The PSO Workshop Cycle

"Action Planning on the Programmatic Approach"

An overview

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Preface

Dear Reader,

This document contains an overview of the development and implementation of the PSO Workshop Cycle on programmatic approaches which ran thrice during 2004 and 2005. Objective is to share a number of issues that came up during the course of the cycle, which relate to how participants were able to work with the concept of programmatic approaches.

The overview was written up by the course facilitator, Daan de Roo van Alderwerelt, and refers specifically to the cycle's process as well as to the way the content developed in interaction with the participants. It forms part of some PSO research which is currently under way to assess how and especially why participants were able to use newly acquired insights and skills to the benefit of their respective organisations.

The Workshop Cycle has drawn in approximately one third of the PSO membership (and a selection of their partners) wanting to learn more on programmatic approaches. We aimed to provide an opportunity for exchange between a variety of donors and their partners, as well as focus on programme management knowledge and skills. According to participants the cycle was mostly appreciated for the donor – partner dialogue which ensued as a consequence of 'sitting together'. Also it proved useful in terms of 're-visiting' programme management theory in practice. The exchange was caught in the middle, as it already proved difficult enough to understand the own working relationship, let alone the context of other organisations and countries. We realize we added to this dynamic when we decided to include more programme management tools to level the playing field among the great variety of experiences. In a way this technified the discussions instead of humanizing them.

Interestingly participants reminded us of this, when asking for soft approaches, such as conflict management, negotiating skills and the like. Moreover although the emphasis of the cycle was on the 'adaptations required within the organisations' to move toward working more programmatically, we did not explicitly prepare the individuals to influence management levels. One of the objectives of the ongoing research is to get a clearer view as to how the participants have fared in setting the agenda within their respective organisations to adapt and change their way of working. Hopefully this will also give a clearer insight into how PSO can further assist such processes.

Daan de Roo draws the attention to concepts, ideas, actions and routes taken by participants to start with such a change process. It will be used to design the learning trajectory on programmatic approaches further. We gladly solicit any feedback.

Roel Snelder
PSO Knowledge and Learning Centre

Introduction

The PSO Knowledge Centre has together with Daan de Roo van Alderwerelt, associate of the PCM Group, developed and implemented a workshop cycle "Action Learning on the Programmatic Approach". It was in particular developed for participation by member organisations with one of their local partners [1].

The objective of the workshop cycle, "Improved capacity of member organisations and their respective partners to apply the programmatic approach to capacity building" was to be achieved through a participative and (inter)active process.

The workshop cycle centred on two main questions:
1) "Which adaptations are required to actor's contexts to allow effective application of the programmatic approach";
2) "How to conceptualise/design a concrete programme proposal applying the programmatic approach?"

The first question was the main focus of both, a first workshop and the subsequent interim period of approximately three months between this workshop and the second workshop. The latter had the second question as main focus.

The first workshop cycle started with a first workshop in July followed by a second workshop in November 2004. The second cycle started in September 2004 followed by a second workshop in January 2005. The third cycle started in February 2005 and was followed by a second workshop in June 2005.

Since the PSO Knowledge Centre would like to further develop its work on the programmatic approach, it was decided to reflect on the work undertaken so far. The objective of this reflection is: "Lessons learned identified in terms of the content and process of the PSO workshop cycle on programmatic approaches".

During the exercise, main attention is given to the following points:
* the approach using the workshop cycle;
* the programme/project cycle and related concepts;
* the participation by PSO member and partner organisations;
* the approach chosen by participants while applying new insights both during the workshops and in between workshops;
* main conclusions/trends that were highlighted concerning the programmatic approach;
* learning needs that surfaced during the process.

In the first chapter, the report discusses the approach of the workshop cycle and the adjustments decided upon after running the first workshop. In the second chapter, the report looks at what happened during the first workshops of the learning trajectory. In the third chapter, the action plans implemented by the participants during stage two of the process are discussed. In the fourth chapter, the report looks at the work undertaken during the second workshop, namely designing/conceptualising a programme/project applying analytical and planning tools in the framework of the programmatic approach. In chapter five, the report looks at key points and trends highlighted and discussed by participants concerning the application of the programmatic approach. In chapter six, the report attempts to draw conclusions and indicates learning needs that surfaced during the three workshop cycles.

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[1]   A listing of participating organisations with there respective partners is attached as annex 1 on page 22.

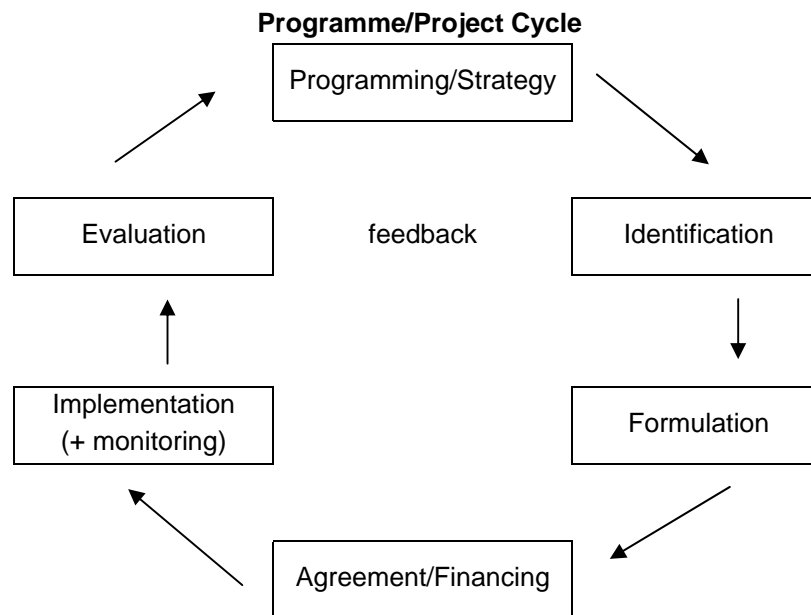| The PSO Programmatic Approach	

<u>Four key terms</u>:
• leadership by (a) local organisations (s);
• one cohesive programme/project and budget framework;
• donor coordination + harmonisation of procedures;
• local participation with respect to:
  ➢ analysis
  ➢ programme design
  ➢ implementation
  ➢ management
  ➢ monitoring & evaluation.
	<u>Emphasis</u> on aspects such as:
	• synergy
	• collective planning
	• local "ownership"
	• linking and learning.

1. Approach of the workshop cycle

1.1 The initial approach

The first and the second workshop were initially designed to last three days each. The first workshop was designed to focus on the characteristics of the programmatic approach and in particular on the question "Which adaptations are required to actor's contexts to allow effective application of the programmatic approach". This workshop was to identify "obstacles" between the participating member organisation and her partner to effectively apply the programmatic approach. Subsequent to identifying "obstacles", ways to address them were to be identified. This part of the process was to be undertaken in small subgroups in a mixed composition. The intention of this mixed subgroup composition was to maximise the experience exchange and therewith the learning opportunities.

