Project Preparations

Planning, Design,
and Operations Manual

Reform Planning

❖ **Where to Start From?**

 ❖ Objectives, components, resources (finance, HR, experts) time line

 ❖ 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 implementaion*

- *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 implementaion 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
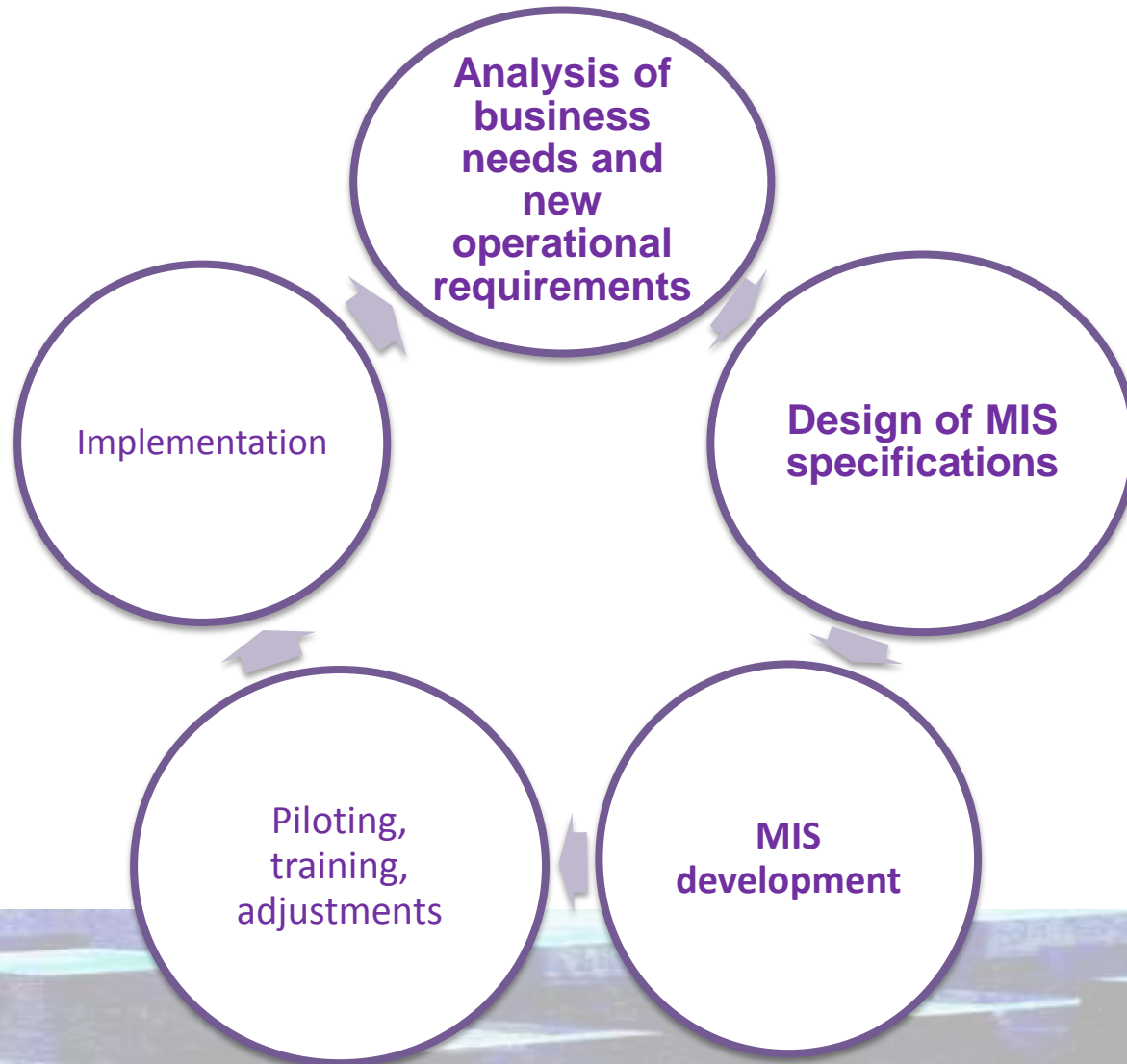
Implementation Challenges

- *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 implementaion, 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?
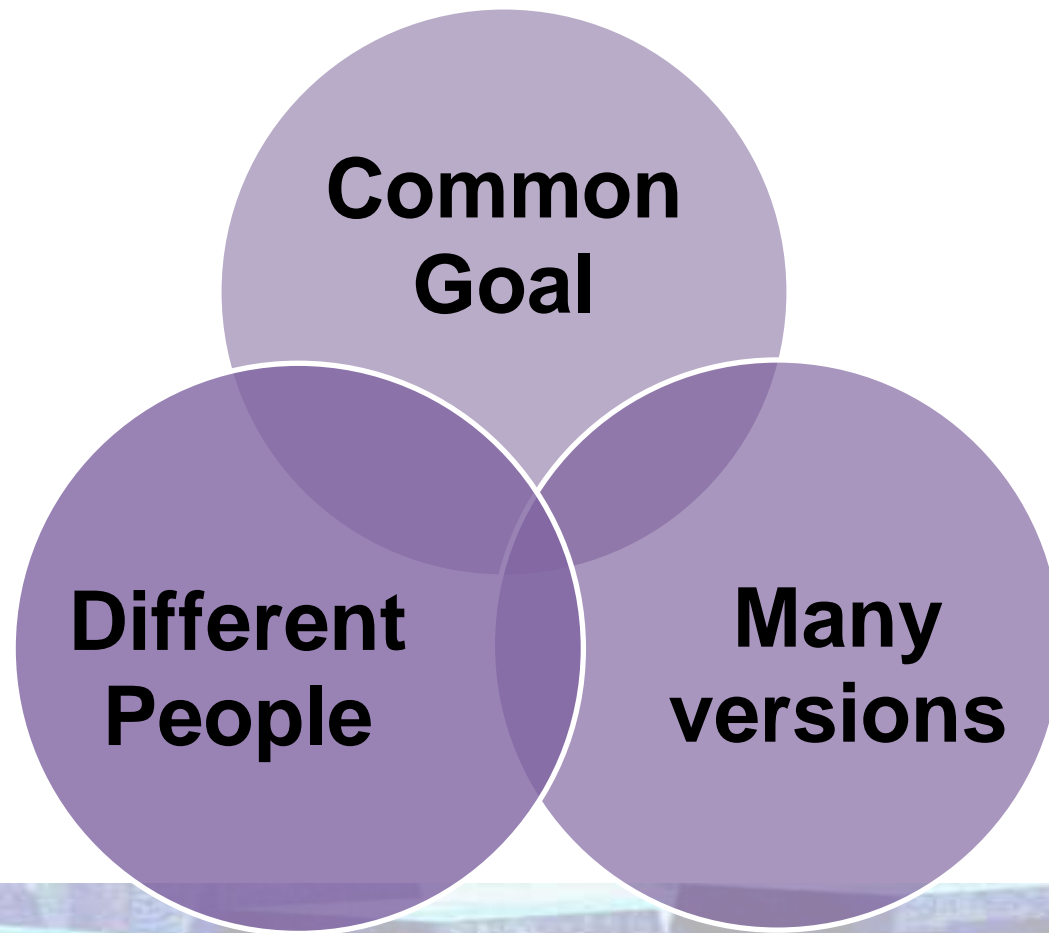
What is the Content?

- *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 implementaion :*

  – *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*