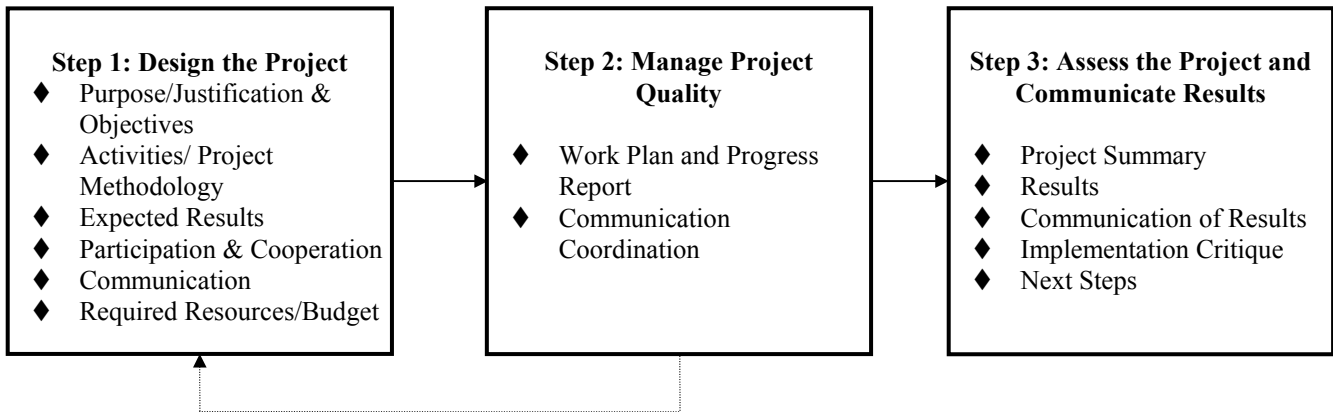

STEP 1: DESIGN THE PROJECT



Questions to Ask Yourself:

- Why are we undertaking this project? What need is it fulfilling?
- How is it different from what has already been done? How does it add value?
- What results do we hope to achieve, and for whom?
- What steps will we take to achieve those results?
- How will we know if we have achieved those desired results? How will we measure our results?

Purpose/Justification and Objectives

In developing a project, you need to know what you want to achieve (your objectives), why you want to achieve them (your purpose/justification), what you need to do to achieve them (your activities), and how you will know that in fact you have achieved them (your expected results). We begin with a discussion of the purpose of your project because the purpose, as the broadest goal of your project, will be the inspiration for all the future steps.

Purpose/Justification

The purpose or justification is a broad, general statement about your goals. The purpose/justification of the project answers the question “Why are you doing the project?” When describing the project’s purpose, you should include information about how your project builds on past projects or why your project was needed to fill some gap or to achieve progress. You will be asked to describe your project’s purpose/justification in paragraph #3 in the APEC project proposal forms (see Appendix A).

When you design the project, identify its purpose and one or more of the APEC goals or for HRD projects, one of the HRDWG Strategic Priorities and Medium Term Priorities (see Appendix E for HRDWG Strategic Priorities) that the purpose addresses. Section #4 of the APEC project proposal forms asks for this information. If your project is an Ecotech project, you may also want to refer to the Manila Declaration; if your project is a TILF project, refer to the Osaka Action Agenda (see section #5 on APEC proposal forms in Appendix A). Each project leader must decide if his or her project is an Ecotech or a TILF project. Project proposals for Ecotech projects must also include the Ecotech Matrix. The matrix may also be found at: http://www.apecsec.org.sg/virtualib/virtualib_org.html.

Projects usually have a broad purpose such as these:

- To improve skills or knowledge for students, teachers, or workers;
- To address and enhance the participation in the labor market by disadvantaged groups²
- To provide materials or resources, such as tools, techniques, databases, and articles and reports describing research findings that consider the different realities of women and men;
- To improve a program, or to affect policy, keeping in mind the differential impacts on men and women.

Exhibit 3, column 1 (page 12) illustrates some project purposes.