Finally, an action plan was to be developed to address the most pressing "obstacles" during the approximately three months in between the two workshops. These action plans were to be developed by subgroups consisting of representatives of the member organisation and their partner. The whole exercise was to be undertaken for each of the six phases of the programme/project cycle (programming/strategy development, identification, formulation, agreement, implementation and evaluation).

During the first workshop, participants were also asked to spend some time during the evenings to reflect on the consequences of the "lessons learned" during the day for their own specific relationship. In order for their colleagues to also learn from these insights, participants were asked to briefly share their findings (orally) at the start of the next day. The results of the implementation of the action plans were scheduled to be exchanged and discussed on day one of workshop two. The remaining days of that workshop would further focus on the question "How to conceptualise/design a concrete programme proposal applying the programmatic approach?".

In order to enable the participants to benefit from the experience of their colleagues during the interim period, the participants were encouraged by the organising team to use the internet for possible consultation and exchange. For this purpose, email addresses were made available and a forum was opened on the PSO website. Apart from further encouragement as part of the response to the mid-term questionnaires, exchange between participants was not actively facilitated by the organising team during the interim period. Mid-way the interim period, a questionnaire was distributed by the organising team among participants as a kind of mid-term review. Based on the results, the organising team responded to participants by summarising the points raised and sharing their findings.

Programme/Project Cycle

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                    Programming/Strategy

      Evaluation          feedback          Identification


   Implementation                            Formulation
   (+ monitoring)

                    Agreement/Financing
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1.2   First experience with the initial approach

a) Soon during workshop one, it became obvious that the knowledge and skills levels, in particular with regard to development management (e.g. programme/project cycle management (PCM) and related concepts) were rather limited and rather uneven between participants. Some participants had some knowledge with regard to programme/ project cycle management and related concepts, others had some working experience while yet others had never seen these concepts before. Most were not familiar or had very limited experience with analytical tools such as problem and objectives analysis.

b) A second learning point was the fact that it turned out not to be as effective as anticipated (also expressed by the participants) to have participants identify "obstacles", and ways to redress them, in a mixed subgroup formation. The identification of "obstacles" in mixed groups for all the phases resulted in a loss of momentum. Participants seemed more interested to do this exercise with their own partner regarding their own concrete situation. Given this experience, the organising team decided to let the participants of group one identify "obstacles" and corresponding "suggestions" to overcome them, with their own partners. This turned out to be more productive and was by all parties considered a substantial improvement.

c) Another important learning point was the realisation that most participants discovered during the process that they needed to dedicate much more attention to the three preparatory phases of the cycle than initially anticipated. It was therefore decided to allow participants, during the identification of their own "obstacles" and "suggestions", to work on one or two phases of the programme/project cycle of their own choosing. This also turned out to be a substantial improvement.

d) The early morning verbal "lessons learned" sessions were considered fruitful. The organising team however experienced it as a disadvantage that the fruits of these sessions could be lost for the participants, merely because of their verbal form. They decided therefore to look for a form for the remaining workshops were this risk would be minimised.

e) As to the exchange of experiences and consultations during the interim, this turned out to materialise only on a very limited scale. Feedback from participants suggested that work pressures, already a constraint for the implementation of the action plans themselves, played an important constraining role here. Apart from the encouragement during the first workshop, and as part of the response to the mid-term questionnaires, exchange was not actively facilitated by the organising team during the interim period.

f) The review session at the end of the second workshop of group one was considered fruitful. However, the presentation of the points raised only took place verbally. It would probably have been more fruitful had the points been presented in writing as was now the case during the "learning points" sessions of each morning.

1.3   Consequences for the subsequent workshop cycles

Based on learning point a), in order to achieve a level playing field in advance of the exercise on the programmatic approach, it was decided to add one day to the subsequent first workshops of the next cycles. It was at the same time decided to also extend the second workshops with one extra day. This, to be able to spend sufficient time on PCM concepts and to allow participants to apply them straight away when designing a concrete programme/project proposal.

Based on learning point b), it was decided to let participants work in mixed subgroup formations only during the discussion on "principles" and "differences" between the traditional project and the programmatic approach. Identification of "obstacles" and "suggestions" to address the situation would take place in subgroups composed of members with their actual partners, thus providing participants with the opportunity to straight away work on their own specific situations.

Based on learning point c), it was decided to remain flexible during the next workshop cycles as to the phase of the programme/project cycle participants would like to work on when identifying "obstacles" and "suggestions" to address them. This further allowed participants to work on their own specific situations, in particular since this exercise would now be done solely in the actual member-partner formation.

Regarding learning point d), in order to accommodate and further strengthen the learning process of participants, it was decided to indeed alter the "learning points" sessions.

As of the first workshop of group two, each group, consisting of member and partner, was asked to write down their learning points on cards and put them on a flip-over sheet. These flips were then hung up in a separate room (the "Learning Points" room). Each following morning, additional points were added. During these sessions, one or more groups presented their points, followed by a brief discussion. These sessions provided the opportunity to further deepen the understanding of key concepts in the framework of the programmatic approach. The "lessons learned" were all registered and distributed to participants by email within one to two weeks after the workshop.

Regarding point e) the organising team, as before, continued to stress the learning opportunity of this exchange in between workshops one and two, but did not actively facilitate this process during that period. It was however felt by the organising team that this exchange should not be imposed on the participants and that at this stage of the trajectory further initiative should be left to participants' own discretion. Here the approach was thus not changed.

Regarding point f) the review session, it was decided to ask the participants, as of group two, to put the concluding remarks in writing on white cards. These would than be collected, exhibited on the wall in front of the group, and subsequently be discussed in plenary.

1.4   Conclusion

According to the response from participants as well as our own observations, apart from point e), these adjustments seem to have contributed considerably to a more focused and productive exchange during the workshops. The impression given by the first group with regard to the knowledge and skills levels, in particular concerning development management (e.g. programme/project cycle management and related concepts) was generally confirmed by our experience with subsequent groups.

It was interesting and reassuring to experience that the majority of participants themselves seemed to have gradually become aware of this constraint during their learning process. Most of them appeared eager to learn new or improved approaches in this respect.

As to the exchange of experiences between participants during the interim period, this still only took place on a very limited scale. Strengthening this part of the process would most likely require more active facilitation. Time limitations and other work priorities of participants are however most likely to remain serious obstacles to an effective exchange.

For PSO capacity building is:
" The process in which individuals groups, organisations, institutions and societies increase their abilities to:
1) perform core functions, solve problems, define and achieve objectives;
2) understand and deal with their development needs in a broad context in a sustainable manner." [2]

PSO defines capacity building at three levels:
1) Human Resources Development (HRD) [3];
2) Organisational Development (OD) [4];
3) Institutional Development (ID) [5].

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2. What happened during the first workshops

2.1 PCM Day

2.1.1 Description of the process

During the first day, participants of groups two and three [6] looked at various aspects of PCM, and related concepts, as important building blocks within the programmatic approach. For many participants this was rather new, for others this day served as a refresher.

