



# Community Action Guide: DESIGN

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[www.onevillagepartners.org](http://www.onevillagepartners.org)

## Acronyms and Glossary

**DESIGN:** Dignified Engagement Solving Identified Group Needs. One Village Partners' participatory project design methodology.

**ACT:** Community Action Program

**CAG:** Community Action Group. Community Volunteers managing the project implementation in their community.

**HCD:** Human Centered Design. The Project Design methodology that DESIGN is based on.

**Project Officer:** The Facilitator of each of the workshops and the person using this manual to guide the CAG as they design their project.

**OVP:** OneVillage Partners

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## OneVillage Partner's Approach

OneVillage Partners (OVP) inspires and equips people to transform their lives and their communities. Working in Sierra Leone, West Africa, we partner with local communities and assist them to 1) develop sustainable solutions to their most pressing self-identified challenges, 2) empower new leaders, and 3) create new opportunities for women's economic empowerment. We believe this three-pronged approach is what is needed to create thriving, united, and self-determined communities.

The cornerstone of OVP's approach and program model is that development must be community-led; interventions must be inspired, identified, innovated, and implemented by community members. OVP believes that local people are integral in developing community solutions to their own self-defined needs, and that broad and mutually-respectful participation and a cadre of competent local change agents are necessary for ongoing community development. By placing people at the center of our approach, we ensure that change is driven within people and by communities; not by actors external to them. OVP's inclusive, community-led model, with a special emphasis on gender equity, fosters social cohesion and a collective sense of ownership among community members, which leads to equitable and sustainable development.

### Introduction to Community Action

The Community Action Program organizes, trains, and supports community members to achieve their vision of an improved quality of life in their village. This happens through a leadership training program that produces a targeted development project that effectively meets a community's self-identified and prioritized need.

The Community Action Program develops a cohort of intensively trained volunteers from the local community, the Community Action Group (CAG). These volunteers receive training in all aspects of the traditional development project cycle: Needs Analysis, Project Design, Project Planning, Implementation, and Monitoring and Evaluation.

### Introduction to Community Action: DESIGN

DESIGN is the second phase of the Community Action Program created as a people-centered and participatory method of project design and planning based off of Human Centered Design (HCD). OneVillage Partners has adapted this methodology into 14 workshops (and three facilitated community meetings) that not only achieves the objectives of HCD (delivers a tested, user-centered focused product) but also trains participants in the traditional basics of project design: budgeting, goal setting and monitoring.

This phase is divided into three distinct sections in line with HCD methodology: Inspiration (Analyzing the Priority Challenge further to get inspiration in how to address it), Ideation (Where the CAG begin brainstorming and testing ideas for a project to address the Priority Challenge), and Implementation (Where the CAG makes a plan for implementing the full project).

### How to Use This Guide

If you are a program officer with OneVillage Partners, you have already identified the CAG and the community's priority. If you are not working within the OneVillage Partners Community Action Program, make sure you have the following prepared before starting DESIGN:

1. **A Community that has agreed to work with you and implement their own project.** Having the community buy-in before starting the project is critical. Without the community properly being informed and giving their consent, you should not attempt to implement DESIGN there.

2. **Baseline information of the community.** You should know some basic information about the community – population, number of schools and clinics, number of clean drinking water points, and other pertinent demographical information.
3. **A group of dedicated volunteers.** It’s important to get a wide variety of skillsets and experience on the volunteer team. Do not just rely on those in traditional authority roles. DESIGN is not intended only for literate community members, which is why pictures and other interactive tools are used throughout. However, it’s important to have some members who can read and write with ease and have experience with previous development projects.
4. **A clearly defined need.** Have a specific need, or at least an area of intervention, that the project will be designed to address. In this guide we will be referring to it as the “Priority Challenge”. It’s important that the CAG and the community have endorsed this need as their priority to be addressed. This program is iterative, building on previous sessions. This means that once the group begins developing solutions, they can’t change their minds to focus on a different need to address (unless they want to start all over again).
5. **A suitable training space.** A good space to meet, debate, and brainstorm in peace is critical to the CAG’s success in implementing this project. Make sure that the space isn’t too open so that community members feel shy, but still large enough for the CAG to move around.

This guide is intended to be used in one rural community specifically, but the tools can be adapted for a broader context. The DESIGN workshops can work in an urban setting, as long as it’s a distinct community that it is being applied in, one that evokes a sense of belonging and ownership, like a specific neighborhood, or small town.

This guide contains many tools, so it’s important that the project officer implementing this guide familiarize themselves with the tools beyond the instructions included here. In the annex, you can find a list of resources to do more research.

Finally, as good facilitators, make sure that you are not only following the instructions included here, but are also listening, enquiring, and having an open mindset at all times.

## Output

By the end of this phase, the Community and CAG will have:

- A tested project prototype
- A budget for their project
- A time bound plan for project implementation
- Indicators and targets to monitor the impact of their project

## Outcomes

- The CAG have project design and implementation planning skills
- The CAG have a deeper understanding of the priority need they’ve selected
- The CAG understand the holistic nature of wellbeing in their community
- The CAG will have increased leadership skills
- The Community is mobilized to implement the project plan

## Role of Staff

The Staff’s role is to guide the CAG through the workshops, but also to be one step ahead of them. As this guide cannot give specific instructions on how to respond to every particular direction the CAG

might head in with their project, it's important that program officers thoroughly prep for each session and anticipate in advance the different paths the project design might take. The officer must also be constantly researching the topic to offer critical advice related to the priority need.

### Role of the Community Action Group (CAG)

The CAG are effectively attending a series of project design workshops that produce tangible outcomes they will use in their project. Each outcome is intended to build on the next, so full participation from the CAG is very important. Much of the work in these workshops is based on different perspectives from within the community, so it's vital that all perspectives (particularly those of women, youth or other traditionally marginalized) be included in the project design. Encourage participation from all CAG, and go at their pace. They must take the first step.

## Philosophy and Tools

### Human Centered Design

Although commonly associated with a particular brand of technological market philosophy, Human Centered Design (HCD) has many effective uses in the non-profit field. However, it still has a tendency to be exclusive and the domain of the formally educated. One Village Partner's approach meets the community members where they are, bringing the HCD concepts and tools to them in a more approachable way. The goal of DESIGN is so that the CAG will become increasingly capable of using these HCD tools on their own.

### Story-Telling

In a community with a strong oral tradition, story-telling is an effective means of capturing the experiences with the priority challenge and wisdom already present in the community. Story-telling also provides an entry point into wider human-rights discussions that are central to DESIGN: perspectives of vulnerable people, democratic engagement, sustainability, and accountable leadership.

### Problem Trees

Problem trees are an effective tool for analyzing core causes of a problem and its long term effects. A Problem Tree treats the core problem as its "trunk". Above the trunk you have the problem's effects represented as the branches. Those branches that are closer to the trunk are the immediate effects, those further up are the effects of those effects. Likewise, the roots closer to the trunk are the immediate causes, but moving one level deeper, you reach the causes of those causes.

### Role Plays

Role Plays are an effective tool for communicating complicated behaviors. They are an integral part of the CAG analysis and are also useful for educating the broader community on particular positive behaviors.

### Positive Deviants

Quite often, the problems that the CAG are grappling with in the workshops, have already been addressed in some form or other in the community itself. The people who are demonstrating positive behavior different from the behavioral norms are called Positive Deviants. Identifying members of the community that are "positive deviants" helps CAG come to a better understanding of what they might be able to practice to improve wellbeing in their community.

## Storyboards

To effectively address the challenge, CAG need to know what the use of the project will look like, short term and long term. Storyboards are a great way of capturing the immediate use, but it is also useful at identifying the obstacles to the sustainability of the project.

## Endogenous Development

Endogenous means “from within”. Endogenous Development is a focus on development from within the rural community. The rural population of Sierra Leone already have tactics for addressing the challenges they face, and have been doing so for decades. This flips the traditional aid model on its head. Like identifying Positive Deviants, it looks for answers and techniques that are already in the community. Using locally based methods and expertise in designing the prototype and developing the project plan will help in the implementation. Find the strengths that are already in the community and build on them.

## Taxonomy of Human Needs

The Taxonomy of Human Needs was created by the Chilean economist Manfred Max Neef as a more holistic way of measuring people’s needs, encompassing broader metrics like social and spiritual wellbeing. While we don’t use the actual taxonomy, the four “existential” categories that define those needs (Being, Having, Doing, Interacting) have been adapted to create a unique definition of Holistic Wellbeing that we use in DESIGN.

## Community Action Flow Chart

The entire DESIGN Phase is meant to provide a guiding logic for the project design decisions made by the CAG, but it can be easy for the program officer to get caught up and second guess themselves or the CAG. The Community Action Flow Chart is meant to guide the program officer when an idea, prototype, or activity needs to be rechecked for its effectiveness. It contains a series of YES or NO questions that will check the effectiveness or feasibility of the project or its activity. Officers can use it throughout, either for themselves or their discussions with the CAG.

## Community Action Objective Tree

To ensure the community’s project is effective, an Objective Tree has been adapted for use in DESIGN. An objective tree is a tool to ensure that each activity links directly with the intended goal of the project through the activities’ immediate outputs and outcomes.



Inspiration

# DESIGN STEPS

## INTRODUCTION



- **Objective:** The CAG have an understanding of the entire DESIGN process and the concepts and tools required
- **Outcomes:** CAG can identify all 14 steps of DESIGN process
- CAG can demonstrate awareness of Priority Challenge by recalling another's story of personal impact
- OVP has a history of development activities in target village

## UNDERSTAND

**Objective:** CAG have a deeper understanding of the areas of less wellbeing in their village and can demonstrate a heightened awareness of Priority Challenge

**Outcomes:** CAG are aware of the interconnected nature of wellbeing in their community

CAG have grouped personal impact stories into individual problems

CAG can indicate types of information needed to collect for research on problems

CAG demonstrate increased awareness of Priority Challenge



## UNDERSTAND BETTER



- **Objective:** CAG understand the problem areas in their community and identify a single Priority Problem
- **Outcomes:** CAG capably present information on particular problems researched
- CAG have learned new information on particular problem
- CAG (or community) can identify a single priority problem

## UNDERSTAND DEEPLY

**Objective:** CAG understand the causes of the priority problem and are able to identify a user focus

**Outcomes:** CAG are able to complete a detailed problem tree

CAG are able to know at least three core causes of priority problem

CAG can decide on the user focus for the problem statement



# DESIGN STEPS

## EMPATHIZE

**Objective:** CAG have a heightened understanding of the problem  
**Outcomes:** CAG demonstrate empathy with user  
 CAG have identified positive deviants  
 CAG have a clear problem statement



## PROBLEM SOLVING



**Objective:** CAG are able to analyze both local and external solutions to the given Problem Statement  
**Outcomes:** CAG can identify local solutions to problem statement  
 CAG can identify external solutions to problem statement

## BRAINSTORM

**Objective:** CAG generates an idea that addresses the Problem Statement  
**Outcomes:** CAG deliver many ideas for addressing the problem statement



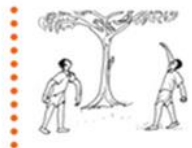
## PROTOTYPE



**Objective:** CAG have developed a sustainable project prototype to address the problem statement  
**Outcomes:** CAG are able to identify the meaning of sustainability  
 CAG have developed a "prototype(s)"  
 CAG understand the long-term use of the prototype(s)

