GSIF POLICIES, STANDARDS AND PROCEDURES

Project Cycle Management Procedure

GOOD SHEPHERD INTERNATIONAL FOUNDATION ONLUS

Procedure: Project Cycle Management	**Date of publication: 18th December 2020** **Review: 1**
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1. Introduction

The organizational review of the Good Shepherd International Foundation (GSIF), carried out by the GSIF Senior Management Team (SMT) in 2020, included the revision of the Project Cycle Management (PCM), which comprises of procedures related to the core area of GSIF work: project and programme management.

GSIF SMT has taken this opportunity to review and articulate a step-by-step procedure as guidance for GSIF Program staff and local partners involved in Program and Project Management.

This document serves the purpose of:

- aligning and homogenizing processes within the GSIF team and with the implementing partners;
- visualizing clearly the cross-functional steps included in the cycle of Project Management within GSIF, which require specific attention by all members of GSIF team who are expected to provide contributions to the PCM process.

This procedure doesn't replace the tools that all Program staff s is expected to be familiar with and to use, to prepare and manage projects (LogFrames, Theory of Change, related templates, forms etc).

To design a comprehensive PCM process that reflects GSIF procedures and organizational model, GSIF SMT adopted a Total Quality Management methodology, that helped to map the process and activities included in the PCM, identifying for each step the role of the different functions/positions within the organization.

In this document we present the GSIF PCM diagram with a Glossary and brief explanations of the key steps for better clarity, which is the final output of the process we have followed.

The Cycle of GSIF Project Management according to this procedure is articulated in **three sections**: **Assessment and Design, Management & Implementation, Reporting and Capitalization**, each section is divided into different steps.

2. Scope

This procedure illustrates the tasks deployed by GSIF to manage all the phases of the project cycle. It applies to all projects implemented under the supervision of GSIF at the local, regional or international level, regardless of the thematic area.

3. Application

This procedure applies to all GSIF projects and programmes and is supervised by the PCM Quality (PCMQ) Manager. It defines how Program Manager (PM) and Regional Manager (RM) carry out the activities necessary for the management of the Projects and Programmes, with the support of Program Officers (PO) (where present) and involves the various actors, internal and / or external, interested at different levels of responsibility, contribution and / or support.

This procedure takes into consideration the possibility that any project proposal stems out of a Strategic Plan (at country, Unit or program level), which is the preferred and recommended way of working, or that the proposal is generated in response to a specific need or emergency.

4. Perimeter of the PCM Procedure

In this procedure we describe all activities comprised between the *reception from the local partners of a Local Strategic Plan OR of a specific need /opportunity for funding, up to the capitalization of the project experience.*

This procedure *does not* cover activities related to strategic planning at Unit or program level.

5. Responsibility

The PCMQ Manager is responsible to monitor, disseminate and review the implementation of the processes described in this procedure, ensuring understanding, compliance and adherence to the procedure by all GSIF Program staff.

6. Review

This procedure will be reviewed every 2 years by the PCMQ Manager in collaboration with the SMT and approved by the Director.

7. Tools, Forms and Templates

The following tools, attached to this document, form part of the procedure:

- GSIF Project Proposal Template
- GSIF Reporting Template
- GSIF Guidelines to prepare a Strategic Plan using the Theory of Change

8. Reference to other GSIF Procedures and Documents

- GSIF Financial and Administration Manual
- GSIF Monitoring and Evaluation Manual
- GSIF Mission Development Process

9. Acronyms and Definitions

CFO: GSIF Chief Financial Officer

CLT: Our Lady of Charity of the Good Shepherd - Congregational Leadership Team

COMM&FR: GSIF Communication and Fundraising (Desk Manager)

Concept Note: a summary of a proposal containing a brief description of the idea of the project and the objectives to be pursued

Donor: a person, organization or agency, which donates for the program.