Objectives

Next, identify your objectives—more specific goals that you expect to attain—as well as the intended benefits and beneficiaries such as businesses or other private sector groups and institutions (see section #6 on the APEC project proposal forms). For example, if your purpose is to keep staff skilled in current computer technology, an objective may be to increase the use of spreadsheet programs by 50 percent,

² See calls made by APEC Leaders 1996, 1997.

increase scores on a word-processing skills test by 25 percent, or increase familiarity and research abilities on the World Wide Web. Objectives should

- Be specific,
- Outline how the intended benefits will be accomplished; and
- Outline how such benefits will be shared by both male and female target beneficiaries.

Exhibit 3, column 2 (page 12) provides examples of objectives and the corresponding project purposes.

See Appendix B for additional project management forms to help you to clarify your purposes and objectives as you begin to develop your project.

Activities/Project Methodology

Given your stated purpose and objectives, what are some ways they can be achieved? The activities you choose are the actions that will achieve your goals. The methodology describes the sequence of the project's components or activities (see sections #11 and #12 in the APEC project proposal forms). For example, if your objective is to improve computer skills, developing and providing a training session on a specific set of computer skills is one way to achieve your goal. Other possible activities include developing a training manual or video, providing individual tutoring, or having one-hour question-and-answer sessions with small groups. You may choose to pursue only one of these activities, or you may combine them. The important point is that your activity should closely match your objectives. It is also important to ask yourself the following question, "Are the activities equally applicable for women and men?"

In order for your activity to match your objective, any products or events that result from your chosen activity must be of high quality. For example, if your goal is to increase computer skills (objective) and your training manual (product) is not understood by the trainees (because it is of low quality), the trainees will not learn new skills and you will not have achieved your objective. Thus you should make sure that your activity incorporates assurances of high quality. Include one or more of the following:

- A pretest or pilot study;
- An extensive and current review of the literature;
- Consultation with expert women and men (including someone with expertise on gender issues, if appropriate)
- Peer review.

To aid the design of your project, discuss it with women and men who have expert knowledge in your research area, have done similar projects, are familiar with project management, or are good methodologists. For example, the quality of a questionnaire developed in a project will improve if (1) methodologists, statisticians, or people with project experience review the questionnaire; (2) it is pretested on a few people who are similar to the group of interest; (3) each question can be directly associated with a relevant research topic; or (4) it is reviewed by people with extensive knowledge in the research topic.

Exhibit 3, column 3 (page 12) gives examples of activities that project purpose and objectives.

The additional management forms in Appendix B will help you to clarify your activities as you develop your project.

Outputs/Deliverables

Outputs are the products of your activities (see APEC project proposal form section #10). A deliverable is an output that is submitted to a funding agency by a date decided in advance of the project's funding. For example, if your activity is to develop a training manual then the output is the manual; if your activity is to provide a computer-training class, then your output is the class. You might submit as deliverables the manual, in the first case, and a summary of—or syllabus from—the class, in the second case. Your project proposal should list the products that you will submit as deliverables and the dates by which you will submit them.

Expected Results

Results are the actual results of, and changes caused by, your project (see sections #10 and #19 of the APEC project proposal forms in Appendix A). The results of your project should, at least in the long term, meet or exceed your objectives. Of course, you cannot guarantee the extent to which your project's results will match your objectives before you even begin, but you can determine three things:

- What results you expect;
- How you will measure these results; and,
- How will the expected results contribute to APEC goals?

If your objective is to increase computer graphics skills by 15 percent, how will you know if you have achieved it? In other words, how will you measure the 15 percent increase that you hope to attain? One way would be to develop a test of these computer skills and give it to participants before and after a training program. Then compare the before and after scores to see whether they have, on average, increased by 15 percent. Another way would be to count the number of documents created by participants using those computer skills over the next year (after they have had the training). You could compare the use of the skills by participants, as measured by the number of documents, to use of the same skills by nonparticipants (such as staff in similar offices).

Your project's results could be measured along the following dimensions:

- Quantitatively and qualitatively (numerically and nonnumerically)
- Internally and externally (participants and nonparticipants)
- Across the short and long terms (immediately and later)

While you are thinking about comparing groups, also consider the ways that the project may affect groups differentially. Will women and men, high- and low-income persons, persons with disabilities, and others disadvantaged people or groups be affected by the project in the same ways? Are there any barriers to certain groups that would affect their ability to participate equally in an activity? You may want to make changes now to be sure to include each group. Making sure to measure these subgroups

will allow you to collect information on how the results vary for different groups and will assist you in identifying gaps for future APEC project work.