## TEST

**Objective:** Prototype endorsed by the identified "users" of the problem statement  
**Outcomes:** Users have given feedback on Prototype, anticipated long term use  
 CAG can identify at least one way to improve the sustainability of the project  
 CAG have identified areas of sensitization



# DESIGN STEPS

## SET OBJECTIVES

**Objective:** CAG have identified the impact that their community project will have  
**Outcomes:** CAG have developed an impact  
 CAG have developed outcomes, outputs and activities  
 CAG have completed an Objective Tree



## BUDGET



**Objective:** CAG have budgeted for a sustainable project to address the problem statement  
**Outcomes:** CAG created a realistic budget for the project  
 CAG have identified the long term use of the project  
 CAG have identified barriers to the use of the project

## PLAN

**Objective:** Time-bound action plan developed for project to achieve its goal  
**Outcomes:** CAG have a time-bound, clearly defined action plan for project implementation  
 CAG have a time-bound, clearly defined action plan for community sensitization



## PLAN MONITORING



**Objective:** CAG know why monitoring of their project is necessary  
**Outcomes:** CAG can identify at least three reasons why you monitor

## CELEBRATE!

**Objective:** CAG feel confident in their learning through the DESIGN process  
**Outcomes:** CAG can name the sessions in DESIGN and learning derived from each session  
 CAG can provide examples for how learning has impacted their own lives  
 CAG have completed the ACT Midline Survey



## DESIGN Step 1: Introduction

### Objectives:

- The CAG have an understanding of the entire DESIGN process and the concepts and tools required
- Community Action Group (CAG) can identify all 14 steps of the DESIGN process
- CAG have shared stories of personal impact from the priority challenge
- A history of development activities in the target village has been created

### Materials:

Graphic Calendar, flipchart, markers,

**Participants:** Community Action Group

**Duration:** 2 Hours

**Location:** Training Space

### Introduction

Welcoming participants to each session is very important. It sets the mood for the rest of the day's session, so make sure it's *Playful, Reflective, and Open Minded*. Always be early and enthusiastic for all meetings.

**Energizer:** Choose and facilitate an energizer or an icebreaker so everyone gets to know each other better.

**Norms:** Ask the CAG to identify the attributes of a good group and collect their responses. What makes a good group? Some answers could be: *be respectful, listen, respect time*. Use these attributes to identify the way the group should act. For example, "*respectful*" can be used to establish the norm of not talking over one another. Once the list is exhausted make sure the group is satisfied with the norms they have developed and explain to the CAG that this is a list of how each of us should act any time they are in this meeting space. The CAG should also assign themselves specific roles and responsibilities for ensuring the entire group is able to complete all the DESIGN workshops.

### How does development happen in your village?

In order to discuss our future projects, we should find out how development projects have previously happened in their village.

Ask: What external NGO Projects have taken place in the village?

- "When was the project implemented?"
- "How was the project implemented?"
- "Who led the project implementation?"
- "Who did the project target?"
- "What change did this project create?"

Capture all this information in the form of a table on your flipchart paper. Follow any discussion that may come from it!

### Introduction to DESIGN

- **Explain DESIGN**

- Introduce the output of the whole DESIGN phase: a project plan, ready for implementation. Say, “In this series of exercises we will design and test a solution to the challenge the community has identified.” Say that we will do this through a process that helps us:
  - i. understand the challenge better,
  - ii. define what the problem is,
  - iii. test how we will solve that problem,
  - iv. plan how we are going to address the problem.
- “Each session builds into the next. The learning from one day carries on to the next day. This is why it’s very important that you attend each step.”
- Say, “When we reach the final workshop, we will have a project plan and we will begin to implement the project in your community.”
- **Present the graphic of the steps in DESIGN**
  - Examine the different steps and the pictures that accompany them.
  - Ask the CAG if they understand the meaning behind the pictorial representations of each step.
  - Identify the skills and output from each step that the CAG will be learning.
- **Create an idea store**
  - Label a piece of flipchart paper as “Idea Store” and tape it on the wall of the training space.
  - Ask what the purpose of a store is: It is to save items for use later on.
  - Explain that DESIGN will need a lot of good ideas from each member of the CAG. Sometimes, ideas might come forward that are good to explore, but aren’t applicable to the current topic.
  - Tell the group if an idea comes that is not on topic, we can put it in the store to access later.

### Stories of Personal Experience with the Priority Challenge

Ask the CAG the questions from the priority challenge, the need the community had previously identified. In other words, the problem that the project we design will solve. Facilitate a discussion around each response. Make sure that every story has a chance to be heard in the allotted time, so keep the discussions moving briskly. Take the time to dig out more relevant details as it relates to the priority challenge. The stories can also be focused on how the priority challenge affected family and friends too. Keep the mood reflective. Take thorough notes on flipchart paper.

If the level of discussion isn’t going deep enough, ask follow up questions to help CAG bring out root causes of the problems: *Why do you think that happened?* If need be appeal to emotions: *How did you feel at the time?*

### Wrap-Up

Ask for some brief reflections on today’s session. What did you learn? What surprised you?

## DESIGN Step 2: Understand

### Objectives:

- CAG understand wellbeing in their village
- CAG understand interconnected nature of wellbeing in their community
- CAG have grouped the personal impact stories into individual problems
- CAG can indicate type of information needed to collect for research on problems
- CAG demonstrate increased awareness of Priority Challenge

### Materials:

Flipchart, markers, grouped “Problems” on flipchart paper, Wellbeing Graphic

**Participants:** Community Action Group

**Duration:** 2 Hours

**Location:** Training Space

### Introduction

Welcome the group, energize, briefly review the key concepts from the last session and go over today's agenda.

**Human Chair:** This is a fun exercise to illustrate the concept of wellbeing. The goal of this exercise is that in small groups the participants will form a sitting platform with their arms. *How to: Outstretch your right arm. Put your left arm at a 90-degree angle and hold on to your outstretched right arm. Your partner should do the same. Now, with your right hand grab onto your partners left arm, while your partner grabs onto your left arm with their right hand.*

- Divide the participants into groups of three
- Tell each group that two of them need to find a way to make a chair for the third person.
- Allow the groups to see if they can make the chair on their own
- If none have succeeded, explain how they can do it by demonstrating a human chair with one group.

### Wellbeing

#### Introduce “Wellbeing”

Ask the group what “wellbeing” means to them and spend some time collecting answers from the group. After sometime, explain that wellbeing means different things to different people because wellbeing is not just one thing, it is several things.

One way to think about wellbeing is as a relationship that is interconnected between different states of being: between the personal and the social, the material and the spiritual.

#### Show the graphic of wellbeing

Using the illustrated graphic (Annexe Step 2: Understand – Wellbeing Graphic), show the four aspects of wellbeing:

- Material: “In your hand”
- Spiritual Quality: “In your heart and mind”
- Personal actions: “What you do”
- Social Settings: “Where you do it”

Emphasize the importance of the lines of interconnection between those four aspects of wellbeing and demonstrate that wellbeing is found in the middle of this interrelationship.

**An example of “wellbeing”**

Example 1: When your farm is supplying enough food for your family.

- Personal Action: Farming
- Material: Food, sufficient crops
- Setting: Farm
- Quality: Being Healthy, Hopeful

Example 2: When your business is doing well.

- Personal Action: Trading, business
- Material: Money, items
- Setting: Market
- Quality: Financial security, confidence

**An example of “Lack of Wellbeing”**

A problem can also be shown to affect these four areas of wellbeing. The “Lack of Wellbeing” can also be identified if we look at the problem through these areas.

For example, lack of a toilet is a problem. But why?

- Physical Material: No sanitation facility
- Personal Action: Open Defecation
- Social Setting: Unclean environment
- Spiritual: Unhealthiness, shame

**Demonstrate the necessity of the interconnected model of wellbeing**

Ask for a volunteer group to demonstrate the Human Chair. While they have their hands connected explain what each arm represents:

“Sao’s left arm is the physical materials, his right arm is the personal actions; Baidu’s right arm is the Spiritual Qualities, her left arm is the Social setting.”

Break apart one of the arm links and ask the group if the chair works. Explain that this is the same as with Wellbeing or Problems. There is a complex interrelated relationship between each aspect and if one part is not functioning there isn’t wellbeing.

**Describe wellbeing in your village**

Lead a discussion about wellbeing in the CAG’s village by asking the following questions:

- Are there any aspects of your village as it is now, that you feel is an example of wellbeing?
- What is positive in your village life that exists in relationship with other positive areas?

## Present “Problems”, Group Them Accordingly

Review the stories that were shared in the last session. Help the CAG to identify common themes that link various stories. Once you have identified several common themes, get a group consensus.

## Research Assignment

Ask participants to form into groups equal to the number of identified themes. Explain that we want to understand more about these problems. Each group is to learn more about their assigned problem and come to the next session with answers to this question: *“How does it affect the wellbeing of the community?”*

### **Research Protocol**

Explain that there is a protocol to surveying people, even if they are your friends and neighbors. For each discussion CAG’s should use the following steps:

- Explain what this information will be used for.
- Seek their consent.
- Be respectful. They have valuable information for us, ask for it politely. Don’t demand it!

### **Research Planning**

Lead a discussion on where the group can get answers to the above question.

Allow each of the groups to come up with a plan that details:

- Who will ask questions?
- Who will they ask the questions to?
- When will they ask these questions?

## Wrap-Up

Ask for some brief reflections on today’s session by asking the following questions:

- What did you learn?
- What surprised you?



## DESIGN Step 3: Understand Better

### Objectives:

- CAG identify a single Priority Problem
- CAG present local research on a particular problem
- CAG have learned new information on the community's priority need
- CAG have identified a single priority problem to focus on

### Materials:

Flipchart, markers, Graphic Calendar, research from CAG

**Participants:** Community Action Group

**Duration:** 2 Hours

**Location:** Training Space

### Introduction

Welcome the group, energize, briefly review the key concepts from the last step and go over today's agenda.

### The “E” Game

Divide the CAG into four and have them stand at four different points around the meeting area. In the middle, present a shape of an E on the ground. Ask the following questions:

- What do you see?
  - While one group will see an E, others will see W, others will see M, others will see a 3.
- Why does each group see something different even though it is the same thing? And what does it mean?
  - These different perspectives show that there cannot be one particular viewpoint that should be relied on more than others.
- Why is it important to pay attention to these different perspectives?
  - a. It's important we look at all angles of the issue.

### Present Research Assignment

Last session, the CAG's were divided into groups and asked to do research on **“How does it affect the wellbeing of the community?”** Have each group take five minutes to present what they have learned. Take notes on flipchart.

### Share Relevant, Local Knowledge

Use this time as the facilitator to share any relevant information about the problem along with information gathered in the **Community Level Baseline data**. If you notice that the CAG is not identifying particular needs, now is the time to illustrate their effects. Be sure to illustrate elements that directly impact the wellbeing of the community.

### Review Needs and Wants (If Necessary)

Assess if the CAG is being driven by wants and not needs in their decisions. If they are, facilitate a discussion on the topic:

#### Needs Vs. Wants

- Explain the difference between a “need” and a “want”. *Satisfying a “want” is immediate, addressing a “need” is long term.*
- Ask everyone, “Why do you think you need your shoes?” Get the group to list the reasons they need shoes: *To protect your feet, to be able to walk far distances, to keep your feet clean.*
- Say, “We need shoes, but we want fancy shoes. Can anyone else identify a ‘need’ versus a ‘want’?”