(Donor) Eligibility requirements: conditions that the applicant or a specific proposal must fulfill

ERP: Enterprise Resource Planning - is an integrated management tool that GSIF uses to collect, store, manage, and interpret data with regard to different sets of activities

F&AO: GSIF Finance and Administration Officer

FP: Funding Plan - it is a specific table included in every Strategic Financial Plan for mapping out the sources of funds for the current and estimated future activities of the programme

Funding Cap: total maximum amount available with a specific donor or total maximum number of proposals that can be submitted to a specific donor in a given period of time

GOP: GSIF General Operating Procedures

GSIF: Good Shepherd International Foundation

L&CD: GSIF Learning and Capacity Development (Desk Manager)

LLT: Our Lady of Charity of the Good Shepherd - Local Leadership Team

LogFrame: Logical Framework - planning tool consisting of a matrix which provides an overview of a project's goal, activities and anticipated results. It provides a structure to help specify the components of a project and its activities and for relating them to one another

LP: Local Partner - sisters and partners in mission operating at the local level for project implementation

M&E: Monitoring and Evaluation – is a system used to track and assess the results of the intervention/project/programme

MDO: Mission Development Office

MOU: Memorandum of Understanding - is an agreement between two or more parties, that expresses a convergence of will between the parties, indicating an intended common line of action.

Partners in mission: are staff, volunteers, benefactors, board members, associates, companions, etc. who choose to accept co-responsibility to work collaboratively to forward the mission.

PCM: Project Cycle Management - the process of planning and managing various phases of a project

PCMQ: GSIF Project Cycle Management Quality (Desk Manager)

PM: GSIF Program Manager

PO: GSIF Project Officer

Program: refers to multiple projects aiming to impact in a wider area and with no specific limits of time

Project: a set of activities related to specific outcomes over a specific and determined period of time, usually related to a specific grant

Project Proposal: a document (or a set of documents) with which a specific project is submitted to a donor for funding consideration

Project Report: written recording of project progress (interim) and (final) project results in terms of content, schedule and costs

RM: GSIF Regional Manager

SFP: Strategic Financial Plan - tool that GSIF uses for strategic financial management. It complements the Strategic Plan (below). It is multi-annual and it includes the cost mapping, the forecast timing of the expenses of the budget items, the monthly register of the expenses, the monitoring section of the expenses and the funding plan section

SMT: Senior Management Team – it's the body that supports the GSIF Director in achieving the strategic goals of GSIF by contributing to the accomplishment of its mission. The SMT includes the GSIF Director and all the Desk Managers

SP: Strategic Plan - is the programming document outlining the mission, objectives and strategic areas of intervention of an organisation

Staff: the people who work for an organization or a project/programme

ToC: Theory of Change – is a methodology for planning, participation, and evaluation that is used to promote social change. The Theory of Change defines long-term goals and then maps backward to identify necessary preconditions

10. The procedure

Introduction: GSIF approach to Project Cycle Management

GSIF adopts an **outcome-oriented and rights-based approach** to project development, in line with the best international humanitarian and development practices.

Project proposals prepared by GSIF staff and partners should respond to a broad, long-term strategy, aimed at delivering positive change and fulfilling the Good Shepherd mission, rather than respond to limited, one-off needs or just respond to funding opportunities.

For that reason, GSIF generally requires as a pre-condition that implementing partners develop a long-term Strategic Plan before initiating project proposals and design their projects based on the priorities identified in the Plan.

Strategic planning forms part of the **GSIF Mission Development Process** (attached) and it is not included in this procedure. However, the Strategic plan (SP) and the Strategic Financial Plan (SFP) should always be the starting points of the PCM and (when available) are included in the procedure as INPUTS to start the process.

The SP is generally formulated at the Unit, country or program level by the leadership of the Unit with the support of the local mission development offices, where present, with the assistance of the GSIF team or consultants. The SP is based on a thorough socio-economic analysis of the local context and a needs assessment of the people and communities involved, that defines the expected impact, outcomes, results and activities, complemented by an overall cost-mapping included in the SFP.