After a brief introduction to the programme/project cycle, participants acquired knowledge and insight, from each other and from the trainer, as to often overlooked reasons for failure of planning exercises in development ventures. The participants looked at the impediments of donor-, solution-, supply- and hardware-driven approaches as opposed to needs-driven approaches. The potential impeding role on analysis and planning of different perceptions was illustrated by critically looking at the effects of biases and tunnel visions on analysis and planning.

Particular attention was given to the importance of the separation of the phases in the cycle and the therewith associated meaning of relevance, ownership, feasibility and sustainability. The participants were then introduced to Goal Oriented Programme/Project Planning as an alternative to "activity" oriented planning and as a means to structure their thinking during analysis and planning.

Participants were also acquainted with important aspects of Logical Framework Analysis (LFA), with particular emphasis on the analysis phase. Considerable time was spend on problem (the anchor for development interventions) and objectives analysis.

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[2] UNDP, 1998. "Capacity Assessment and Development", Technical Paper III.
[3] PSO defines HRD as "the improvement and maintenance of the quality of personnel resources within the organisation".
[4] PSO sees OD as "sustainably improving and strengthening the internal capacity of an organisation (or sections thereof), so that it is better able to achieve its objectives and fulfil its mission".
[5] PSO defines ID as "the general development and influencing of the broader context in which organisations operate".
[6] As mentioned under 1.3 above an extra PCM-day was only included in the first workshop of group two and three.

Mixed subgroup formations practised problem formulation and problem tree building. Following the establishment of the causal relationship (cause-effect) of the identified problems, participants practised objectives formulation and objective tree (means-ends) building. The role of the different levels of the objective tree and its connection with the logical framework matrix was explained. The Logical Framework logic was briefly introduced and explained.

> One participant summarized the role of the quality criterion **"relevance"** as:
>
> to assure that the development effort
>
> **"scratches where it itches"**

2.1.2   Evaluation

This day was by a large majority of participants considered very useful either as an opportunity to acquire new knowledge and skills or as a refresher thereof. During this day, it became obvious that hardly any of the participants had really ever worked extensively with these concepts in a consistent way. A considerable number of participants was not aware of the importance of the distinction between phases in the programme/project cycle, e.g. between the identification and formulation phases. They learned how important and essential this distinction is for the quality of decision-making and therewith ownership of development efforts.

Identification and in particular formulation of problems appeared to be very difficult for a considerable number of participants. Participants struggled in particular with the fact that abstract concepts, possible problems and "absent solutions" are not considered functional in problem identification. In problem identification the focus is on "real existing" and "concrete" problems.

Difficulties in problem identification flowed from the sometimes absent real concrete knowledge of problem situations at field level, pointing at the importance of the presence of actual stakeholders during programme/project preparation and in particular the identification phase. The result was that problems were in many cases formulated in a far too abstract way, making it very difficult or even impossible to establish useful cause-effect relationship for tree building.

In order to achieve a situation were participants would be able to effectively apply the programmatic approach, more practical working experience with the application of these skills and further gradual development of their methodological knowledge would be highly desirable. This requires a working environment supportive of the practical application of these skills. The next three days were intended to in particular look at the organizational context within which the programmatic approach is to be applied.

2.2   Analysis of implications for members and partners

2.2.1   Description of the process

Building on the newly acquired or refreshed knowledge and skills during day one [7], participants spent day two identifying and briefly discussing aspects of the programmatic approach in general.

Subsequently, participants identified "differences" between the programmatic approach and the more traditional project approach, for each of the six programme/project cycle phases, while also identifying their "advantages" and "disadvantages". This exercise was in all first workshops undertaken in mixed subgroup formations. The results of this group work were presented and discussed during plenary sessions.

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[7]   A programme/project cycle management introduction and refresher workshop of one day was included in the programme as of group two.

Subsequent to this undertaking, actual member-partner subgroups were asked to identify "obstacles" to apply the programmatic approach within the context of their own specific relationship. In order to make this exercise as realistic as possible, given the workshop context, the subgroups worked on phases of the programme/project cycle which they considered most appropriate to them.

However, as earlier mentioned in chapter one, group one first generated and discussed obstacles in mixed-group formation. Since this was considered less effective [8], they were allowed to shift to working in actual member-partner group formations.

Most subgroups identified "obstacles" related to their organisational context, while a few went straight to field programme/project level "obstacles". It sometimes appeared difficult to stay away from the programme/project level and really focus, as was primarily required in the framework of the learning trajectory, on participants' own organisational context and constraints. In some cases, looking first at the programme/project level, helped participants developing an understanding of the required organisational adjustments and realising that these should be realised first.

<u>2.2.2   "Obstacles" to applying the programmatic approach</u>

At this stage of the process, the main trends in "obstacles" to applying the programmatic approach, identified by participants at different levels of Capacity Building, could be described as follows:

<div align="center">Human Resources Development (HRD)</div>

- Knowledge, experience and skills with regard to programme/project cycle management concepts and the programmatic approach, at both member and (potential) partner levels, not yet sufficient to effectively apply the programmatic approach;

<div align="center">Organisational Development (OD)</div>

- Mandate, policy and strategy of organisations and/or management support incompatible with the programmatic approach (e.g. at donor end: donor driven support as opposed to support driven by partner and beneficiaries' needs requirements. Another point mentioned was the not yet made strategic choice to cooperate with other, possibly competing, organisations);
- Organisational structure of member and /or partner organisation incompatible with the programmatic approach (e.g. distribution of responsibilities and tasks within the organisation) [9].
- Organisational culture of both member and partner organisations incompatible with the programmatic approach (e.g. the bottom-up participatory approach, the required long-term focus);
- Resistance to change at various levels within member and partner organisations (e.g. resistance to cooperating with competitors for funds, conflict of interest, organisations and people with other values).
- Procedures within member and partner organisations incompatible with the programmatic approach, in particular mentioned with reference to donors (e.g. lengthy approval cycles, monitoring, evaluation and reporting procedures and requirements), but also mentioned with regard to the relation between partner organisations;
- From the recipients perspective the challenge of donor coordination;

<div align="center">Institutional Development (ID)</div>

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[8]   See also learning point b), paragraph 1.2, page 5.
[9]   Although other issues are also of importance with regard to the frequently mentioned obstacle "*time constraints given the time consuming aspects of the preparatory stage in the framework of the programmatic approach*", the first two obstacles mentioned under the heading "Organisational Development" are particularly crucial from this perspective.

- Cooperation agreements between member and partner not yet geared towards the programmatic approach or non-existent;
- Procedures between member and partner organisations incompatible with the programmatic approach, in particular mentioned with reference to donors (e.g. lengthy approval cycles, monitoring, evaluation and reporting procedures and requirements), but also mentioned with regard to the relation between partner organisations;
- Risk of instability of partnerships, (e.g. financial situation, insecure employment situation for staff, high turnover of staff);
- Obstacles to find common interest among potential partners to apply the programmatic approach (e.g. resistance at various levels within member and partner organisations, conflict of interest, competition for funds)
- Insufficient experience with the management of partnerships (e.g. identification, assessment and selection of partners, required competences of partners, role of organisational culture and values, conflict management);
- Values between (potentially) cooperating organisations incompatible (e.g. role of religion or absence thereof);
- Local culture may not support the participatory approach as implied in the programmatic approach;
- Uncertainty concerning the reliability of government commitment where required;
- National legal frameworks may not support the establishment of more than a specific minimum number of NGOs in a geographical area;
- National legal frameworks may not allow NGOs to operate in specific intervention areas (e.g. partnerships only possible with government agencies);
- Capacity of the communication infrastructure may in some areas impede on effective communication among a multitude of partners;
- Limited or no availability of funds to finance the labour and time intensive preparatory stage implied by the programmatic approach (e.g. donors often reluctant to provide the required funding for the time-consuming preparatory stage, donors often focused on the short rather than the long term);
- Donor influence on choices (threat of limited local ownership due to donor-driven approaches).