### Identify the Priority Problem

Facilitate a discussion on all the research presented by asking the following questions. *Emphasize that we ARE NOT already selecting a project. At this stage we are trying to understand the need better.*

- To improve the wellbeing of the community, what problem do you think is a priority?
- What problem would you have more control over? What problem, if addressed, would create the biggest positive impact?
- Ask the CAG to select a single problem to analyse in the next step.

### Wrap-Up

Ask for some brief reflections on today’s session. What did you learn? What surprised you? Prepare the group for the next day where they will construct a detailed problem tree together.

## DESIGN Step 4: Understand Deeply

### Objectives:

- CAG identify a user focus to impact in the project
- CAG complete a detailed problem tree on the priority problem
- CAG know at least three core causes of the priority problem
- CAG create a Problem Statement to guide the project

### Materials:

Graphic Calendar, flipchart paper, markers, scissors

**Participants:** Community Action Group

**Duration:** 2 Hours

**Location:** Training Space

### Introduction

Welcome the group, energize, and briefly review the key concepts from the last session and go over today's agenda.

### Create a Problem Tree

Using the priority problem identified during the last session, create a problem tree. *Note: As the facilitator, make sure that the tree follows the flow of logic. An effect must tie directly to the effect before it; a cause must follow the cause before it. Consult the annexe for more information on how to construct a problem tree.*

- Gather all the materials needed for the Problem Tree. Write the core problem and place it on the ground.
- Review Problem Tree Methods with the group.
- Place the effects. Follow one branch at a time.
- Place the causes. Follow one root at a time. *Analyse each of the causes very deeply.*
- Help the group identify at least three deep, core causes to the Problem Tree.

### Decide on "Users"

Present the concept of "Users" to the group. Users are the people most affected by this problem, the people who need to 'use' our project. By thinking of WHO we want to help, we can better figure out HOW to help."

Lead a discussion with the group:

- Who is most affected by these causes and effects of the problem?

Dig deep in this discussion to try and get the CAG's to really narrow down and get very specific on the type of user. *For example, do not just settle on "women", try and be more specific when it comes to a user like, "Mother".*

### Create a Problem Statement

Ask the group to determine what the User needs, based on the core causes that have already been identified. Try to define the need that sums up the core causes and is action oriented. For example, “Pregnant Women (user) need to deliver in a safe environment” or “Children need to drink clean water”. A Problem Statement will look like this: **(Community and/or Users) need to (action)**. The “Action” should be something that Corresponds to (1) the priority need the community identified, (2) corresponds to the problems the CAG have already identified, and (3) corresponds to a particular behavior that will create an improvement of wellbeing (or limit a negative impact on the community’s wellbeing). *Don’t worry if the problem statement is rough, it can be refined later.*

### Wrap-Up

Explain that you will be refining the “problem statement” that will be shared with the community. The program officer and the CAG’s should meet briefly prior to the community meeting to review the problem statement before it is presented. Tell the CAG, that in the next session they will be divided into two groups and be given time to present a “role play”. The role play will be based around the users’ experience with the problem. Encourage the CAG to share the Problem Statement widely so they can hear from community members their own idea of a solution to the problem statement.

## DESIGN Step 5: Present Problem Statement (Community Meeting)

### Objectives:

- Community understands and endorses the Problem Statement

### Materials:

Problem statement on flipchart paper

### Reminder:

The CAG should be aware of, and give their endorsement of, the Problem Statement before it is shared with the community.

**Participants:** Entire Community

**Duration:** 2 Hours

**Location:** Community meeting space

### Prepare CAG

Before presenting the Problem Statement to the community, meet quickly with the CAG to review the Problem Statement. Make sure the group is unified behind the Problem Statement.

### Introduction

Dance and energize the group. Remind the community of the priority need they identified previously.

### Present “Wellbeing” to Community

- Explain how the CAG have been looking at the priority need through their own experience and through the concept of “Wellbeing”.
- Demonstrate the four aspect of Wellbeing: Spiritual Qualities, Materials, Personal Actions, Social Settings.
- Demonstrate how they are interconnected.
- Demonstrate the Human Chair.
- Ensure they understand the interconnected, holistic nature of wellbeing.

### Present the Problem Statement

After presenting the problem statement, see if the community understands it well enough. See if they have further questions or insights about the problem statement.

## DESIGN Step 6: Empathize

### Objectives:

- CAG have a heightened understanding of the problem  
CAG have identified positive deviants: local community members who have tackled the core problem already

### Materials:

Graphic Calendar flipcharts, markers

### Reminder:

Have scenarios for the role play already prepared!

**Participants:** Community Action Group

**Duration:** 2 Hours

**Location:** Training Space

### Introduction

Welcome the group, energize, briefly review the key concepts from the last step and go over today's agenda.

### Review the Problem Statement

Review the problem statement. Reiterate that we will be holding to this Problem Statement to guide us.

### Role Plays

Divide the group into two. Explain that each group will be taking a different scenario focused on the user confronting the problem and develop them into role plays. Guide the groups to assign characters and motivations to the different CAG members. Try to get everyone involved in the role play planning and make sure everyone understands the point behind their particular role play scenario.

Present role plays to the other group, and have fun!

### “How Might We?”

Once each group has had a chance to perform their role play, lead a discussion by asking the following questions and recording notes on a flipchart.

- What did you see happen in these plays?
- How might we help the users overcome this problem?
- How might we have helped the users avoid that problem?

### Introduce Positive Deviants

Now that we have examined the problem from the users' perspective, we can start to look at real life solutions to it. There is a lot of knowledge inside the community, so there could be solutions to the problem statement already in the village. Ask, “Are there solutions to the problem already in the community?”

Explain to the group that they should investigate individually to find if anyone they know has already addressed this particular problem we are examining. This person is a “Positive Deviant”, they are doing something positive that is different than the normal behavior. Tell the CAG to invite these Positive Deviants to the next session, or if they can’t make it, ask their permission to share their story with the group.

### Wrap-Up

Ask for some brief reflections on today’s session. “What did you learn? What surprised you?”

## DESIGN Step 7: Problem Solving

### Objectives:

- CAG can identify local solutions to the problem statement
- CAG can identify externally-sourced solutions to problem statement
- CAG are have analyzed both local and external solutions to the problem statement

### Materials:

Graphic Calendar, flipcharts, markers, problem statement, relevant solutions

### Reminder:

- A consultant might be necessary for this session
- Program Officer should research and be ready to present approaches to the problem statement in clear language

**Participants:** Community Action Group

**Duration:** 2 Hours

**Location:** Training Space

### Introduction

Welcome the group, energize, briefly review the key concepts from the last step and go over today's agenda.

### Review Wellbeing

It is important to remind the group that this project we are designing is intended to improve the overall wellbeing of the entire community. Review the wellbeing graphic with the group.

### Positive Deviants Story Sharing

Either give some time for the “Positive Deviants” to share their local solutions, or CAG will share examples from Positive Deviants experience. Take notes on the flipchart.

### Introduce Relevant, Tested Solutions

Share some specific solutions to the Problem Statement that you have found in your research. The examples you bring could be broader than the problem statements, but stay focused.

*Note: This might be an opportunity to hire an expert to speak to the group on their problem statement. Make sure the expert's talk is concise, easy to understand, and on topic. If the nature of the expert's talk is too complicated it will be less accessible for the CAG. Facilitate the experts knowledge.*

### Wrap-Up

- Ask, “What do you think about the solutions presented here today?” Prep the group for brainstorming in the next session



## DESIGN Step 8: Brainstorm

### Objectives:

- CAG have many ideas for addressing the problem statement
- CAG narrow and filter some ideas to be addressed

### Materials:

Graphic Calendar, flipcharts, markers, outputs from the positive deviants and new solutions from last session, scrap paper to draw on, pencils

**Participants:** Community Action Group

**Duration:** 2 Hours

**Location:** Training Space

*Note: This is a session that could benefit from extra community members. Are there any community members knowledgeable about the project area? Are there any of the targeted users that could add good insights?*

### Introduction

Welcome the group, energize, and briefly review the key concepts from the last session and go over today's agenda. Review in detail the output from the last step – Problem Solving

### Envision Solving the Problem: Impact

Ask the CAG to take a moment of contemplation to think about what the future might look like. Ask:

- What does solving this problem look like?
- What does your village look like after this project has solved this problem?
- Ask the CAG to describe the end-state or what their community looks like in detail.

Following the description, explain that this is the *impact* that they want to make happen with this project. They should keep the impact that they have described in mind when brainstorming a solution.

### Review Problems and Causes, Create Solutions

- Review all the positive deviants and new solutions introduced. The review of the previous session's ideas should stimulate and inspire new ideas among the CAG.
- Review the Problem Tree (they created in DESIGN Step 4y). Ask for the opposite of that core cause. What does it look like when this problem is turned into a solution? How might we turn these negative causes into something positive solutions?
- Ask the CAG how the effects of these solutions would be felt? Ask the CAG to keep this in mind as they are brainstorming their project.

### Brainstorming

There are many ways to brainstorm and encourage the CAG's creativity. Some methods include drawing, building and discussing.

Break into small groups and ask the groups to come up with as many ideas for a solution as they can. These ideas can be fully formed or small pieces of an idea. Move among the small groups and listen,

encourage, and help coalesce some of the fragments into a unifying idea. This will require you to think on your toes and reflect immediately. This is why there is no instruction in this section. Instead, keep the following tips in mind:

- Stay focused on the problem statement.
- Ask again, “How might we...?”
- Generate as many ideas as you can! The wilder the better!
- Don’t talk over each other.
- Ensure everyone has a chance to speak. *Especially women!*
- Use the idea stores.

***Note: Make sure you consult the ACT Flowchart to help guide all brainstorming (Annexe Step 8: Brainstorm – Decision Flowcharts).***

### Narrowing Ideas

- Once the groups have exhausted their brainstorming, find similarities between the ideas and group them by consensus.
- Help the CAG to settle on a core idea that effectively addresses the problem statement and improves the wellbeing of the community. This can be a structure or activity.
- Tell the group that they will create a “prototype” of this core idea in the next session.

*Note: It’s okay to have more than one idea to prototype.*

### Wrap-Up

Reflect on the brainstorming output from today. Encourage the group to continue brainstorming between now and the next session.

## DESIGN Step 9: Prototype

### Objectives:

- CAG develop a testable project prototype to address the problem statement
- CAG are able to identify the meaning of sustainability
- CAG understand the long-term use of the prototype(s)

### Materials:

Flipchart paper, markers, scissors, glue, scrap paper, pencils crayons, cardboard, sticks, pre-idea for prototype, storyboarding materials, and Legos (if available)

### Reminder:

- The prototype can be rough in session; refine it later

**Participants:** Community Action Group

**Duration:** 2 Hours

**Location:** Training Space

*Note: This session is most useful for those prototypes based around individual structures. However, the learning and discussion tools are equally relevant to all prototypes. Feel free to improvise the “Realize a Rough Prototype” section to suit the group’s needs.*

### Introduction

Welcome the group, energize, briefly review the key concepts from the last step and go over today's agenda.

