Project Preparations

Planning, Design, and Operations Manual
Reform Planning

- **Where to Start From?**
  - Objectives, components, resources (finance, HR, experts)
  - Timeline
  - Legal aspects

- **Decision making and supervision mechanisms**
  - Groups for coordination and supervision

- **Institutional framework**
  - Key implementers (staff & consultants)

- **Identification of needs in processes and tools**
  - MIS development from design to implementation
Three key questions: What? Who? How?

• What do we want to do?
  – Is the program on the design stage or on the implementing stage?
  – What working processes should be improved or changed?
  – What can be built on the existing resources (people, experience, infrastructure)?

• Who will make the decisions? Develop? Implement?
  – Involvement of the local expertise and international know how
  – Training, development, accompaniment

• How to ensure the effective and sustainable implementation?
  – Processes
  – Tools
  – Supervision
  – Timeframe
  – Operations manual
Implementation Processes

• The program is combined by the set of the algorithms, which, being step-by-step implemented, would lead to the program tasks implementation

• Each algorithm is to be described, piloted and agreed with the implementing teams

• The detailed description of the algorithms is combined into the holistic guidelines for the process implementation

• The more layers are in the program implementation, the more efforts should be spent for the process description
MIS as the Tool for Implementation

- MIS is not the goal, but the tool for the program implementation
- At the beginning of the program implementation, MIS is often seen as a tool for data collection
- MIS starts with the limited number of functions, and then integrates all program processes
- MIS is not just technology for professionals,
- MIS Design and development requires involvement of all interested departments/specialists at the planning stage already
Institutions/system analysis & MIS development

Analysis of business needs and new operational requirements

Design of MIS specifications

MIS development

Piloting, training, adjustments

Implementation
Implementation Challenges

- The Changes (even logical and obviously needed may be not supported by the existing legal documents)
- Distant Implementation management
- Variety of details
- Different level of staff competence
- Different level of the program understanding (methodology and tools)
- Different needs in training and consulting
Operations Manual as a Key to the Program Effectiveness

- The program goal answers the WHAT? question
- The operations manual answers the HOW? question
- The answer for the WHAT question is enough only when the program is implemented by a limited number of people accompanied by those who knows HOW
- The operations manual will allow fast training of the new staff in new areas, ensure standards in implementation, and quality services
- The operations Manual can be of two main types:
  - one big manual combining all relevant information for the implementing teams/agencies;
  - or the set of the operational documents for different levels/groups of users
Why operations Manual?

- Common Goal
- Many versions
- Different People
What is the Content?

- General program description
- Organizational structure /institutional arrangements
- Business Process
  - Public awareness
  - Application process; data entry
  - Assignment of benefits, payment process
  - Verification
    - Accuracy of information
    - Quality of targeting
  - Check of the documentation (due diligence)
  - Appeal and complaint processes
  - Data entry and processing
  - Monitoring and reporting system
Lessons Learnt

• Step by step planning process based on the general needs assessment
• Reforming is built upon the existing rules and regulations or initiates their change
• The MIS change should be in line with the reform planning
• All relevant staff/departments are involved at all levels of the program implementation:
  – Any changes should be piloted before they are approved in the operations Manual
  – Manage up vs. manage down approach
  – The program developers accompany the field piloting
  – The program implementers feel ownership over the process results