At this time, you also need to collect **baseline data**. Baseline data is the data that you collect now that will serve as your starting point later. What that means is that all progress will be compared against these data. If there is an area of business performance that may be affected by your project and is important to economic growth, then make sure to measure it now. For instance, if a year into your project you notice that local businesses seem to have a significantly more customers than last year, how will you document this? How will you back up your perception? If you had measured the number of customers *before* the project was implemented, you could measure the number of customers again and test whether there was a change. You could then back up your assertion by noting that the number of customers has increased by 20%. Remember that if you have not documented where you are starting from, you will miss areas where your project is *succeeding*!

Collect your baseline data now or as soon after the project begins as possible. Chances are your program will have some initial effect that you will miss if you don't measure everything before you begin. The longer you wait, the less change and impact you may capture.

Note that when you get to Step #3, "Assess and Communicate Results," you will collect much if not all of this data again. It is critical to **use exactly the same measures** (i.e., ask the same questions) when assessing your project's progress as you did when compiling the baseline data. For instance, if you send out a survey to businesses, you should send out the same survey when you assess your progress. As we have all seen on public opinion surveys, very different results can arise from minor difference in question wording. So, be sure to document and *keep all data collection measures*.

When writing about your expected results, try to address each area of expected results including participation and impact. Participation refers to who and how many people, organizations, or economies are involved in your project. The impact of your project describes the way in which women and men, organizations, or economies are affected by the project.

The additional management forms in Appendix B will help you to clarify your expected results as you develop your project.

Also remember that the measures you choose should be able to assess whether you have achieved in the short and the long terms the objectives that you have established. APEC projects generally only consider short-term measures. However, it may be useful to think through what kind of results you would expect in the long term. Aspects of the project's products or processes and immediate changes resulting from the project are the short-term results. Changes that occur as a result of those products or processes some time after the project has ended are the long-term impacts. Furthermore, the short- and long-term measures may be answering entirely different questions, not simply the same questions asked after a period of time. For example, if you did a computer training session for office managers you may want to know (a) how each manager's skills improved and (b) whether the managers informally transferred those skills to others in their office. The first question may be repeated across time, but the second may only be asked after some time has elapsed after the training because the informal transfer of knowledge would take time. However, you should keep in mind that the effect of your project, the change it will produce, will itself change across time. Thus you may want to measure the effect of your project more than once over time.

Exhibit 2 gives examples of possible short- and long-term measures for the products listed.

EXHIBIT 2

Examples of Project Products and Measures of Results

Product	Short-term Measures of Results	Long-term Measures of Results
Report	<ul style="list-style-type: none"> • Number of experts, men and women, who reviewed the report, rated it highly, and felt it contributed value • Number of people who read the report and their opinions of the report 	<ul style="list-style-type: none"> • Impact on the field after five years as evaluated by experts within the field • Number of requests for the document within first two years of distribution
Seminar	<ul style="list-style-type: none"> • Number of participating women and men who reported usefulness of seminar • Amount of discussion, interaction, and cooperation raised by seminar • Number of women and men who attended 	<ul style="list-style-type: none"> • Number of requests to repeat seminar
Training workshop	<ul style="list-style-type: none"> • Number of men and women participants who completed the training • Number of women and men who rated the training useful • Immediate increase in skills as reported by participants or observed by supervisor 	<ul style="list-style-type: none"> • Increased use of training materials or ideas over time • Improved skills that built upon training materials
Database development	<ul style="list-style-type: none"> • Accuracy of data • Breadth of data • Data disaggregated by sex • Number of variables within database 	<ul style="list-style-type: none"> • Extent of use (such as the number of studies or articles referencing the data)
Hands-on products (videos, guidebooks, manuals)	<ul style="list-style-type: none"> • Number of men and women who reported products as useful and comprehensive • Highly rated by a panel of experts • Does it lead to change? 	<ul style="list-style-type: none"> • Requests for additional copies. • Increased productivity of office • After many months or years, experts' or peers' references to the products as being of high quality
Best-practices study	<ul style="list-style-type: none"> • Rated the most useful method, the most efficient method, or the simplest method 	<ul style="list-style-type: none"> • Method used most often by participants after one year • Easiest method to train or teach

Tips for Success: Project Design

- Specify the links between the objectives and the expected results of your project.
- Specify the ways in which activities you plan will lead to the expected results.
- Specify how you will measure your results