### Sustainability

#### Introduce Sustainability

Lead a discussion with the group around sustainability by asking the following questions:

- Which is a better path, the one that is often travelled or the one that’s hardly travelled on?  
Why?
  - *The path that is often travelled on is better because people have made the path very clear from walking on it, people are removing branches, people are weeding the sides of the bush.*
- Why does increased use of a project mean that it will last longer?
  - Because people find importance in using it so they will care for the project longer; because people will see the impact of the project if they use it more often and that will make sure they continue to have that benefit.
- What projects have not been successful in your community? Why do you think they failed?
- How can we make sure any structures connected to this project will last?

#### Environmental Sustainability

For villages with a rapidly growing population, the environment, including, the gradual shrinking of available land, and the health and yields from their soil, is of primary importance. Environmental Sustainability is a priority to CAG, even if they don't recognize it in such terms.

Lead a discussion on the Environmental Impact of the project on the village:

- What are the negative impacts on the environment with this project? How can we avoid them?
- What are the long-term environmental impacts of this project? What can we do now to avoid them in the future?

*For example, if we are developing a latrine design, discuss how far away latrines should be placed from houses, and how will this impact people's ownership of plots of land? If we are building a large structure, what is the impact on using the land in this way? Are there types of trees that we will have to cut down that do not grow back quickly?*

## Realizing a Rough Prototype

### **Introduce the concept of a "Prototype"**

Explain that a prototype is a chance for us to look at an idea from all angles so we can improve it. It is not a final product, but instead a first expression of the project. To make a prototype, anything at our disposal can be used. For example: *Drawing a single structure or drawing a storyboard, creating a model, building with some Legos, or acting out the projects in use.*

### **Create Prototype**

Allow enough time for the group to create their first prototype.

### **Edit the prototype**

As the facilitator you may have a different view point from the CAG's and you should ask questions and challenge designs. For example, if you see parts of this prototype that are unnecessary or probably going to add significantly to the budget, start to ask questions about why these items are necessary and try to get the prototype down to something that might be more feasible.

Once the prototype is complete lead a discussion by asking the following questions:

- Is it desirable to the community?
- Is it feasible?
- Is it viable and sustainable?
- Is it motivated by what is good for the community?

## Draft Budget

Remind the CAG of the total budget of this project. Introduce the basic components of a budget to the CAG: *Item, Quantity, Unit Price, Total*. Explain how this is used to calculate amounts.

Looking at the various components of the prototype, create a draft budget for each item. At this time there is no need for it to be accurately priced, just round up or down. Try to get a sense of how much this project is going to cost and if it will fit into their budget.

### Wrap-Up

Ask the group to reflect on today's activities: Does having your ideas in some sort of physical form make your ideas seem more real? Was there anything surprising when you thought about the use of the project? Ask the CAG to invite a select group of users to tomorrow's session.

## DESIGN Step 10: Test

### Objectives:

- The prototype is endorsed by the user focus group  
CAG can identify at least one way to improve the sustainability of the project
- CAG have identified areas of sensitization around the project

### Materials:

- Graphic Calendar, flipcharts, markers, Community Action Flowchart, refined prototype

### Reminder:

- Have a refined prototype prepared for this session.
- Ideas for sensitization. By now you should have an outline in your mind of an effective plan for this project.
- Make sure a select group of users are invited previous to this step.

**Participants:** Community Action Group, Users

**Duration:** 2 Hours

**Location:** Training Space

### Introduction

Welcome the group, energize, briefly review the key concepts from the last step and go over today's agenda.

### Introduce Refined Prototype

Present the refined prototypes that you have prepared (if needed) and explain the ways that you refined the prototypes and why. Ask the group for feedback and if the prototype still portrays their ideas before moving forward.

### User Feedback

Have the CAG explain the problem statement to the users and ask the users to talk about if they have had a similar experience with the problem and what knowledge they have regarding the statement.

### Demonstrate the prototype and identify barriers

Have the CAG's demonstrate the prototype and lead a discussion with the users by asking the following questions:

- What do you like about the prototype?
- What don't you like about the prototype?
- How would you make this prototype better?
- What is a barrier to using this prototype? How might we help people overcome this barrier?  
How might we help people avoid this barrier all together?

### Examine Long Term Use

Lead a discussion with the group around the long term use of the prototype. Use the following questions as a guide:

- What do you think the project will look like after 1 year? What will decay?
- What will happen during times of heavy use?
- When would the project get less use?
- How can we make this prototype last longer?

To help organize these thoughts from the group begin to chart the use over time. A *calendar* can be created to help visualize usage or *storyboard* to show how people could interact with the prototype over a period of time.

### Final Critique of Prototype

Dismiss the users and introduce the Community Action Flowchart (Annexe Step 8: Brainstorm – Decision Flowcharts) to the CAG and follow the course of questions on the flowchart about the prototype. Is the project a good project?

If not, see what aspect of the prototype and its associated activities could be changed/adapted to improve the project and ensure it is a good project.

### Wrap-Up

Ask for reflection on today's activities. Prep for the presentation of the prototype the next day in a community meeting.

## DESIGN Step 11: Present Prototype

### Objectives:

- Community members have endorsed the prototype
- Community members are knowledgeable about the prototype

### Materials:

Prototype, flipchart

### Reminder:

- Demonstrate the prototype in simple terms; don't get too technical

**Participants:** Entire Community

**Duration:** 1 Hour

**Location:** Community meeting space

### CAG leads process; officer guides

#### Introduction

- Energizer and Prayers

#### Demonstrate Prototype

- Review the problem statement with the community.
- Explain that to address the problem statement the CAG have developed a model to demonstrate our solution.
- Present the prototype in full. *If there are two or more prototypes, get the community to choose their priority prototype.*
- Detail all the relevant dimensions of the project.
- Present the relevant actions and behaviors that correspond to the project.
- Explain that next steps are to fully budget to see if this project is possible or not, so more changes will come.
- Answer any questions or concerns that might come from the community.



## DESIGN Step 12: Set Objectives

### Objectives:

- CAG understand goal setting
- CAG have completed an Objective Tree, including Activities, Output, Outcomes and Impact for their project
- CAG have classified Objectives and Outcomes into relevant categories for the creation of monitoring Indicators

### Materials:

Graphic Calendar, flipcharts, markers, wellbeing graphic, potential goals for projects, graphic on Activity, Output, Outcome, Goal

### Reminder:

Have a good sense of what the objective tree could already be before the session. Remember you need to guide the group, so it is critical you fully understand the Objective Tree beforehand.

**Participants:** Community Action Group

**Duration:** 2 Hours

**Location:** Training Space

*Note: This session could take two days. Consider splitting the session after “Define Goal.”*

### Introduction

Welcome the group, energize, briefly review the key concepts from the last step and go over today's agenda. Ask the CAG to recall the progress up to this point. Explain that we are now in a section of DESIGN that will identify what the long term impact of the project will be and how we will reach it.

### The Goal

Lead a discussion to define Goal. Start by asking the group:

- When you send your children to school, what do you hope will happen in the future?
  - *They can perform well in school and get a good education.*

Explain to the group that their responses are the Goal of their children going to school. The Goal is the long term change that you want to see.

### What is the Goal of your project?

Ask the group to think back to before they began brainstorming and remember the vision of what their community looked like when the problem was solved. Share their individual visions with the group. Ask the CAG to keep these visions in mind as we define the goal.

## The Objective Tree

Show the Objective Tree Graphic (Annexe Step 12: Set Objectives – Objective Tree). This will help us see the impact of the work that we are doing in this project. Explain an Objective Tree in more detail using the following imagery to highlight the different aspects of the tree: Activity, Output, Outcome, and Goal.

- Activity: An activity is *the seed*. It is planted into the soil, then it must be watered. What happens because of that?
- Output: *A seedling emerges*. To cultivate the seedlings growth, we have to weed around it. If the Seedling can grow properly it becomes a sapling.
- Outcome: *A bush or a sapling*. A sapling will not immediately become a strong tree though. Branches need to be pruned so it grows straight and tall.
- Goal: *The tree* represents the goal once it has fully matured.

Explain that each of these steps requires that additional action be taken to make it to the next step. So too for the project! We must be vigilant with the project, much like a small plant. We cannot expect the impact to come from just completing one of our activities.

## Complete the Objective Tree

### Introduce Activity->Output->Outcome->Goal

Ask, if we do an Activity, what will we *have* immediately? (Output) The Output is a product or a service that's immediately obvious and tangible. If we have that output, what *will happen* then? (Outcome) The Outcome is a benefit that the activity has brought about, a short-term change. The Goal is the long term impact, something we won't see immediately, maybe not for years, but it is the ultimate change we want to see happen.

- **If we do this (Activity), then what will we have (Output). And if we have that, then what will happen? And if that happens, what change will eventually take place (Goal).**
- Share the following examples:
  - *Latrine Project*: If we build latrines (*activity*), then the community will have latrines (*Output*). If they have latrines, then they will be able to use them to defecate safely (*Outcome*). If they use them to defecate safely, there will be less spread of disease in the community (*Goal*).
  - *Education Project*: If we improve children's reading skills (*activity*), then the children will have better reading skills (*output*). If the children have better reading skills, they will be able to understand their subjects better (*outcome*). If they can understand their subjects better, they will perform better on national exams (*Goal*).

### Identify Activities that will help us achieve our Goal

Lead a discussion to identify specific activities that relate to the goal of the project by discussing the following questions:

- What are we doing with this project? What are our activities? *In simple terms, like "build a latrine."*

Review any actions that you've discussed in the Brainstorming and Problem Solving steps, and lay out your actions along the "Activity" level of the Objective Tree.

*Note: Remember to consult the ACT Flowchart if the group is unsure of a particular activity's effectiveness. Identify the behavioral actions too: education or behavioral promotion. Put actions in phrases that are based around a single particular action like: "Build Latrines" "Community Members Wash Hands" "Provide training."*

### **Ask "Why?"**

For each of the activities, get the rationale behind it from the CAG. If they cannot answer why a specific activity is being done, or what problem it is solving, it does not have a strong rationale and should be removed.

### **Identify what the CAG believes to be the main activity**

Ask the CAG, "What is the activity that is the most crucial activity to this project?" Once you have identified the main activity, continue the discussion. *As you are discussing be sure to remind the group of the tree analogy:*

- If we do this activity, then what do we have?
- If we have that output, then what will happen?
- If we have this outcome, what will be the impact of that, or rather, what will be the goal?

Complete the rest of the objective tree, starting from the Activity and moving up. Don't worry about having it 100% correct right now, encourage as much involvement from the CAG.

*Remember: You can combine outputs and outcomes from individual activities, not every activity needs its own output and outcome.*

### **Define the Goal**

Allow some debate over the Goal, but show it has led directly from our activities we laid out. There should be a strong link between the goal reached by charting the Objective Tree and the vision they had described as the "end state" at the beginning of the session. This should help the group reach a consensus on what the goal of the project is.

## **Classify Outcomes and Outputs Into Categories**

Introduce categories of indicators used for project monitoring:

- Education
- Knowledge Change
- Access
- Behavior Change
- Sustainability

Explain that our outputs and outcomes will fall into these categories. Use the below examples to demonstrate the progress from one category to the next. Present the pictures of the following, but not in order. Get the CAG to arrange the pictures in the correct order of the story below. Once it is arranged, identify each picture with the correct indicator category.