2.2.3   Evaluation

As can be seen from the above, this process was a rather productive one. The actual member-partner group formations worked on real issues while identifying and discussing real "obstacles" to their work situation. "Obstacles" at different levels of capacity building were identified in attention areas such as the organisational context, the cooperation arrangements between organisations, the management and development of partnerships, institutional and funding aspects.

Presentation and discussion of the obstacles in plenary proved to be a useful experience sharing exercise. Interesting to see here was that quite a few participants initially assumed that they were already in or almost in the implementation or formulation phase of the programme/project cycle. In particular, the build-in interaction between member and partner organisations led to the awareness of the fact that considerable elements of the preparatory phases (indicative programming/strategy formulation, identification, formulation and agreement) had initially been overlooked.

It turned out that in a significant number of cases essential stakeholders had not been sufficiently involved during the preparatory stage. The result was that most groups decided following this exercise, and their joint reflection during the evening, to first (re)consider phases of the preparatory stage of the programme/project cycle.

Another interesting aspect at this stage was that some sub-groups initially had the tendency to identify "obstacles" at the level of the partner and or , as also briefly referred to earlier, at the level of the actual programmes/project, without immediately considering the organisational context of the member organisation.

Through the exchange of experiences and perceptions, most participants realised after a while that the member organisation's context also required adjustments (e.g. organisational strategy, management support, distribution of responsibilities and tasks etc.) to be able to effectively apply the programmatic approach. At this stage of the process, most participants started to realise how important it was to go through this workshop cycle together.

2.3   Response to identified obstacles

2.3.1   Description of the process

Based on the identified "obstacles" (Where are we now?), participants formulated desired "future situations" (Where do we want to go to?). They subsequently generated "suggestions" (How are we going to get there?) of ways how these objectives could be achieved. As a precaution, the groups also identified "risks" that could possibly impede on the realisation of these objectives. Findings were shared and discussed with the other subgroups in plenary sessions. Participants then prioritised en selected the "obstacles" to be addressed during the interim period between workshop one and two.

2.3.2   Evaluation

Although group two and three had the advantage over group one that they had the benefit of the extra day on programme/project cycle management, formulating "obstacles" was still not easy. Transforming them into objectives turned out to be a hard ordeal for quite a few participants. In particular, the good practice to stay as close as possible to the obstacle description was regularly overlooked. Sometimes stated objectives had hardly anything to do with the identified obstacle [10]. It also appeared difficult not to formulate objectives as activities. This showed limited practical experience of participants with the analytical tools of LFA.

The presentation and discussions in plenary enabled participants to comment and share experiences concerning the proposed responses to identified "obstacles". This exchange with colleagues also proved useful to identify possible "risks".

3.   The action plans implemented during stage two

3.1   The action plans - the process

Finally, on the basis of the ground work now completed, participants designed action plans to be implemented by each member-partner group during stage two. Approximately half-way this stage, participants were asked to provide feedback on the status of their undertaking by way of a mid-term questionnaire, specifically developed for this purpose. The organising team collected the responses, summarized them and fed their impressions back to the group.

During the first day of workshop two, participants presented their work undertaken during this stage and shared "lessons learned" from their experience with the programmatic approach so far.

3.2   The action plans - the content

Issues chosen by participants to work on during the interim period of stage two basically concerned two different levels of intervention, namely: I. Member-partner cooperation, and II. Partnership management by partner organisations. They can be summarised as follows:

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[10]   This practice often points at a solution-driven approach (e.g. absent solution) and/or an activity orientation. One already has a solution in mind before the actual analysis of the existing situation. It bears the risk of investing in a solution that doesn't address existing problems.

I. Member-partner cooperation

- Development of strategies compatible with programmatic approach by both member and partners organisations;
- Incorporation of the programmatic approach in existing strategic plans of member and local partner organisations;
- Restructuring of both the local partner and the member organisation (e.g. redistribution of responsibilities and tasks) in order to accommodate the effective application of the programmatic approach;

These concerned basically organisational development (OD) issues.
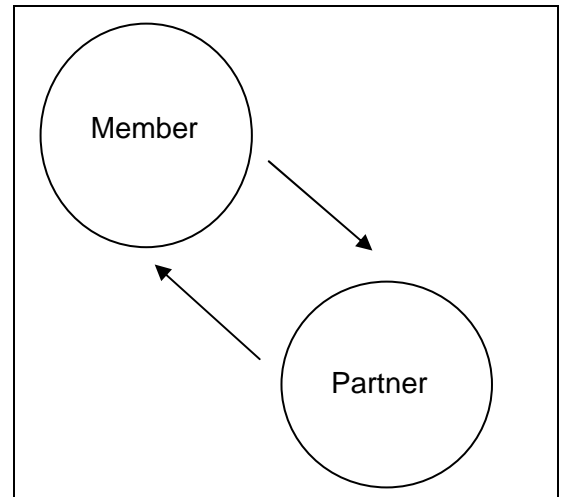
II. Partnership management by the partner organisations [11]

- Improvement of the process of partner identification, assessment and selection; (OD)
- Development of a business plan by the local partner (OD);
- Improvement of participatory working methods at partner level (OD);
- Key partner to decide whether to work in partnership with others (OD);
- Introduction of programme/project cycle management concepts at partner level (HRD/OD);
- Holding by partners of a workshop on the programmatic approach for stakeholders/partners (HRD/ID);
- Development of a common strategy among partners (OD/ID);
- Analysis of funding needs and identification of donors (OD/ID).
- Clear working framework among partners/stakeholders established (ID);
- Improvement of the communication process with partners (ID);
- Development of a Memorandum of Understanding with a government partner (ID);
- Establishment of a network with like minded NGOs (common values) (ID);

In terms of the levels of capacity building, issues to work on were identified in all levels while some touched on more than one level.