EXHIBIT 3

Purposes, Objectives, Activities, and Expected Results

Purpose/ Justification	Objectives	Activities/ Project Methodology	Expected Results
<p>To improve the effectiveness of on-the-job (OTJ) training programs for men and women in APEC member economies.</p>	<ul style="list-style-type: none"> ◆ To educate members about OTJ by providing them with in-depth knowledge about a range of OTJ approaches. ◆ To monitor how that information is absorbed. ◆ To observe an increase in skills after one year of information dissemination. ◆ To enhance the effectiveness (or access) of women and youth in the workplace. ◆ To improve skill levels and employability of men and women 	<ul style="list-style-type: none"> ◆ Develop and distribute a manual illustrating five different OTJ approaches. ◆ Run several OTJ programs using different approaches that are explained in the manual we developed. 	<ul style="list-style-type: none"> ◆ Experts rate on average the usefulness, effectiveness, and comprehensiveness of the manual above 7 on a scale of 1 to 10. ◆ OTJ instructors report that the manual is effective ◆ 75% of women and 75% of men report that the manual is effective ◆ Participants report using the skills learned in the OTJ at least once a day. ◆ Over a period of six months, using OTJ skills, OTJ trainees produce 50 percent more documents than non-OTJ staff produce over a period of six months.
<p>To enhance small-business growth for male and female entrepreneurs within APEC communities.</p>	<ul style="list-style-type: none"> ◆ To increase networks and communications among small businesses. ◆ To increase management skills and knowledge. 	<ul style="list-style-type: none"> ◆ Have successful owners visit beginning entrepreneurs in a mentoring relationship; ◆ Develop and distribute a resource guide about where to get financial and other support. Include information on other small businesses, their owners, their approaches to management, and suggestions for networking and development. 	<ul style="list-style-type: none"> ◆ Participants report learning at least two new skills or valuable information by attending. ◆ Participants' businesses show significantly more growth over the following two years compared with the growth of businesses run by nonparticipants or those who only participated in one part of the program. ◆ Participants' scores on a management assessment test increase by 25 percent. ◆ Recruitment and retention of staff through improved management practices.

Now that you have established—through your stated purpose, objectives, activities, and expected results—*what* you want to accomplish, you must determine what you will need to accomplish it, namely:

- Participation and Cooperation,
- Communication, and
- Required resources.

Participation and Cooperation

Along with identifying project objectives and expected results and the activities required to achieve your objectives, you may also want to identify potential partners whose support and participation could contribute to the success of the project (see section #7 in the APEC project proposal forms in Appendix A). Partners will vary with the project and could include businesses, labor organizations, or civil society groups. You may wish to consider specifically including women’s groups. The types of support that partners provide also will vary. Businesses, for example, may provide technological support or access to additional financial resources, while universities may provide research support, and ministries of education may provide sites for field-testing educational programs.

For your project to be considered an APEC project, you must secure the support of APEC members. As a general guide, more than half of APEC membership should show intention to participate.

For all of your partners, you will want to establish in writing—before your project begins—the extent of participation to which that partner is committed. By clearly describing the participation in writing, you and your partner will be sure to have the same expectations for what support is to be given and what work is to be done by whom. Ask your partners for feedback on how the project might be improved to enhance participation by women and by business, labor, and civil society in their economy and also encourage them to include both women and men among their participants. At this time also tell your partners when, how often, and in what form (e.g., written report or phone call) you will keep them informed about the project’s progress.

“Participation and Cooperation,” in Appendix B, provides a form for identifying APEC members and other partners.

Communication

Before your project begins is also the time to establish your plans for communication (see section #18 in the APEC project proposal forms). You will want to consider how you will communicate with partners during the project, as well as how to disseminate the results of your project once it is complete. To communicate the results of your project you will want to:

- Decide on the project’s target audience, message, and desired result
- Determine your method of communication, ensuring that it is appropriate for both women and men

A first step is to prepare a project abstract, as described in this section. Although you will not have many details to communicate at this early stage, you will be more prepared to communicate later if you lay the groundwork now. At minimum, you should decide who your audience is and how you will communicate with them, and write and distribute your project abstract.

