

**A USER-FRIENDLY
PROJECTS HANDBOOK
FOR TRADE UNIONISTS**



**ANNEX 3
PROJECT PLANNING ACTIVITIES**

PROJECT PLANNING ACTIVITIES

1. INTRODUCTION

Planning is important and needs time and resources. A well-planned project is more likely to be effective; participatory planning provides the unions with ownership of the project.

Points to note:

- ▣ The selection of planning activities depends on the size of the project, number of stakeholders involved and the time and resources available.
- ▣ Establishing a project committee within the union/s to coordinate activities and information helps to ensure that it is a positive experience. The committee needs terms of reference and a mandate from the union executive/s.
- ▣ All planning activities should utilise participatory methods, involving the unions at all stages.
- ▣ A funding application for planning can be submitted to a sponsor or donor organisation.
- ▣ There can be no standard agenda as each workshop is conducted in a different situation and context. A generic agenda needs to be adapted.

2. RESEARCH

Gathering information as part of the planning process assists to focus objectives and identify the support and resources required to implement the project.

Participatory research can involve, activate and mobilise different levels of the union and ensure their commitment to the project. Research can be qualitative or quantitative and can include:

- ▣ The external environment
- ▣ The internal union situation
- ▣ The previous phase of the project, or
- ▣ The issue that the project will deal with, if known.

The first question to ask is **'What will the information be used for?'**. A distinction needs to be made between a broad 'base line study' or evaluation research and the type of research needed for planning a new project.

For example:

- ▣ Quantitative information about the union/s, the geographical spread or numbers of target groups is useful for identifying resource needs.
- ▣ If the theme of the project is known, for example trade union rights, a document research can provide sufficient information to include in the background section of an application.
- ▣ Qualitative information about people's perceptions of an issue can help prepare participants for a planning workshop.
- ▣ For a new project phase, information about the implementation of the previous phase is useful.

3. OTHER ACTIVITIES

Prior to a planning workshop a number of other activities can be implemented.

A Conference or Seminar

Holding an event prior to a planning workshop means that more people can be involved in the process.

- ▣ A conference or seminar can raise awareness and increase understanding of the issue, if the theme of the project is already agreed.

- ▣ Speakers can illustrate the existing situation and group work can produce recommendations and be adopted by the union. The outcomes can give a focus to the planning workshop.
- ▣ Media coverage can draw attention to the issue and set the scene for future work.

Meetings

The union can use structured meetings, workplace meetings or hold special meetings to discuss the project.

- ▣ Members or groups within the union have an opportunity to put their point of view.
- ▣ Small meetings can be used to discuss the issues and produce ideas.
- ▣ The needs or concerns of groups within the union, for example women or youth can be highlighted.
- ▣ The planning workshop participants can use this information as the basis for planning.

4. PLANNING WORKSHOPS

Participants

It is important that the people who attend the workshop have a mandate to represent their union and the experience to participate in the discussions.

- ▣ The best number of participants is 10 – 25, gender equality needs to be respected.

It is difficult to use participatory methods and reach genuine consensus with a larger number of people. On the other hand, there needs to be sufficient people to ensure a diverse range of experiences and ideas

- ▣ Participants need to have union experience and knowledge of the issues in order to contribute to the planning.

There should be a combined knowledge of union structure and policies, gender equality, the issues facing union and the economic and political situation that the union operates within

- ▣ Union leaders need to be included to ensure that the project can be integrated into the work of the union and is not seen as a fringe activity.

A commitment to implementation depends on the relevance of the topic and issue to the union

- ▣ People who will be responsible for implementing the project should also be involved, for example education officers.

If pre-workshop activities were held, some of those participants should also be included in the workshop

Time and Place

- ▣ The workshop should be planned with sufficient time for the unions to be able to check the draft of the application before it is submitted to the sponsor. The TUSOs have set deadlines for applications so it is important to plan the workshop well in advance of the deadline.

- ▣ For a new project the length of the workshop needs to be at least 4 - 5 days.

Participation and consensus decision-making takes time; if people are rushed they are less likely to commit to the project

- ▣ Two workshops of 3 days can be planned one or two months apart and 'between workshop tasks' given to participants; for example research or getting approval from the union executive.
- ▣ Residential workshops away from workplaces and the union office ensure that people are not distracted.
- ▣ The venue needs to be large enough for small group work, with areas to display all the results of group work in the room.