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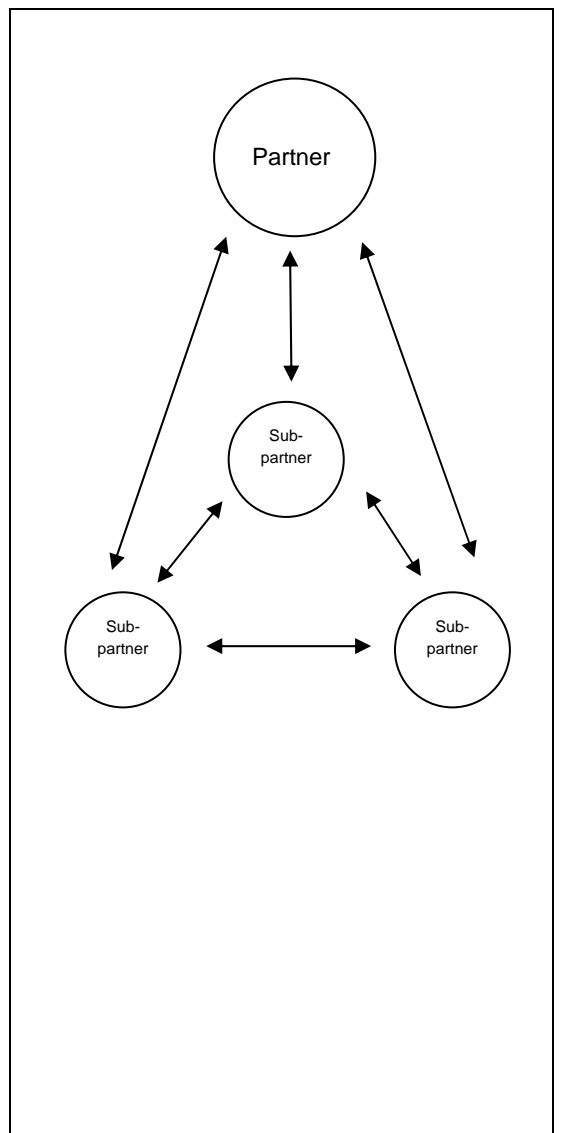
[11]) This concerns the management by the partner organisation of her own (potential) partnership relations.

3.3　　Implementation of the action plans

Despite the various limitations encountered [12] during the implementation of the action plans, most participants appeared to have made good progress with their learning process concerning the practical implications of the programmatic approach.

In order to solicit management support and initiate changes at the strategic level, appointments were made by participants to brief management on the implications of the programmatic approach. Some were successful in acquiring full management support for the programmatic approach from the outset, while others were given the opportunity to first test the idea. The experience with such a pilot would then lead to either a broadening or abandoning of its application within the organisation.

Some organisations also held workshops with current and potential partners on the programmatic approach (incl. programme and project cycle management). Stakeholder meetings were organised by some organisations, both members and partners, to strengthen the participatory character of the preparatory stage and or to improve the quality of the analysis phase of their development effort.

According to the response received to the mid-term questionnaires, most constraints identified concerned the organisational context, including the role of organisational strategy and management [13]; the terms of cooperation agreements; competing priorities at management and work floor level; the level of experience as to working in partnerships; dependence on others, both within or outside the organisation. Unanticipated external influences, methodological challenges and legal limitations also played a constraining role.

Questions emerged concerning the management of partnerships, e.g. concerning identification, assessment and selection of partners. Another point that was raised concerned the "competences" required for partners. Also the question "How to retain staff?" was raised by partners. In some contexts partnerships among NGOs or their role in development efforts are not yet fully accepted or considered useful.

3.4　　The "lessons learned from action planning" day

3.4.1　Description of the process

The second workshop started with a "lessons learned from action planning" day. During this day, the participants presented their work undertaken during the interim period. They subsequently shared "lessons learned" and "challenges" encountered during their experience. These were written on cards, put on the wall, discussed and clustered in plenary.

Actual member-partner groups selected one or more clusters to work on in subgroups. These groups then undertook to generate "suggestions" how to address the ''challenges'' identified, while also identifying possible "risks". Findings were then presented and discussed in plenary. At the end of the day conclusions were drawn as to the main trends and key points that had emerged with regard to the programmatic approach during their experience so far.

3.4.2　Key points flowing from the experience with action plans

Key points [14] for successful implementation of the programmatic approach that were mentioned during this reflection day included the importance of a participatory approach in development efforts, implying due attention (and funding) to the preparatory stage and in particular its identification phase.

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[12]　See annex two on page annex 2 on page 22 for an overview of constraints encountered as reported by participants in the mid-term review.

[13]　During stage two, one group even lost one member organisation and her cooperating partner due to the absence of sufficient management support at the level of the partner organisation.

[14]　See annex three on page 23 for an overview of the key points mentioned.

Another significant point mentioned concerned the central role of strategic and management support within the participating organisations.

A potential successful approach to convince relevant actors of the usefulness of the programmatic approach seemed to be the pilot approach, thus initially applying the programmatic approach to one test case in order to give it a change to show its merits. Its success or failure will then determine the long term applicability of the programmatic approach in that specific context.

Also mentioned was the realisation that the programmatic approach and programme/project cycle management are western concepts that may not be easily adopted in a different cultural context. In this respect the importance of local knowledge and sensitivity for local values was emphasised.

Another point mentioned concerned the possible implications of the use of a label (in this case "programmatic approach") for a new way of working. Rather than using a label, it may in some contexts be more effective to just gradually adjust and improve the way of working without putting a name to it from the start. In these contexts labelling may put people off and trigger resistance while gradual adjustments may be more easily accepted. The importance of several essential skills, such as facilitation, networking, negotiation, delegation and conflict resolution, was also mentioned.

> One participant noted that the experience with the participatory approach,
> during the implementation of the action plan, showed:
>
> **"the existence of much more capacity**
> **amongst participating stakeholders**
> **than initially assumed**"

3.4.3   Evaluation

This first day of workshop two turned out to be a very resourceful one. Participants were eager to share and learn from each other's experiences. As can be seen above, the day produced significant pointers. Based on practical experience and the insights acquired during the session on programme/project cycle management on day one of workshop one, it however also became clear that, despite the fact that training of individuals (activity [15]) can be considered useful in itself, in order to reach beyond the results or outcome level (new knowledge and/or skills acquired), the actual working environment will need to allow and support the application of these acquired insights and skills. Otherwise, the anticipated effect of a "better functioning organisation" is very unlikely to be achieved.

4.   Designing/conceptualising a programme/project

4.1   Description of the process

During the three remaining days of workshop two, the participants were guided through the different steps of Goal Oriented Programme/Project Planning (GOPP) while using their own cases to practice the newly acquired knowledge and skills. Whenever participants worked in subgroups, they worked with their actual real life partner.

At the start of the analysis phase, the concept of "entity"[16] was explained. A "network" analysis provided the participants with a tool to identify beneficiaries and potential partners within the framework of the entity.

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[15]   In terms of the logic of the logical framework analysis.
[16]   "Entity" refers to the focus question of the analysis, the framework within which the analysis and planning will be undertaken.

This exercise also helped with the identification of problems. Problems were identified and causal relationships (cause-effect) between the problems were established leading to the emergence of a problem tree. Participants subsequently learned how to transform problems into objectives and established causal relationships (means-ends). This lead to the emergence of an objective tree. Within this tree, specific clusters of objectives were identified.

Following the completion of the analysis phase of GOPP, participants then learned how to transfer the information produced in objective trees to a logical framework matrix. Due attention was given to the analysis and identification of external conditions and assumptions. After completion of the logical framework matrix - as far as possible given the information available in the workshop context - an action plan was developed from the information in the matrix.