- To become a football player: First you watch football to see how to play, then you learn how to play (Education), then you know how to play (Knowledge Change), then you get a football

(Access), then you start playing football regularly (Behavior Change), then you have played on a football team for over a year (Sustainability).

- To be a bicycle rider: First you learn how the bicycle works, then you learn how to ride the bike (Education), then you know how to ride a bike (Knowledge Change), then you get a bicycle (Access), then you ride your bicycle to town instead of walking (Behavior Change), then after six months, your bicycle is still in working order and you are riding it every day to town (Sustainability).

Demonstrate how the above examples show a “story” by building one activity on the other (Education-Knowledge Change-Access-Behavior Change-Sustainability). Using the table (Annex Step 12: Set Objectives – Examples of Categories), classify all objectives from the objective tree into the category which will later be used for indicators (Education, Knowledge Change, Access, Behavior Change, Sustainability).

*Note: You are not creating indicators at this point, just classifying the outputs and outcomes into the categories. This will help the CAG’s to see the link between objectives and monitoring indicators later on.*

Use the following questions to help CAG’s place the objectives into indicator categories:

- What do we need to teach people so that our goal can be reached? (Education)
- What do we want people to learn so that our goal can be reached? (Knowledge Change)
- What do people need access to in order to reach the goal? (Access)
- What do we want people to do differently in order to reach the goal? (Behavior Change)
- How can we make sure the goal stays met for a long time? (Sustainability)

Keep this classification of objectives with the objective tree. Bring this table back for further discussion and refinement during “Plan Monitoring”. This discussion on categories of the objectives might help the group refine their objective tree as well. Be prepared if you need to revise it.

### Wrap-Up

Ask for reflection on today’s lesson. Ask, “How do you think this goal will positively impact the community? How will we know if we have achieved our goal?”

## DESIGN Step 13: Budget

### Objectives:

- CAG create a realistic budget for the project
- CAG have identified the long term use of the project
- CAG have identified barriers to use of the project

### Materials:

Flipchart paper, markers, yesterday's work, storyboards, prototype, materials for examining long term use (tables or calendars)

### Reminder:

- Be ready to put the prototype into items and components. Have the pricing for any potential items already done. **Do a trial run on your own of the budgeting** because you don't want to miss anything and it will help you guide the process better.

**Participants:** Community Action Group

**Duration:** 2 Hours

**Location:** Training Space

*Note: This session is especially geared towards project designs with a heavy construction focus. However, all project designs can be analysed through the discussion tools in this section.*

### Introduction

Welcome the group and briefly review the key concepts from the last session and go over today's agenda.

### Budget the Prototype

Review the budgeted amount for this project. Using the Budget Tools (Annexe Step 13: Budget – Budget Tools), ask the group to break down the prototype into individual items that need to be budgeted:

- Take the largest of the items; price it. Identify a rough idea of of the quantity that will be needed. Multiply the quantity x the price and put in the total row.
- Move to the next item of importance; repeat the step
- After pricing the items, sum all the items to create a total.
- Identify the materials that need to be transported. Budget the **Transportation** amount for each item needed from outside the village.
- Budget the **Skilled Labour** payment that the CAG thinks is fair.
- Finally, ensure that there is a 10% **Buffer**. Explain to the CAG why a buffer is critical for their project success. There might be unexpected expenses that we can't anticipate.

*Note: Help the CAG realize that there is an interconnection in the budget too. By paying more for skilled worker, you will have less for materials. If you spend more on individual designs, you'll have less money for more structures.. Make sure the Budget is in line with the amount for the project.*

### Sustainability: Financial

Review the group's understanding of sustainability and lead a discussion on financial sustainability:

- Now that we have a budget, is this a project that can be maintained by most people in this village? *For example, a latrine is a necessary part of everyone's household, but they cannot rely on an organization to build it for them, they must do it themselves.*
- From wellbeing we know that everyone's wellbeing is tied to each other. If families in the future do not continue to implement this project, the impact will be lost. Will this prototype be affordable to future residents?
- If community members cannot afford to maintain or replace this project, should we adjust the amount we are spending on this project?

Make any adjustments to the budget that are needed.

### Wrap-Up

Reflect on today's session; ensure everyone understood the budget process and totals.

## DESIGN Step 14: Plan

### Objectives:

- CAG have a time-bound, clearly defined action plan for project implementation
- CAG have a time-bound, clearly defined action plan for community sensitization

### Materials:

Graphic Calendar, flipcharts, markers, summary suggested sensitization approaches, the Action Plan tool

### Reminder:

Include leadership and skilled workers from the community in this session or any relevant community members (Teachers, Clinic staff, TBA's, Tribal Authorities)

**Participants:** Community Action Group

**Duration:** 2.5 Hours

**Location:** Training Space

*This session is written focused on construction-based Project Designs but is relevant to any project design.*

### Introduction

Welcome the group, energize, briefly review the key concepts from the last step and go over today's agenda.

### Review DESIGN Up to this Point

Take a moment to appreciate all the hard work the CAG has done so far. Briefly review all the DESIGN steps up to here by asking for volunteers to recount what took place in each session and what where the main decisions.

### Create an Action Plan for Implementing the Pilot Project

Use the Action Plan Tool (Annexe Step 14: Plan - Planning Tools) to complete the plan with the CAG.

*Remember: The Community Always Takes the First Step.* Explain, that the plan, like all plans, can change depending on capacity, the community's mobilization speed and effectiveness, and circumstances outside our control, but the aim will be to follow the plan as closely as possible. *Note: Go slowly and step by step.*

### Crafting the Education Message

#### Identify Incentives

Go through each of the barriers that users have identified for this project by users and CAG. Identify particular incentives to overcome or avoid the barriers. Take time to dig, we are trying to find incentives that will excite people to adapt positive behavior that will help us reach our own goal. *Note: An incentive is anything that encourages one do to do something, but the more intrinsic, or "motivated internally",*

*the more effective and long lasting it will be. Think of how products are marketed locally: What are messages that resonate with local people?*

### **Craft a message**

Once a strong incentive has been identified for each barrier, lead the group to craft an education message. You can use a formula like this *“If you (Positive Behavior), you will have (Incentive)/...will happen. This will achieve (Goal)”*.

For example,

- *“If you wash your hands after using the toilet, you will have a much healthier family”* (Positive Behavior: *“Wash hands after using the toilet.”* Incentive: *“Healthy Family.”*)
- *“If you use the latrine, your compound will smell pleasant and people will be eager to visit you.”*
- *“If you don’t want feces in your food, wash your hands after the latrine.”*

Explain that the key is achieving a large group of people adopting these behaviors. If a large enough group makes this a normal action, then the rest of the community will feel compelled to follow.

Ask: How can we make this message effective to the largest number of people? Who will help us spread this message as widely as possible?

## Planning Education

### **Start thinking about individual targets for education reach and impact**

Lead the CAG to think about how many people they think they can reach individually with these education messages. We don’t need to know now, but we want them to start thinking of this.

### **Pilot education with the family**

Have the CAG pilot the education plan with their family. Using the education messages crafted today, see if they can convince their family to learn from these education messages and adapt their behavior. In the next session, CAG will report how successful they were educating their community members.

## Prepare for Initial Education Presentation

Find out what the CAG believes is the most important thing people should know about this project and create a quick role play around this. Then, plan the rest of the next day’s meeting with the CAG. *Note: the play should not be more than a couple of minutes. If they are not feeling creative, find a way to get their message across through speeches or even a song.*

## Wrap-Up

Motivate the CAG for the next day’s meeting.



## DESIGN Step 15: Presentation of Project; First Education

### Objective:

- Community members understand the impact of the project
- Community members know their own role in the project implementation
- Community members endorse the project plan

### Materials:

Prototype of the project, Action Plan, Budget

### Reminder:

- Let CAG lead, and ensure they have practiced the education messages.

**Participants:** Entire community

**Duration:** 1 Hour

**Location:** Community meeting space

### Introduction

- Prayers and Energizer.

### Present Project

- Review the problem statement and prototype with the community.
- Introduce the community of the impact of the project. Ask, do you think we can achieve this? How?
- Present the education role play.
- Ask, does this help you understand the project better?
- Present the plan for implementing the pilot, or full project
- Present the budget for implementing the project

Make any further arrangements needed with the community around distribution, volunteer labour mobilization, and other particulars.

## DESIGN 16: Plan Monitoring

### Objectives:

- CAG can identify at least 3 reasons why you monitor
- CAG have finalized their monitoring indicators
- CAG have selected a priority indicator
- CAG have set targets for monitoring
- CAG have a plan for educating the community on their project

### Materials:

Graphic Calendar, flipcharts, markers, ideas for objectives and indicators, completed Objective Tree, Goal, and Indicator Table (only objective column filled in)

### Reminder:

Know what the indicators might be in advance. Use the objective classification table to draft the indicator table. Do not show this table to the CAG's. It will serve as a guide to you as you lead the discussion on Setting Targets. Be sure to know the number of households in the community before the session.

**Participants:** Community Action Group

**Duration:** 2 Hours

**Location:** Training Space

*NOTE: This could be a very complex and involved session with the CAG. Consider splitting this session into two days. Break before Set Targets section if you are not sure that the CAG have enough fundamental understanding of these concepts*

### Introduction

Welcome the group and briefly review the key concepts from the last session and go over today's agenda.

### What is Monitoring?

Now that the objectives and goals have been defined and the project has been planned, how will we know when we have achieved it? Monitoring! Monitoring is the process which measures achievement of objectives, outcomes, and impact from the Objective Tree we put together. It lets people know if the community is on-track to meet their goal. It measures if the project is being successful.

#### **Why do we monitor?**

We monitor to find out if we are achieving what we said we would achieve. But sometimes it's not easy to see the whole impact. Demonstrate this concept by leading the following activity:

- Have three CAG stand in a line, with the person in the middle looking at a person with their back to the other CAG
- Have the CAG in the middle do something subtle that can only be seen when facing forward, like winking or smiling.
- Have the person behind the CAG in the middle describe what they are seeing. Ask them, what do you think the other person sees?

- Now have the person in front say what they are observing. Finally, mention the subtle thing the CAG in the middle is doing.

Explain: When we are monitoring we can't rely on one perspective alone. We have to plan on seeing our progress from many different angles to get the full picture. Once we see a full picture we can better improve our project's ability to achieve the goal.

### **Monitoring: a strategy for success**

Explain that marks on a report card are a way to monitor a student's progress in school. Lead a discussion about creating a strategy for success by asking the following:

- What strategy could a parent use if their child's report card did not have passing marks?
  - mandatory studying time
  - going to bed earlier
  - study groups
  - extra classes etc.
- If after some time, the marks **improve**, the parent can be sure that their **strategy** was **successful**.

### **Further examples**

Present the following example and lead a discussion using the questions below. Twenty children were given a week of extra reading classes for one hour a day after school.

Scenario A:

Before the extra classes, only 10 kids got passing marks on a reading test. After the extra classes all 20 kids achieved passing marks on the same reading test.

- What does the monitoring tell us?
  - The extra classes were successful because all the kids are now passing the reading test.

Scenario B:

Before the extra classes, only 10 kids got passing marks on a reading test. After the extra classes only 10 kids achieved passing marks on the same reading test.