A project abstract can help you elicit interest in your project. Prepare a one- or two-page project abstract that highlights the key aspects of your project, including how the project includes or considers both women and men. An abstract typically includes the following:

- Project purpose and objectives,
- Project activities and expected results,
- Key tasks,
- Partners, and
- Timeline.

The abstract provides a succinct summary of the project that can be used by the funding agency to respond to questions about the project. It can also be distributed at conferences and meetings or mailed to organizations and countries interested in the project content. Project abstracts can also serve as an introductory summary of the project when you are inviting organizations to participate in the project, conducting field tests, and the like.

Decide the Project's Target Audience, Message, and Desired Result

Spend some time thinking about possible audiences for the results of your project. Successful communication of your message is linked to having a clear objective and identifying audience members for whom the message is relevant (i.e., it relates to their work or interests). You can

- Target an audience and then tailor your message to the expressed interests of the target group(s), or
- Select project findings you find particularly important and then present the information in ways that selected audiences would find most interesting.

You may want to communicate the same message to all audiences. That is fine as long as you highlight information relevant to specific audience members. For example, if you are addressing policymakers, you may want to emphasize your project's policy implications and impact; if you are addressing participants, you may want to focus on issues of job satisfaction. Consider again how your message will be received by both women and men. Tailoring your message to your audience increases opportunities for support of your project now as well as support for your next project.

Potential audiences include the following.

- APEC partners,
- Other supporters/donors,
- Project managers,
- Policymakers,
- Participants,
- Participants in similar groups,

- Academic journals,
- Businesses,
- Labor and civil society organizations,
- The general public, and
- University researchers.

Determine the Method of Communication

There are many ways to communicate your activity's findings. You should choose a method that is appropriate to your target audience(s) and that promotes easy absorption of information for both women and men. Your method will depend in part on whether you are targeting a small or large audience.

The method may take the form of a technical report, an executive summary, or a "lessons learned" memo. Remember to check which documents are considered strictly APEC management documents and therefore are not for general distribution. Other common presentation formats are as follows:

- Newsletters,
- Presentations at seminars or meetings, and the papers that are distributed afterwards,
- Training and public information videos,
- Web sites,
- Brochures,
- Journal publications, and
- Site visits.

Materials should take into account levels of literacy, access to various media, and cultural practices. Strategies for large-scale dissemination may include a video that highlights the objectives of the project and relates its effects and processes through taped interviews or demonstrations. Other ways to communicate on a large scale include newsletters, a project Web site (set up under APEC or with a local university, for example), and presentations at international meetings.

Considerable information can be communicated in documents that are meant to be read quickly. For example, you can summarize management processes in a brochure by using *bullets* to highlight important points. A newsletter can include pictures of you and your project participants or diagrams and charts.

Presentations at seminars or meetings effectively provide information and generate initial interest among small and medium-size groups. Such presentations not only gives you an opportunity to present information, but they promote a dialogue around your presentation among the attendees. This method of communication has the added value of creating a dynamic exchange of information not available through other venues. Should you decide to give a presentation, be sure to inform invited guests of the objectives of your meeting, so as to center the dialogue around your intended focus. Your presentation may also be made available afterwards as a paper for wider dissemination.

Finally, do not overlook the value of getting project participants involved in your dissemination strategy. There is no stronger testimony to your project's effect than to have it communicated through a

participant. The effect on participants' productivity is easily documented through questionnaires and interviews, and demonstrated through direct quotes or video clips.

Communicating your project's findings can increase the effect of your project. There are many ways to disseminate information to various audiences both on small and large scales. It is through a careful assessment of your audience, its needs and capabilities, and your desired effect that you can develop a strategy that works best for you.

“Communication,” in Appendix B, provides a checklist for your project's communication.

Budget/ Required Resources

It is essential to determine in advance the resources you will need to implement the project (see section #15 in the APEC project proposal forms). Resources fall into two general categories:

1. Direct Labor/Staff:

- The number needed and their respective salaries,
- An estimate of hours each will devote to the project, and
- Consultants and experts (including honoraria, fees, and support staff such as secretaries)

2. Other costs:

- Travel costs (per diem, airfare, inter and intra city travel costs)
- Equipment (computers, telephones, fax machines, etc.)
- Overhead (office space, telephone service, etc.)
- Communications (phone, fax, mail, courier)
- Photocopying
- Publications & dissemination
- Supplies (paper, pens, letters, notebooks, envelopes, staplers, postage, etc.)