During this workshop, particular attention was dedicated to sustainability issues. An additional evening session was held for interested participants to introduce them to prioritisation techniques that can be used during scoping at the start of the planning phase. During a separate session the role of indicators was explained and their design was practised. Because of their importance in the framework of capacity building, particular attention was given to the difference between process and content indicators.

As was the case during the first workshop, also during this workshop "lessons learned" sessions were held at the start of each day. Participants were asked to write the learning points on cards and add them to their sheet in the "learning points" room. One or more groups presented their "learning points", followed by a brief discussion.

At the end of the workshop a review session was held. During this session participants shared their conclusions and key points identified during their practical experience with the application of the programmatic approach.

4.2   Subjects chosen by participants

Participants worked on the design of programmes or projects, dealing with issues such as: capacity building of elementary schools and schools for medical staff, capacity building of a business network in the field of credit provision, capacity building of organisations essential for improving the employability of gypsies, capacity building of organisations involved in disaster mitigation, capacity building of women groups, capacity building of organisations working in the field of "prevention of (sexual)child abuse",

4.3   Evaluation

All three second workshops showed the benefit of providing a duo or trio of donor- and partner organisations with the opportunity of a joint hands-on experience where tools and techniques of logical framework analysis could be practised and applied to their own specific situation.

From a methodological perspective, it still proved difficult - in the framework of problem and objective analysis - for many participants, to accurately formulate problems and objectives. Since problems are considered the anchor of the solution, this aptitude is crucial for the success of any development effort. The exercise clearly underscored the essence of problem identification with input from the people concerned.

> Asked why the participants had so many difficulties with
> accurate problem identification and formulation,
> one participant concluded:
>
> **"Because we are not the ones who feel the pain"**

The emphasis in the programmatic approach on the achievement of objectives (objective orientation) rather than merely the implementation of activities (activity or input orientation) required a shift in thinking from a number of participants. Or in other words a shift from a supplier orientation towards beneficiaries or end-user orientation as required in the framework of the programmatic approach.

It further became apparent that the duos/trios had grown closer together by their common experience. Issues that would most probably have remained unspoken otherwise, or may have surfaced at a later stage, had become debatable. This had enabled the participants to deal with these issues in a joint effort.

> One participant concluded:
>
> **"We have grown more closer together"**
>
> while yet another pointed out:
>
> **"during the last three months the stakeholders of our project have been more involved than during the last three years"**

5. Lessons learned: Key points and trends highlighted by participants

5.1 Description of the process

During all workshops, but workshop one of workshop cycle one [17], "learning points" sessions were held during each second and following mornings. Participants were asked to reflect on the experience of the previous day and think about the learning points this presented for their specific context. They were requested to write them down on white cards and put them on the flip-over sheet of their member-partner group in the "Learning Points" room.

Following the 15 - 20 minutes spent on this, one to two groups presented their points. This presentation was then followed by a brief discussion of some of the points raised. This most of the time resulted in a lively and useful exchange of views and experiences.

Concluding points as to participants' experience with the programmatic approach were generated, written on white cards, put on the wall in the room, and discussed during the review session of the final afternoon of workshop two [18].

Following the workshops, participants received, as reference material, an overview of all the points raised during the daily "learning points" sessions and the review session at the end of workshop two [19].

5.2 Learning and key points raised.

During above sessions many points were raised, including more general ones, methodological points, points related to behaviour and attitudes and points related to competencies and skills required for a successful application of the programmatic approach [20].

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[17] As mentioned earlier, this practice was started after workshop one of cycle one.

[18] With group one this was only done verbally.

[19] Participants of group one only received these concerning the "Learning Points "sessions after workshop two, they did not receive them with regard to the review session at the end of workshop two.

[20] For a more comprehensive overview see annex 4 on page 24.

An important general learning point that emerged was that application of the programmatic approach should not be seen as exclusively limited to programmes, but that the approach can be applied to projects when a wider more holistic approach is required. Key here is that the programmatic approach is really seen as an approach, a way of thinking and working, and not as a specific form, the focus is on process issues.

Another general point, relevant for the way the programmatic approach may be introduced, is the realisation that the programmatic approach should not be seen as yet another new concept dumped upon the development community by donors, but as a further development and improvement of existing concepts flowing from concerns voiced by local stakeholders. Realisation of this may have a diminutive effect on potential resistance.

As to the methodological dimension, it strongly emerged that dedication of sufficient time to a participatory preparatory process is crucial (investing time, and thus money first, leads to savings later!). In this regard, consistent and participative problem and objectives analysis also emerged as essential to effective application of the programmatic approach as well as the involvement of stakeholders during the remaining phases of the programme/project cycle. Participation of stakeholders during all phases of the programme/project cycle not only enhances local ownership and commitment, but also opens up valuable opportunities for learning.

One participant mentioned

"TRUST THE PEOPLE!"

as key to effective application
of the programmatic approach

As to behavioural and attitudinal aspects, the importance of open mindedness, mutual respect, trust building and maintenance thereof, flexibility and long term commitment emerged as key to the programmatic approach.

Competencies and skills in the following areas were mentioned as key to a successful application of the programmatic approach: networking; partnership management; negotiation; conflict resolution; programme/project cycle management concepts and tools; donor coordination; risk assessment and management; delegation (i.p. from donor to partner and from lead partner to other partners).

5.3   Evaluation

The learning points sessions turned out to be very resourceful meetings. Learning points were now registered, visible and accessible for all participants during the whole workshop. Insights and experiences were exchanged and discussed. This provided an opportunity, not only for clarification and exchange, but also to advance digestion of the newly acquired insights. Peaces appeared to fall into place during these sessions.

The same was true for the review session at the end of the second workshop for groups two and three[21] during which the points raised were now also written on cards and discussed.

Since all participants of these adjusted "learning points" and review sessions received an overview of the points raised (in MsWord), they may from time to time refer to them and contact the writers by email or otherwise if felt useful.

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[21]) During workshop two of group one the review session was only undertaken verbally.

This approach had a much stronger learning impact than the initial just verbal version of the "learning points" sessions as applied during the very first workshop of the trajectory. The same was true for the review sessions of groups two and three at the end of their second workshop.

One participant mentioned

"Use the programmatic approach as a means to an end, not as an end in itself"

while yet another one observed

The programmatic approach is likely to improve the potential for sustainability

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6. Review

Spread over a period of almost one year, a total of 43 participants, originating from 17 PSO member organisations and 18 of their partner organisations from as many countries from Africa, Asia, Latin America and Europe, followed the PSO learning trajectory "Action Planning on the Programmatic Approach". The general objective of the learning process was: "improved capacity of member organisations and their respective partners to apply the programmatic approach to capacity building". The participants were divided over three workshop cycles. Each cycle consisted of two workshops separated by an interim period of approximately 3 months.