- What does the monitoring tell us?
  - The extra classes were not successful because there was no improvement in the overall achievement of the kids on the reading test.

### **Real life example**

Get the CAG to identify the objectives in the following example:

Latrine Project: If we build latrines (activity), then the community will have latrines (output). If they have latrines, then they will be able to use them to defecate safely (outcome). If they use them to defecate safely, there will be less spread of disease in the community (goal).

- What do we need to measure to make sure this vision of success for this project is being met? Break down the parts of the project that need to happen.
  - Build latrines
  - Community has latrines
  - Community uses latrines
  - Safe defecation = no open defecation
  - Less spread of disease

### **Discuss how you know each part of the project is being achieved**

Use those parts to ask CAG's to come up with examples of how they know the project might be a success.

- Build latrines
  - Project implementation, checking how far the construction has gone, availability of skilled workers, materials, etc.
- Community has latrines
  - Count the number of functional latrines in the community
- Community uses latrines
  - Ask community members if they use the latrines
- Safe defecation = no open defecation
  - Look for open defecation sites
- Less spread of disease
  - Parents report less sick children, less cases of diarrhea at the health center, less ORS distributed, Bristol Stool Chart, etc.

Wrap up the discussion by stating that we monitor to:

- see if we are achieving what we said we would achieve
- see the project from different perspectives
- improve the project

Monitoring gives you confidence that the change you wanted to see is happening and highlights areas that still need improvement.

### Turn Objectives into Indicators

Review the objective tree and the table created in **DESIGN Step 12: Set Objective Review** and how the objectives were classified into the categories of Education, Knowledge Change, Access, Behavior Change, and Sustainability. Now choose one objective for each category. They will be measuring those objectives that they measure. Turn the objective into indicators with the CAG's by using the format below:

Objective	Indicator	Target	Data collection Method
Knowledge:			
Access:			
Behavior:			
Sustainability:			

*Note: Do not include objectives from the "Educate" category (targets will be set during the Community Education Plan). See Annexe Step 16: Plan Monitoring – Indicator Sheet for an example.*

Fill in the Indicator column in the table on the flipchart by asking the following category specific questions:

- Knowledge change
  - How will we know if people's knowledge has changed? What types of questions can we ask to check their understanding?
- Access

- How can we check that the core user group has access to the project?
- Behavior change
  - What types of behaviors do we want to change? How will we know if they have changed?
  - What do you expect the community to do differently after the project?
- Sustainability
  - What are some early signs of project sustainability? What would show that the community is committed to keeping the project operational even after OVP leaves? What steps have they taken to achieve this?

Define your indicators further: Each indicator should answer the following “Who?” “What?” “When?” “Where?” “How?”

Who?	Who is being impacted? And then, Who do we need to ask the question to?
What?	What is the impact of the objective? What is the impact on ‘who’ is being impacted?
When?	When will this impact happen? And then, when will we ask this question?
Where?	Where will this impact take place? And then, where will we ask this question?
How?	How can we collect this information? And then, how can we be sure the information we are getting is correct?

### Set Targets

To help the CAG, share context for setting targets, such as the number of households in the community. Not all indicators will be household based. Be careful to remind the CAG’s of the unit for each indicator and how that could affect the target set.

Once you have identified the indicators, set targets for all five indicators. Ask the group, how many people should be doing this for it to be a good sign of progress? Use the terms “**none, few, some, many, all**” to communicate the amount of people or households they want to achieve for each indicator. Before finalizing the targets, review all targets and make sure they are achievable.

### Choosing Priority Indicator

Community projects are often large in scope and address many different needs of the community, so make sure the indicators address all aspects of the project. Have the CAG choose the priority indicator, the indicator that will be the ultimate measure of their success. Review the target they set for this indicator to make sure it is achievable.

### Community Education Plan

Remind the CAG of the education messages and go over the education messages one by one. Get an update on their experiences sharing the education messages with their families. Were they successful? What have you learned?

### Determine the reach

Ask each CAG the number of people they think they individually can reach with their one on one education message

Lead a discussion with the CAG's about how they can reach this total number and beyond. Be ready to ask more questions:

- What is your strategy for reaching this many people?
- How do we impact the most people?
- Who can help us reach the most people?
- How will we encourage people to adopt the positive behaviors?
- What's your plan?

Encourage CAG to support each other's plans and hold them to their education targets and note their individual education strategies.

### Wrap-Up

Ask if there are any further questions and encourage the group to show up for the celebration! Encourage the group, this is difficult work.

## DESIGN Step 17: Celebrate!

### Objectives:

- CAG can name the sessions in DESIGN and the learning derived from each session
- CAG can provide examples for how the learning has impacted their own lives

### Materials:

Graphic Calendar, flipcharts, markers, rice, sauce, bowls and plates

### Reminder:

- None

**Participants:** Community Action Group

**Duration:** 2 Hours

**Location:** Training Space

### Introduction

Welcome the group, energize, briefly review the key concepts from the last step and go over today's agenda.

### Review All Steps

In a fun and interactive way, get all CAG to recall each session and what the outcomes were from each session. Keep it moving quickly but really push them to fully explain what each step was and why it was important. This is a test to see if they understood the DESIGN process well enough.

Lead a discussion by asking the following questions:

- What came from that session?
- How did we use this information to design our project?

### Personal Reflections

- How has the education with their family progressed? Has their family adopted the behavior?
- What strategies have you learned about positively promoting behavior change?
- What have you gained from your experience in DESIGN?
- Do you understand something different about development?

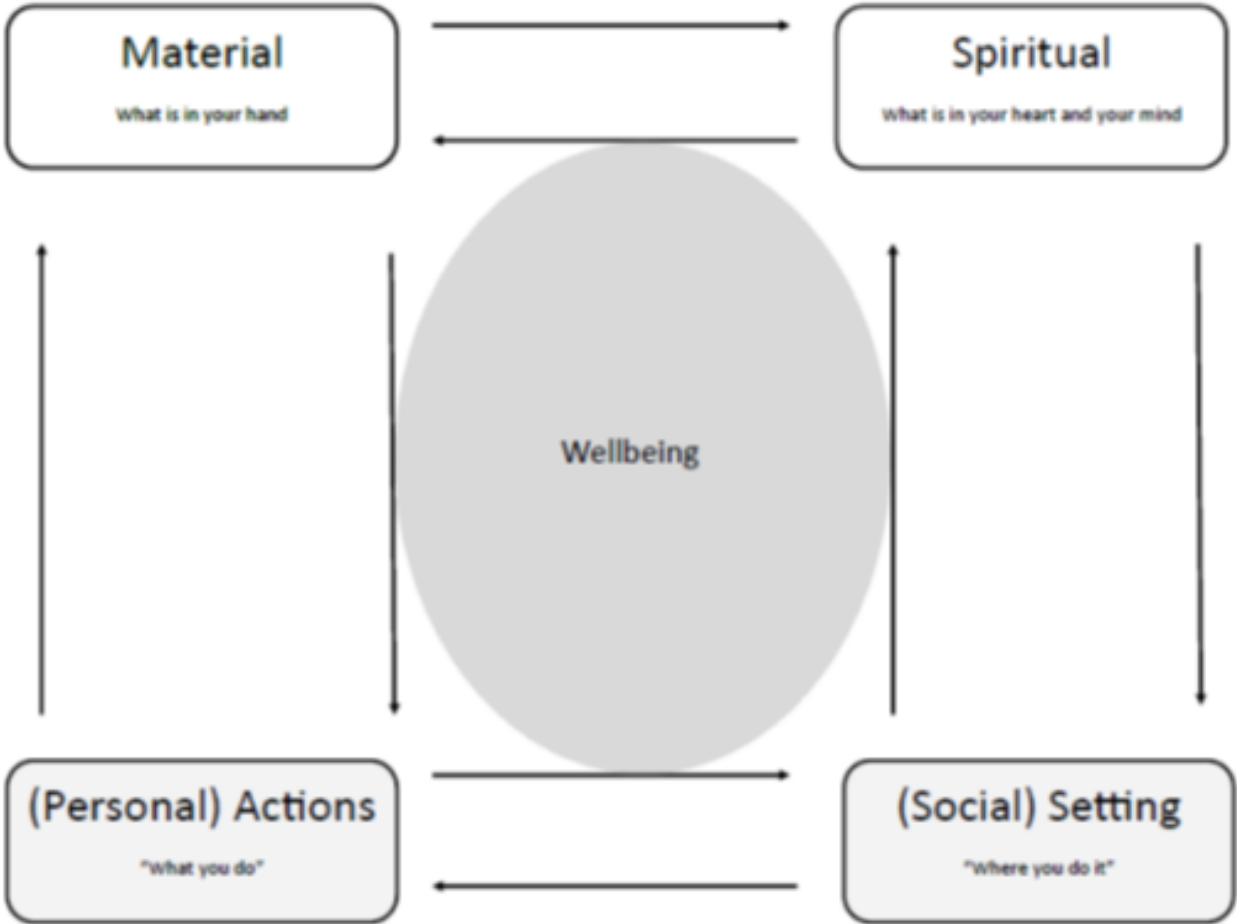
### Celebrate!

Before you begin eating, take a quick moment to share your own personal reflections of the time you've spent with them. Share the way working alongside the CAG has impacted you personally as well. And then celebrate your success!

***"You have designed a project that will improve the wellbeing of your community!"***

Annexe

Step 2: Understand – Wellbeing Graphic





## Step 4: Creating a problem tree

Problem tree analysis is central to many forms of project planning and is well developed among development agencies. Problem tree analysis (also called Situational analysis or just Problem analysis) helps to find solutions by mapping out the anatomy of cause and effect around an issue. This brings several advantages:

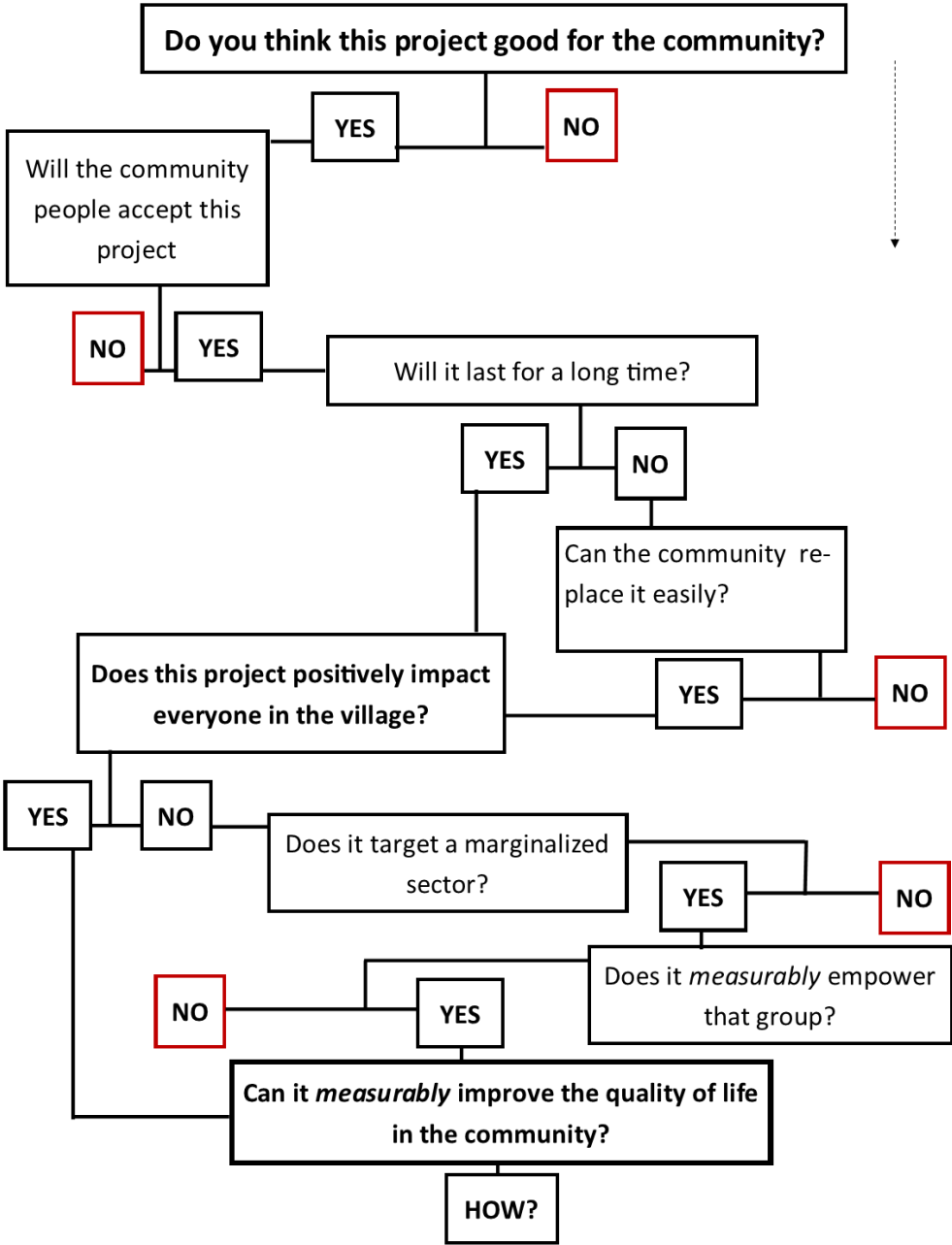
- The problem can be broken down into manageable and definable chunks. This enables a clearer prioritisation of factors and helps focus objectives;
- There is more understanding of the problem and its often interconnected and even contradictory causes. This is often the first step in finding win-win solutions;
- It identifies the constituent issues and arguments, and can help establish who and what the political actors and processes are at each stage;
- It can help establish whether further information, evidence or resources are needed to make a strong case, or build a convincing solution;
- Present issues – rather than apparent, future or past issues – are dealt with and identified;
- The process of analysis often helps build a shared sense of understanding, purpose and action.

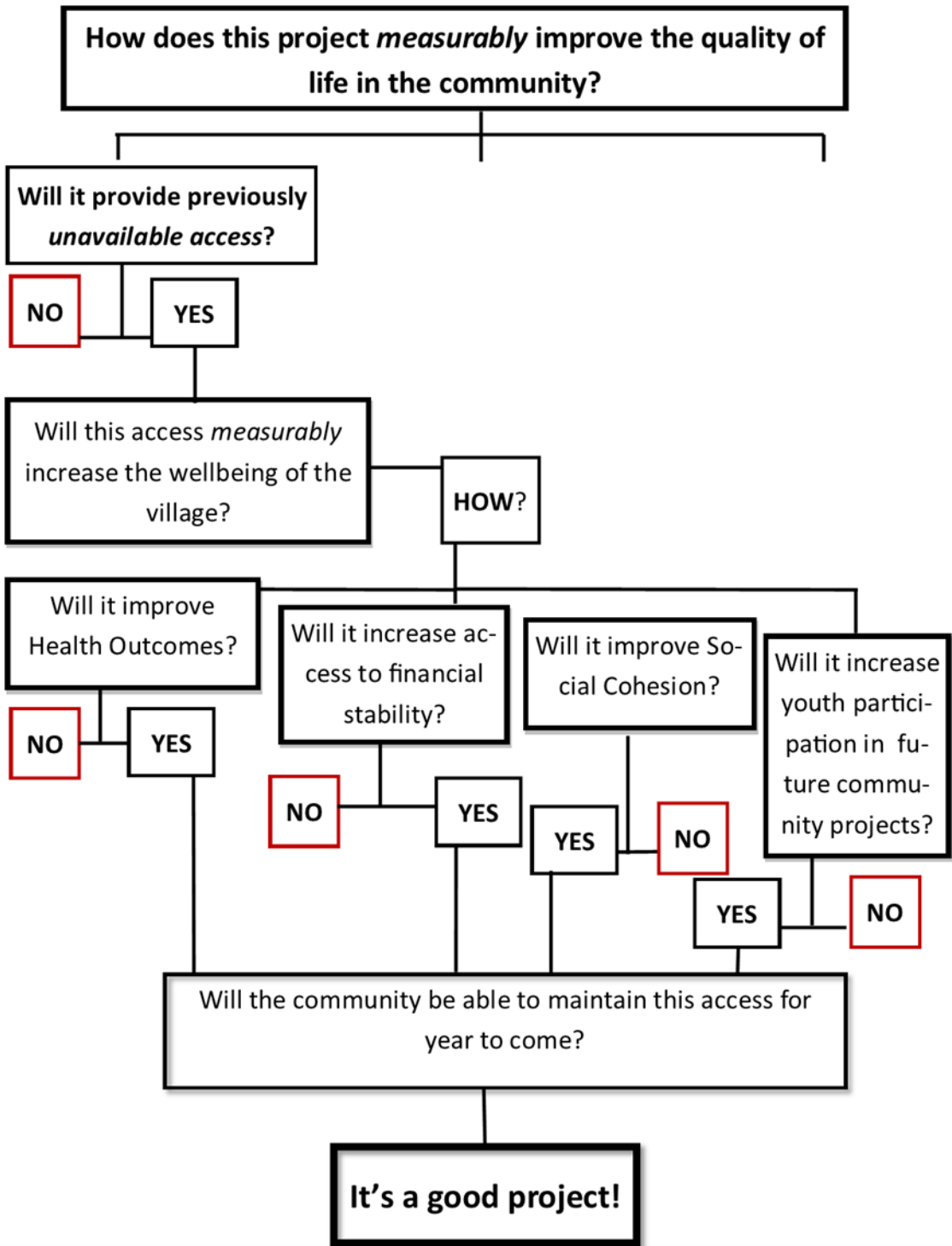
### Figure 4: Problem tree analysis

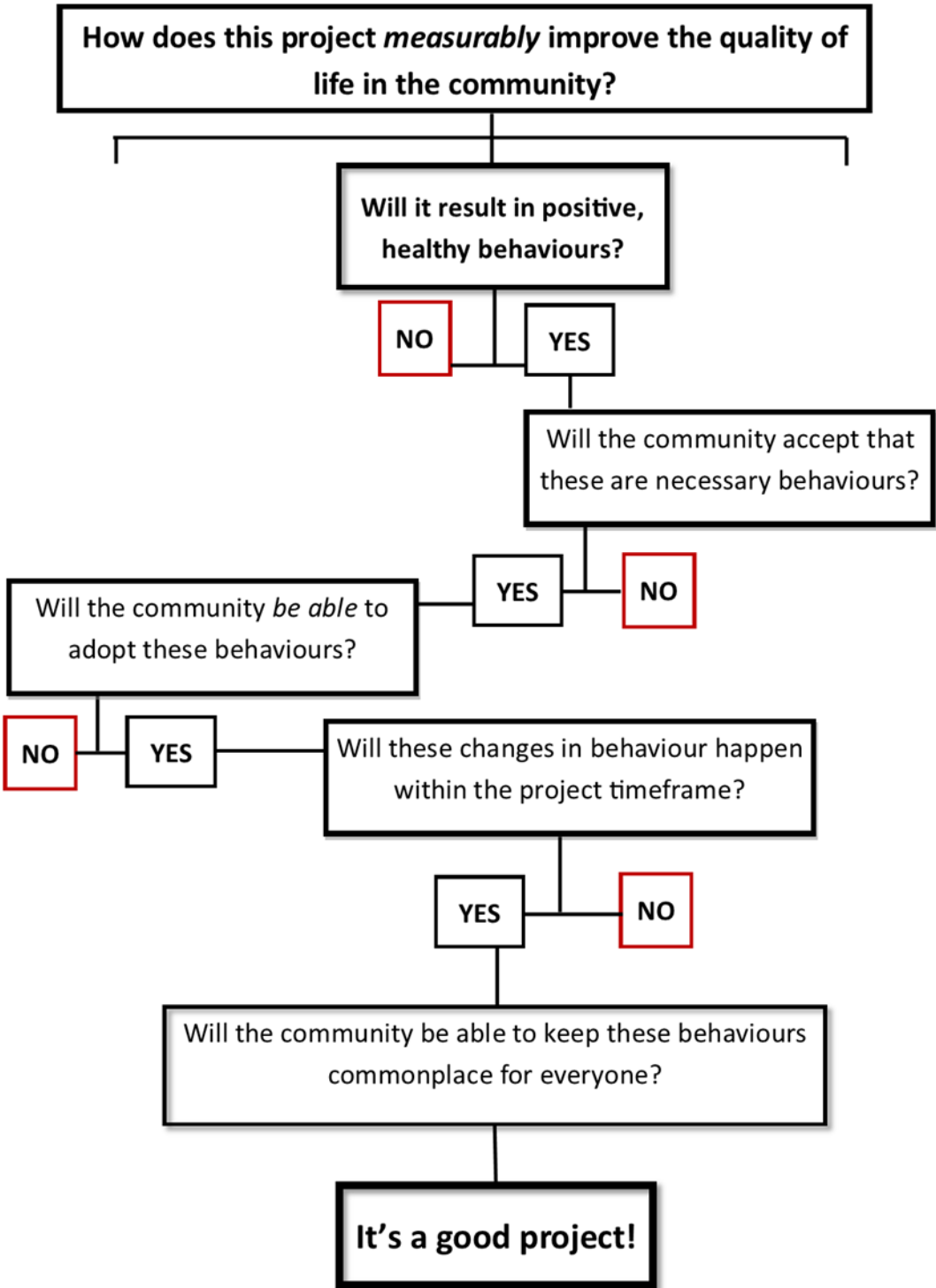
Problem tree analysis is best carried out in a small focus group of about six to eight people using flip chart paper or an overhead transparency. It is important that factors can be added as the conversation progresses. The first step is to discuss and agree the problem or issue to be analysed. Do not worry if it seems like a broad topic because the problem tree will help break it down. The problem or issue is written in the centre of the flip chart and becomes the 'trunk' of the tree. This becomes the 'focal problem'. The wording does not need to be exact as the roots and branches will further define it, but it should describe an actual issue that everyone feels passionately about.