GSIF recommends all Units, Mission Development Offices (MDOs), Program and Project managers to adopt the Theory of Change (ToC) or LogFrames and the Human Rights based approach as tools to design the strategy, including impact, goal, outcomes/objectives, results and activities.

All projects prepared by GSIF should be designed based on the contents of and refer to the objectives included in the SP, integrating in part or in full its ToC or LogFrame.

It may happen that a project opportunity arises from a specific need, not included in the SP, or from an emergency situation or an interesting funding opportunity. In such cases GSIF PMs/RMs should discuss the relevance and coherence of the project with the local Unit leadership, the local MDOs (where present) to verify the alignment with GSIF, Unit and Congregation's mission and priorities

In the below description, we indicate the key managerial responsibilities for the various steps.

NB. The activities that the officers are responsible for, particularly for the Program Officer (PO), are indicated next to the PM/RM as (PO). For such activities the PM and RM are the responsible managers, but – depending on the job descriptions of the PO and on the decisions of the line managers- such activities and responsibilities can or cannot be delegated to the PO or to the Financial Officer (F&AO).

Description of the procedure

Section 1 – Assessment and Design

Step number	1.1
Step name	**Assessment of Project proposals and background preparation**
Input	Information on a funding opportunity by GSIF or Local Partners Reporting a specific need emerged or emergency situation requiring response in the field by CLT or Local Partner
Output	Concept note
Organizational roles responsible	PM, RM, Local Partner (LP)
Summary of activities	PM/RM receives and assesses the information regarding a project proposal or a funding opportunity. If GSIF does not have an active partnership in the country and there is no Strategic Plan at the Unit or program level, the PM/RM proposes to the local leadership and then supervises at least a basic needs assessment of the target group and verifies the compatibility of the proposal with the Congregational direction statements, the Unit priorities, the GSIF Strategic Plan and Budget. Based on the results of the assessment, in coordination with the field, PM/RM together with LP drafts a concept note. This applies also to emergency applications (including for countries with active partnerships and/or Strategic Plan). If GSIF has an active partnership in the country and there is a Strategic Plan (SP) at Unit, country or program level in place, the PM/RM verifies compatibility and alignment of the project proposal with the local Strategic & Financial Plan (SFP).
Integration points with other roles	GSIF Director verifies the allocation of the funding requests to the various donors to avoid overlaps of applications to the same donor and provides inputs to the PM / RM to proceed with the preparation of the application
Tools	Grants research tools (grant seeking reference books, online research engines, i.e. Funds4NGOs) Needs assessment tools GSIF or donors' templates concept notes

Step number	1.2
Step name	**Preparation of the funding plan**
Input	Cost mapping of activities under the program /strategic plan/project Donors' information (eligibility requirements, funding cap, funding history and priorities)
Output	Strategic & Financial Plan Funding Plan Section Validated
Organizational roles responsible	PM, RM, LP
Summary of activities	Based on the funding opportunities signaled and on the project proposals, the PM/RM elaborates the FP section of the SFP to list prospect and current donors as sources of funding to cover the costs mapped in the SFP, in coordination with the LP, the Finance and Administration offices and the other functions involved. The LP shares the information on active funding and prospect donors available to contact to decide with the PM/RM on funding applications and to fill in the FP section. The PM / RM in collaboration with the LP, ensures the finalization and validation of the FP section in the Local SFP. Once ready, the PM/RM sends the FP Section to the functions involved (CFO, COMM & FR, Director, PCMQ)
Integration points with other roles	The CFO checks the consistency between the FP Section and the GSIF Financial Strategy and provides inputs to the PM/ RM. Then the CFO and the PCMQ Manager update the overall GSIF funding plan with the list of project proposal and integrate the Funding Plans section into the general GSIF Funding Plan and sends it to the Director. The PCMQ Manager monitors regularly the allocation of the funding proposals to the various donors to verify overlaps or over-funding and provides information to the Director and to the CFO. The COMM & FR Manager plans any ad hoc communication campaigns aimed at fundraising at the request of the PM / RM to complement the funding plan of the project, if/when applications to donors may not cover all the costs or when fundraising campaigns opportunities arise. The Director shares the general Funding Plan with the SMT during regular bi-tri/annual SMT meetings. Based on the indications of the general FP, the COMM &FR Manager activates the ad hoc one-to-many fundraising campaigns to complement the funding strategy, filling possible gaps.
Tools	Template of SFP, including FP section; F&A policies General Operating procedures (GOP) for cost mapping and budgeting