During the first workshop of the trajectory, participants analysed their own context in order to determine which adoptions would be required to it in order to effectively apply the programmatic approach. During the interim period between the first and the second workshop, participants addressed selected obstacles identified. At the start of workshop two, experiences were presented and discussed. Subsequently the participants in member-partner formation developed an initial programme/project while applying concepts and tools in the framework of the programmatic approach. Reflecting on the three cycles implemented, what are the lessons learned in terms of the content and process of the PSO workshop cycle on programmatic approaches?

6.1   Content

As to the content of the workshops, the participants learned that a considerable number of obstacles to applying the programmatic approach existed in all three areas of capacity building. Most obstacles were identified at the institutional level, but crucial ones were also identified at the organisational development and human resource development levels.

During the first of these processes, it became obvious to the organising team that the knowledge and skills levels, in particular with regard to development management (e.g. programme/project cycle management (PCM) and related concepts) were limited for a considerable number of participants and rather uneven between them. Some participants had some knowledge with regard to programme/ project cycle management and related concepts, others had some working experience while yet others had never seen these concepts before. Most were not familiar or had very limited experience with analytical tools such as problem and objectives analysis [22].

In particular because of the relevance of an appropriate and consistent use of such concepts and tools for effective application of the programmatic approach, it was therefore decided by the organising team to add opportunities for learning about these concepts and tools to subsequent workshops. This adjustment had a positive effect on the learning process during the remainder of the workshop cycles.

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[22] These findings were confirmed during the second and third workshop cycles.

During the interim period in between workshop one and two, most obstacles addressed concerned the organisational development level while also obstacles were addressed at the human resources development and institutional level. The first level actions concerned in particular strategic and management issues but also organisational structure ones. Closely linked with organisational issues were the human resources development issues (i.p. knowledge and skills upgrading regarding the programmatic approach) addressed by some partners. The institutional issues addressed concerned e.g. development of common strategies (preparatory stage, i.p. the programming/strategy phase) and the establishment of a network of like-minded NGOs.

Subsequently, during the second workshop the participants worked in member-partner formation on the conceptualisation/design of a real project/programme. Although this of course took place in a workshop environment without the actual involvement of the stakeholders, participants were able to apply most of the newly acquired or refreshed concepts and skills.

It was interesting to learn that in all groups, most member-partner combinations initially assumed that they were at the end of the preparatory stage or heading for implementation. However, while analysing the implications of the programmatic approach for their context phase by phase, most participants realised that this was in fact not the case and that much more attention was to be dedicated to the preparatory stages (Programming, Identification and Formulation) of the programme/project cycle than initially assumed. This showed that the process of analysing the context of participants phase by phase was a useful formula. The fact that this was done by a combination of a member and one or more partner organisations amplified this learning effect, since this context provided for reality checks from partner to member and vice versa.

A strong outcome thus seems to be a conviction of the need to dedicate appropriate attention to the preparatory stage of the development effort while facilitating meaningful participation of those involved from the outset. Another important learning point seems to be that accurate and consistent application of methodological tools does have an essential added value, e.g. appropriate problem analysis in the framework of Logical Framework Analysis.

Although many of the participants assumed at the start of the workshop cycle, that their knowledge and skills as to development management instruments and tools (i.p. with regard to project/programme cycle management and Logical Framework Analysis) were up to standard, during the course of the workshops quite a few started to realise that this was in fact not the case and that there was still a lot to be learned. This was true for participants of both member and partner organisations. A question that remains for the PSO Knowledge Centre is whether this situation would be the same for members and partners who have not yet participated in this trajectory.

6.2   Process

While discussing the content above, we already touched upon some process aspects. It seems however useful to further highlight a few. The concept of having member organisations working together with one or two of their partners seems to have paid off handsomely. They were able to learn from each other and build a mutual understanding of each other's situations and perceptions.

Some alterations to the process were made by the organising team following the early stages of the first workshop cycle. The adjustments decided upon concerned: sub-group formation changed from mixed to actual member-partner during obstacle identification and beyond, and format of the learning and review sessions changed from merely verbal to also include written registration of key points. They all seemed to have substantially enriched the experience of the participants.

Having gone through this process together appears to have resulted in a conviction amongst a large majority, if not all, of the participants that close collaboration between them carries a substantial added

value. The participative and interactive approach of the workshops triggered participants' own thinking and accessed and mobilised tacit knowledge that may in a non-interactive approach not have been available for this mutual learning process. The "learning points" sessions, at the start of each second and subsequent day, enabled exchange and further digestion of the lessons learned during the previous day. By introducing a written registration of the learning points, exhibited in the "Learning Points" room, and their distribution after the workshops, these points remained accessible for further reference if needed. This adjustment of the approach appears to have been a successful attempt to minimise the risk of losing lessons learned.

Following the joint identification of obstacles to cooperation between member and partner organisations within the framework of the programmatic approach, they continued working together during stage two to address the most pressing ones. This experience appears to have strengthened their bond and laid the groundwork for further intensified cooperation during and after workshop two.

6.3   Learning needs

Since in all groups participants soon came to the conclusion that - in the framework of their learning process as to the programmatic approach - most attention was to be dedicated first to the preparatory stage of the programme/project cycle, other phases did not get the attention they deserved. Time was just too short to also cover these aspects during this trajectory.

Thus, the last phase of the preparatory stage (the financing/agreement phase) , the implementation phase and monitoring and evaluation did - although touched upon - not yet get the attention desired. Discussion with participants and the evaluation at the end of the cycles indicated the desire amongst participants to also dedicate attention to these phases in the framework of their learning process for the programmatic approach.

In addition to the above, although a thorough learning needs assessment was not undertaken, the experience seems to point at the following attention areas where learning needs seem apparent[23]:

- Conflict management/resolution;
- Delegation of responsibilities;
- Donor coordination.
- Human Resources Management (HRM): entry, performance and exit management.
  The question "How to retain staff?" was specifically raised by partners. This question also referred to the potential financial discontinuity of partners. However, given financial constraints, effective HRM may help retaining people;
- Management of partnerships, e.g. identification, assessment and selection of partners. Another specific point raised concerned the "competences" required for partners;
- Methodological knowledge and skills beyond with regard to programme/project cycle management (PCM) concepts as well as ways how to introduce them in the organisation;
- Negotiation;
- Networking.

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[23] In alphabetical order.