Tip: Staffing is an opportunity to advance APEC objectives to increase the participation of women.

Note: If you wish to apply for APEC funding, you must follow APEC financial rules and the appropriate funding cycle. Details of the steps to follow can be found in the “Guidebook on APEC Projects,” issued by the APEC Secretariat. Appendix A contains the budget, the criteria for assessment (on what aspects your project will be judged), and allowable expenses. The entire document can be downloaded from the APEC Secretariat home page:

http://www.apecsec.org.sg/apec_organization/policy_procedure/finance/Content.html.

APEC is an important source of funding for HRDWG projects, but you should also consider other funding sources (see Appendix E, “Suggestions for Further Readings,” for examples). In fact, non-APEC sources have provided funding for many HRDWG project activities. Furthermore, many

HRDWG projects are wholly self-funded (i.e., funded by the APEC members that propose and participate in the project).

A budget is a critical part of any work plan. The budget should provide an accurate estimate of the cost of the work plan that you have just completed. You will later use this budget to help you manage your costs. The budget consists of the following elements:

- A list of all tasks,
- Due dates for each task,
- Estimates of the time for each person associated with each task,
- Estimates of the cost for the people and resources associated with each task, and
- “Markers” of project spending.

To begin developing your budget, review the tasks detailed in the work plan. The budget should list the costs and resources for each task including each person who will work on a task, the amount of time each person will work, and the cost for that time. The budget should also list all costs for travel, communication, and the production of materials.

You may need only a simple budget in the beginning of your project. Appendix B has some sample budget forms (simple and detailed) that will help you prepare a budget. The kind of budget you choose, simple or detailed, will depend upon your funding agency’s requests, which usually reflect the amount of money involved (the more money you request, the more likely that people will want specific allocation information). We suggest using a more detailed budget as soon as possible because it will help increase your project’s organization and preparedness.

Estimating costs for a budget may be overwhelming for someone who has never completed a budget before. You may find it helpful to use the budget of a similar project as a guide to estimate time and cost. Remember to adjust costs for inflation rates over the period between when that study was done and when yours will be done. Similar studies may be found through your literature review and through your funding agency.

Finally, you will want to note on the budget at what points you will have spent one-quarter, one-half, and three-quarters of your funds. These notes will be your “markers” of project spending. The markers are helpful tools for monitoring your expenses, which will be covered in Step 2 under “Managing Costs.”

CHECKLIST FOR DESIGNING THE PROJECT

Item	Response	Comments
Purpose/Justification and Objectives (sections #3 and #4 of APEC forms)		
✓ Do you provide a concise statement of purpose that clearly addresses APEC and HRDWG priorities and APEC goals for the integration of women?	<input type="checkbox"/> Yes No <input type="checkbox"/>	
✓ Have you identified related efforts and demonstrated the relationship between the proposed project and these efforts?	<input type="checkbox"/> Yes No <input type="checkbox"/>	
✓ Do you specify concrete and appropriate objectives?	<input type="checkbox"/> Yes No <input type="checkbox"/>	
Activities/ Project Methodology (sections #11 and #12 of APEC forms)		
✓ Do you have a realistic activity to attain your objectives?	<input type="checkbox"/> Yes No <input type="checkbox"/>	
Expected Results (sections #10 and #19 of APEC forms)		
✓ Do you specify measurable results that include information disaggregated by sex?	<input type="checkbox"/> Yes No <input type="checkbox"/>	
Participation and Cooperation (section #7 of APEC forms)		
✓ Have you obtained adequate support from APEC members or other partners? Have you considered how different populations, including men and women, will be able to participate in the activities?	<input type="checkbox"/> Yes No <input type="checkbox"/>	
Communication (section #18 of APEC forms)		
✓ Have you written and distributed your project abstract?	<input type="checkbox"/> Yes No <input type="checkbox"/>	
Required Resources (section #15 of APEC forms)		
✓ Have you thoroughly identified resources—both people and funding—that you will need?	<input type="checkbox"/> Yes No <input type="checkbox"/>	
✓ Have you completed a budget and identified spending “markers”?	<input type="checkbox"/> Yes No <input type="checkbox"/>	
✓ Did you use budgets of other projects as examples and adjust the estimates accordingly?	<input type="checkbox"/> Yes No <input type="checkbox"/>	