Preparation

One or two persons, with the skills to use participatory methods, should be selected to facilitate the workshop. They need to understand project development but should not influence the outcome of the workshop.

It is not appropriate in this type of workshop to invite speakers as this prevents participation

- ▣ Guidelines for facilitation should be shared with the selected facilitators.
- ▣ The workshop coordinators or committee need to prepare workshop objectives, an agenda and description with the facilitators. These are sent to participants prior to the workshop.
- ▣ Handouts can assist participants to understand the process.
- ▣ Equipment should include flip chart paper, marker pens, coloured cards and paper and something to hold flip chart paper on the walls.

Methods and content

Every workshop is different and each agenda needs to recognise the specific situation and context.

For example:

- ▣ A workshop for a new project focuses on developing the context, background and problem solving.
- ▣ A workshop for planning the next phase of the project spends more time on analysing the impact and outcomes of the previous phase.
- ▣ A workshop to plan a project for a single union is different from a sub-regional or national planning workshop because there will be differences between the country needs and situation.

Points to note

- ▣ Each workshop needs a specific aim and objectives; this ensures that the focus and emphasis of the workshop are relevant.
- ▣ The agenda for the workshop should use terminology that is consistent and accepted by the GU and the TUSO. This avoids misunderstanding during visits or in reports. The terminology needs to be explained at the beginning of the workshop.
- ▣ It is important to ensure that sessions are allocated to the roles of the stakeholders (unions, GUs, affiliates in sponsoring countries and the SSOs) and time allowed for participants to discuss and agree on these roles.
- ▣ Sessions should also include the cycles of the project, where the funding comes from and what is expected of the unions. Participants need to be able to question, make comment and have ideas.
- ▣ All sessions are interactive using participatory methods and include a combination of tasks, exercises, group and plenary discussion.

- ▣ Time is provided for questions, clarifications and the sharing of ideas and information.
- ▣ The facilitator gives clear instructions and coordinates any factual information that is needed.
- ▣ Time keeping is flexible because it is difficult to anticipate the time needed for group work and each stage of the agenda must be finished before moving on to the next.
- ▣ The final outcomes of the workshop are based on the input of participants, agreement is reached through discussion and consensus.
- ▣ The agenda should try to follow the sequence of the project application form.

5. THE ROLE OF THE FACILITATOR IN A PLANNING WORKSHOP

The facilitator plays a major role in ensuring that participants have ownership of the process and outcomes.

The participants need a safe environment to analyse situations, share ideas and reach decisions about the project that are acceptable to the union.

Consensus decision-making processes can produce tensions and disagreements; especially with a group of people who are experienced and often have strongly held points of view.

In this type of workshop there are no right or wrong responses. Negative criticism or any indication that participants are 'wrong' prevents participation. Judgemental feedback takes away ownership and undermines confidence.

The Facilitator has:

- ▣ A neutral attitude to the outcome and is not seen to have a specific agenda.
- ▣ Good communication skills and previous experience in facilitating participatory activities.
- ▣ Can anticipate situations and has a flexible and inclusive approach to participants.
- ▣ Experience in preparing agenda's, session outlines, tasks and exercises.

A Facilitator needs to:

- ▣ Establish and demonstrate an environment of trust and treat all input from participants with respect, so that they can safely express ideas and opinions.
- ▣ Include the participants in all decision making about the workshop.
- ▣ Allow time at the beginning of the workshop for participants to establish their own ground rules for behaviour
- ▣ Prevent negative criticisms, imposing of opinions or domination.
- ▣ Monitor small group work and if tensions are not being resolved assist people to resolve them.
- ▣ Use methods that help individuals to pool their ideas as a collective.
- ▣ Be flexible with timing and be able to make a judgement about when to move the workshop on to the next stage.
- ▣ Summarise the situation regularly and ensure that each stage reaches an agreed conclusion.
- ▣ Provide clear instructions and the necessary information for participants to complete each part of the agenda. Regularly check understanding.
- ▣ Provide feedback through the use of questions that encourage people to explore ideas without imposing own ideas.
- ▣ Encourage the participants to take over some facilitation when they feel comfortable with the methods.