Annex 1. Participating organisations

PSO Memberorganisations	Participants	Partner/s	Participants
Centraal Missie Commissariaat (CMC), Netherlands	1	TRAMA (Projecto Legal) - Brazil; Child Defense Centre Emaus – Brazil.	1 1
Centrum Ontmoeting der Volkeren (COV), Netherlands	3	Churches Health Association of Zambia (CHAZ), Zambia	1
Dorcas Aid International, Netherlands	1	Dorcas Albania Thabatat, Albania.	1 1
FreeVoice, Netherlands	1	The Panos Institute West Africa (PIWA), Senegal	1
Gereformeerde Zendingsbond (GZB) together with Zending van de Gereformeerde Gemeenten (ZGG), Netherlands	1 1	Across, Sudan	1
Interkerkelijke Organisatie voor Ontwikkelings-samenwerking (ICCO) Netherlands with ICCO Nicaragua	3		
Interserve Netherlands	2	Early Childhood Education Centre (ECEC), Nepal.	1
Kerk in Actie/ICCO Emergency Desk, Netherlands	1	Yakkum, Emergency Unit, Indonesia.	1
Medical Committee Netherlands-Vietnam (Representative Office, Vietnam)	1	Department of Science and Training, Ministry of Health, Hanoi, Vietnam.	1
Netherlands Red Cross - Netherlands with Netherlands Red Cross – China	2	Red Cross Society of China, China.	1
Stichting Aktie Strohalm (SAS)	1	Instituto Strohalm de Desenvolvimento Integral (InStroDi), Brazil	1
Tear Fund Netherlands	1	Tear Fd UK Horn of Africa Regional Office, Ethiopia; Meserete Kristos Church Relief & Development Association, Ethiopia.	1 1
Terre des Hommes Netherlands Terre des Hommes, Regional Office, Philippines	1 1	Centre for the Prevention and Treatment of Child Sexual Abuse (CPTCSA), Philippines.	1
Transcultural Psycho-social Organization (TPO), Netherlands	1	TPO Burundi.	1
VSO Netherlands	1	VSO Malawi.	1
Woord en Daad, Netherlands	2	Christian Relief & Development Organisation (CREDO), Burkina Fasso.	1
Subtotal member organisations/ No. of participants	**17 / 25**	**Subtotal partners/ No. of participants**	**18/18**
TOTAL ORGANISATIONS / No. OF PARTICIPANTS	**35 / 43**		

Annex 2.   Constraints encountered by participants while implementing the action plans

According to the response received to the mid-term questionnaires distributed, the participants mentioned the following constraints they encountered during implementation of the action plans:

- Time constraints (both at own and at partner end), daily work pressures and other competing priorities/obligations;
- Dependence on external factors/inputs, e.g. Dependence on co-operation/availability of others (internal and external);
- Degree of commitment/co-operation of essential people not present at the time of planning (e.g. Decision makers); in this respect, the absence of essential stakeholders during the design of the action plan was felt as a constraint;
- Management support for the adoption of the programmatic approach non-existent within the organisation;
- Realisation that one's organisation adopts the programmatic approach much less in practice than initially assumed;
- Realisation of objectives depended on the realisation of one or more of the other objectives included in the action plan;
- Differences of analysis at international and national level;
- Too many objectives and activities identified for the time span of the action plans;
- Limited knowledge regarding the programmatic approach at local level;
- Insufficient support at the donor level for the adoption of the programmatic approach;
- Difficulties in understanding the point of view of the partner;
- Constraints re deciding on the selection of partners, e.g. Key partners;
- Limited knowledge and capacity within the organisation with regard to programme/project cycle management, thus hampering its adoption;
- The way objectives were formulated;
- Designing relevant (process) indicators in the framework of capacity building.
- Limited availability of manpower;
- Difficulties in involving the relevant target group;
- The role and acceptance of ngos as actors in development is sometimes limited or considered uncommon;
- External developments (e.g. Budgetary limitations or difficulties in identifying suitable trainers/consultants).

Questions also surfaced concerning the management of partnerships, e.g. identification, assessment and selection of partners. Another point that was raised concerned the "competences" required for partners. Also the question "How to retain staff?" was raised by partners. In some contexts partnerships among NGOs is not yet fully accepted or considered useful.

Annex 3.   Lessons learned from action planning during the interim period

Key points that emerged during the "lessons learned from action planning" day at the beginning of workshop two included the importance of:

- A participatory approach to decision-making and training;
- The realisation that the programmatic approach and programme/project cycle management are western approaches that may not be easily adopted in a different cultural context – importance of local knowledge, e.g. Ways of communicating with the stakeholders.
- The realisation that in some contexts, labelling the programmatic approach may put people off. Gradually adjusting the existing approach towards the essence of the programmatic approach without putting a label to it, may then be more effective;
- A common understanding among actors of what is meant by the programmatic approach;
- Methodological awareness and skills in the area of development management (e.g. In particular the concepts and tools of programme/project cycle management);
- Due attention for the preparatory stage, in particular the identification phase of the programme/project cycle;
- Training partners on the programmatic approach;
- Strategic and management support within the organisation;
- Ownership, and in particular of local responsibility;
- Capacity building of partner organisation to enable them to assume these responsibilities;
- Coordination;
- Networking skills
- Delegation skills;
- Negotiation skills;
- Facilitation skills;
- Conflict resolution skills;
- Partnership management (assessment, selection etc.);
- Common learning;
- Time consciousness;
- Patience;
- A clear focus;
- Focusing beyond activities;
- The donor as facilitator;
- Funding arrangements;
- Appropriate procedures and systems commensurate with the programmatic approach;
- Balanced relationship between member and partner organisation;
- Developing a monitoring system commensurate with the programmatic approach;
- More compatible format of documentation;
- Being open-minded.

Annex 4. Keypoints to the (successful) application of the programmatic approach

The following points emerged as key to the (successful) application of the programmatic approach:

General
- Application of the programmatic approach is not limited to programmes, but can also be applied to projects. Key here is that the programmatic approach is really seen is an approach, a way of thinking and working, and not as a specific form, the focus is on process issues;
- The programmatic approach should not be seen as yet another new concept dumped upon the development community by donors, but as a further development and improvement of existing concepts flowing from concerns voiced by local stakeholders;
- The programmatic approach can be useful in any development situation;
- The programmatic approach more practical than expected;
- The programmatic approach should not be applied artificially, it needs to fit;
- The preparatory process takes a lot of time, but is very important (investing time first, leads to saving time later!);
- Shared responsibility between donor and partner/s;
- Donor assuming facilitating role;
- Building a good relationship between actors is crucial;
- Effective communication between stakeholders;
- Capacity building crucial;
- Empowerment of local stakeholders;
- Creation of partnerships is a must;
- Effective Networking;
- Conflict resolution mechanisms;
- Effective data gathering;
- Partners' capacity to maintain staff (and their commitment)
- Compatible formats of documentation.

Methodological
- Participation. e.g. involvement of local stakeholders at an early stage of preparation (in particular the identification phase) is crucial, not in the least for ownership and sustainability;
- Identification phase is crucial
- Proper problem analysis crucial (incl. reliable data gathering capacity);
- Logical framework (matrix) should not be seen as a straight jacket, but should be applied flexibly in order to accommodate changing circumstances and needs;
- A Monitoring and Evaluation system geared towards the programmatic approach is crucial;

Behaviour and attitudes
- Open mindedness (also for criticism)
- Capacity to work with organisations and people with other "values";
- Mutual trust building;
- Mutual respect;
- Flexibility;
- Long term commitment (plus maintenance thereof);

Required competencies and skills
- Reliable data gathering capacity;
- Networking skills;
- Negotiation skills;
- Facilitation skills;

- Partnership management skills;
- Conflict resolution skills;
- Sufficient knowledge and experience with the application of programme/project cycle management concepts and tools;
- Donor coordination skills;
- Risk assessment and management skills;
- Delegation skills (i.p. from donor to partner and from lead partner to other partners).