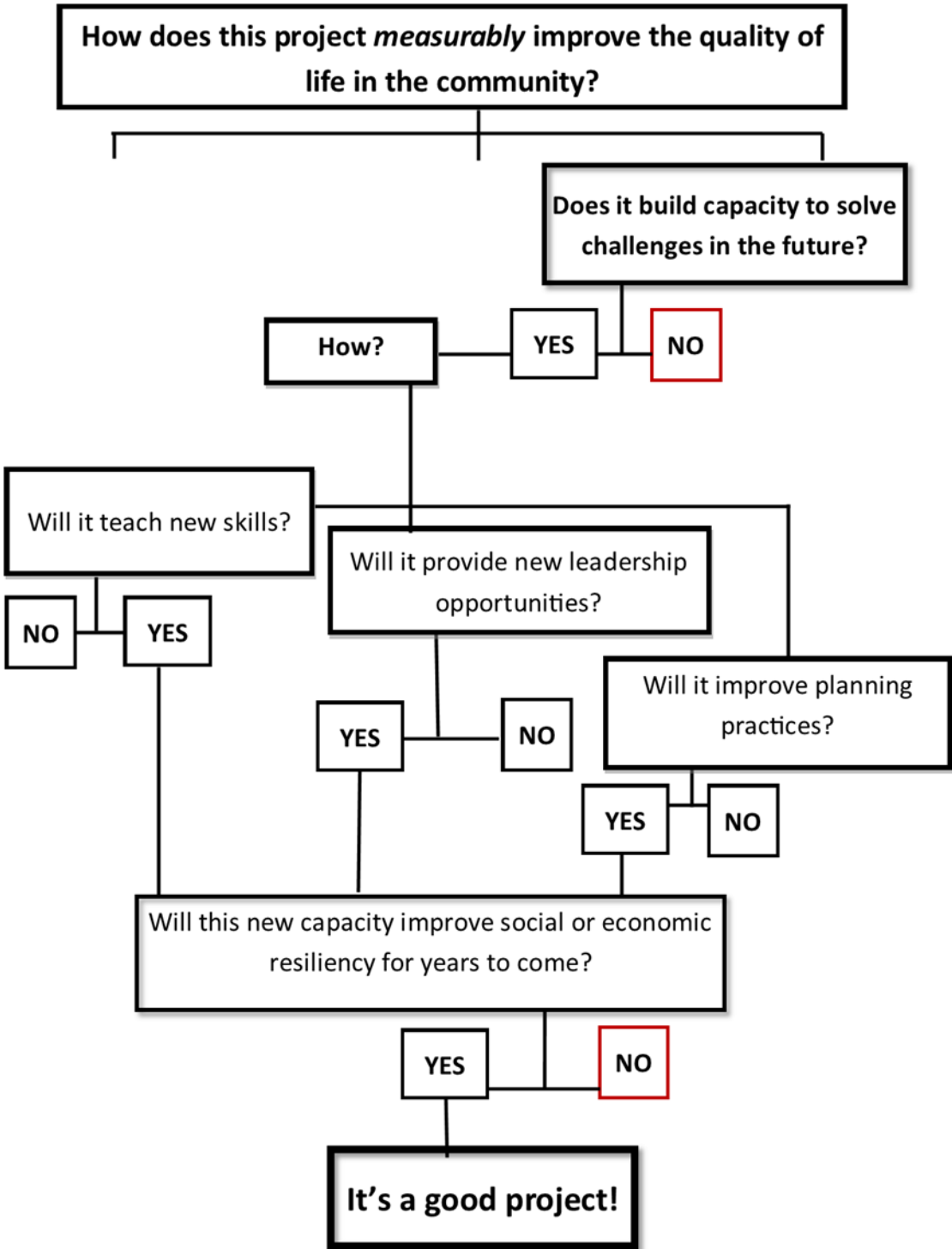
Next, the group identify the causes of the focal problem – these become the roots – and then identify the consequences, which become the branches. These causes and consequences can be created on post-it notes or cards so that they can be arranged in a cause-and-effect logic.

Step 8: Brainstorm – Decision Flowcharts














Step 12: Set Objectives – Objective Tree

Objective Tree 

<b>Goal</b>			
<b>Outcome</b>			
<b>Output</b>			
<b>Activity</b>			
<b>Why?</b>			

### Step 12: Set Objectives – Examples of Categories

Education	Knowledge Change	Access	Behavior	Sustainability
CAG educate households on dangers of open defecation	Increased awareness on dangers of open defecation	Latrines are built	People use latrines	
CAG educate households on importance of repairs and maintenance	Increased awareness on importance of repairs and maintenance			Latrines are maintained
CAG educate parents on importance of poppy stool use	Increased awareness on importance of poppy stool use		Children use poppy stools to defecate	
CAG educate households on importance of handwashing	Increased awareness on importance of handwashing	Handwashing stations are installed	People wash hands with soap and water	Handwashing stations are filled with soap and water

Step 13: Budget – Budget Tools

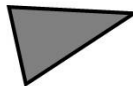
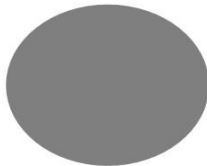
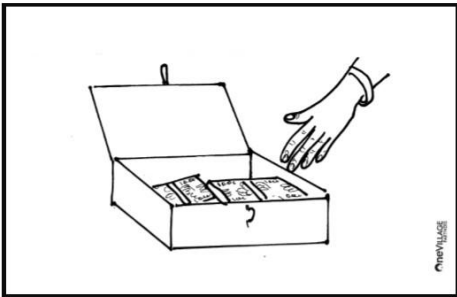


Village: \_\_\_\_\_

Project Name \_\_\_\_\_

Buffer:

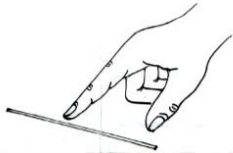
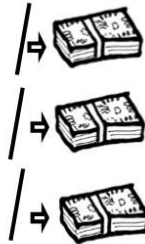
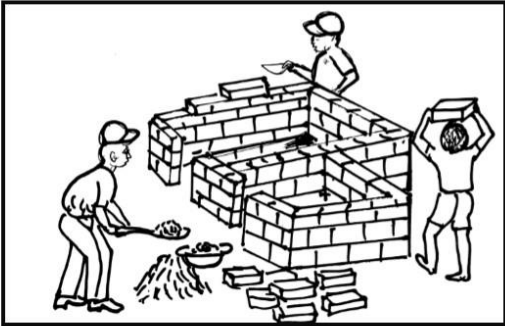
Unexpected  
Events



Total Community Budget		Total
45,000,000	10%	
Reserve		

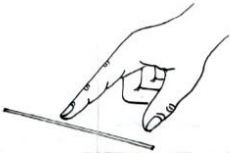
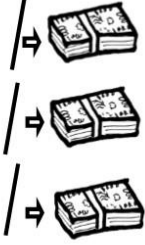
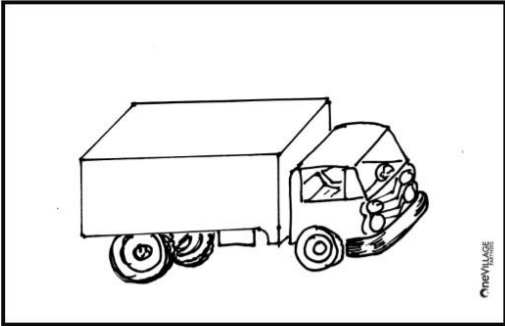


Budget:  
Building  
Materials



Item	Quantity	Cost	Total
Total Cost			

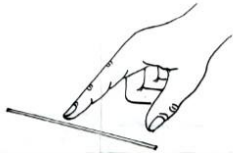
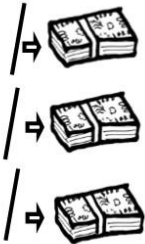
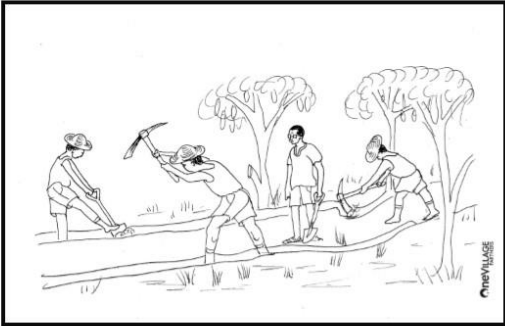
Budget :  
Transportation



Item	Quantity	Cost	Total
Total Cost			

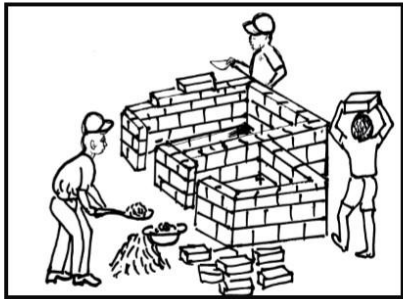
Budget :

Skilled Labour



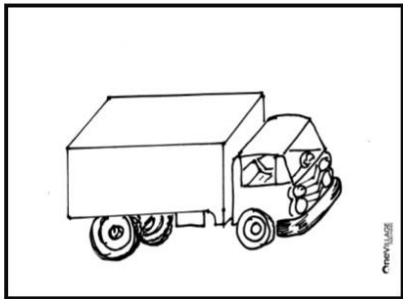
Item	Quantity	Cost	Total
Total Cost			

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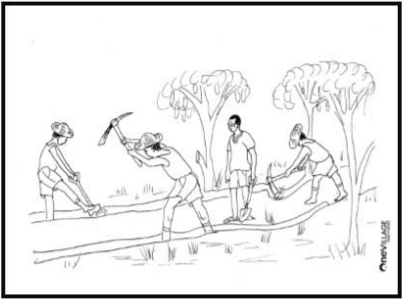
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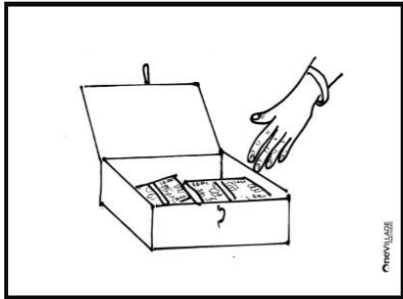
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\_\_\_\_\_ Total Project < { \_\_\_\_\_ } \_\_\_\_\_

Step 14: Plan - Planning Tools

	January	February	March	April	May	June
<p><u>Group</u> <u>Responsible</u></p> 						
						
						
						

	July	August	September	October	November	December
<p><u>Group</u> <u>Responsible</u></p> 						
						
						

### Step 16: Plan Monitoring – Indicator Sheet

Category	Objective	Indicator	Target
Knowledge Change	Increased awareness on dangers of open defecation	% of HHs that can name two dangers of open defecation	(Many) 75%
Knowledge Change	Increased awareness on importance of repairs and maintenance	% of HHs that can name two ways to ensure maintenance of latrines	(Many) 75%
Knowledge Change	Increased awareness on importance of poppy stool use	% of HHs (with a young child) that can state two reasons why their child should use a poppy stool	(Many) 75%
Knowledge Change	Increased awareness on importance of handwashing	% of HHs that can state two reasons why it is important to wash your hands	(All) 90%
Behavior Change	Community uses latrines to safely defecate	% of households report use of latrine	(All) 90%
		# of open defecation sites observed	0
Behavior Change	Children use poppy stools to defecate	% of HHs (with a young child) with an observed poppy stool in use	(Some) 65%
Behavior Change	People wash hands with soap and water	% of installed tippy taps that are in use at time of observation (has soap and water, water on ground)	(Some) 65%
Sustainability	Latrines are maintained	% of latrines that have a clean exterior	(All) 95%
		% of latrines that have experienced a breakdown and have been repaired	