Step number	1.3
Step name	**Preparation of the project proposal(s)**
Input	Needs assessment, context analysis, market research and other data at country/thematic and project level Program/project strategy; Theory of Change (ToC); LogFrame (or equivalent description of the project, including Impact/Goal, Outcomes/Objectives, Results, Activities, Indicators, Means of Verification, Assumptions, Monitoring and Evaluation, Risks and methods)
Output	Full project proposal saved in the digital archive with all the supporting documents Record in ERP with all Projects data LP trained on Theory of Change and rights-based approach (where applicable)
Organizational roles responsible	PM/RM, LP
Summary of activities	PM/RM (PO) provides the LP with the guidelines, formats and all the elements necessary to prepare the Project Proposal to be sent to the donor (s) identified in the FP section. Where applicable, capacity development should be provided to LP on the ToC, the rights-based approach, formulation of the logframe and budget which will feed into the completion of the grant application form. The local partner drafts the Project Proposal by preparing a project LogFrame (or similar instrument) in articulates objectives, results, indicators according to what emerged from the analysis of local needs in SP or in the Project Document. The PM/RM (PO) ensures the **finalization of the Project Proposal** according to the **eligibility requirements** of the donor by coordinating with the LP and CFO; then c**ompletes the Project Proposal** by collecting all the necessary documents from the GSIF functions (Finance, COMM & FR, L&CD) and/or the Congregational bodies (Local Leadership Team, CLT[1]) and from stakeholders external[2] to GSIF Project Proposal. The completed project proposal should be agreed upon by the leadership of the unit with clear lines of accountability on project and grant management. T**he Project Proposal is submitted to the donors** (according to the donor's instructions, the submission can be done by the PM, RM or LP). After submitting the proposal, the PM/RM ensures that the Project Proposal record is created or updated in the GSIF Information System (ERP).
Integration points with other roles	The CFO checks the Budget related to the Project Proposal and its compliance with the eligibility requirements and the Finance & Administration Officer (F&AO) checks the Project Proposal Budget with the FP and makes any improvements / corrections.
Tools	GSIF template for project proposals and budgets Donors templates, if available

[1] I.e. letters of approval if required by the donor
[2] I.e. letters of support from local Bishop if required by the donor

Section 2 - Management and implementation of the Project

Step number	2.1
Step name	**Project kick-off and funding disbursement**
Input	Feedback from the donor can be: YES, approved without changes; Yes, approved WITH CHANGES, which required to review the proposal NO: the proposal is rejected.
Output	Updated SFP Updated record in ERP for the project Signed Project agreement/Contract or MoU stored on the digital and physical archive (if necessary or requested by donor) Fund disbursement request approved Updated ERP financial information Action Plan LP trained on SFP (where applicable)
Organizational roles responsible	PM/RM (PO) and LP
Summary of activities	If the proposal is approved without changes, the PM/RM (PO) prepares the official communications and the necessary contracts / different levels agreements, for signature (Project Agreement, MoU) and the PM/RM (PO) ensures that the record on the Information System (ERP) and in the SFP is updated. Where applicable, capacity development should be provided on the SFP and related grant management requirements (i.e. frequency of reporting, vouchers / receipts, use of exchange rate, monitoring of budget against actions plans etc.) If the proposal is approved with required changes, the PM/RM (PO) works with the LP to update the budget and narrative and submits to the donor for approval. The LP elaborates the request for the fund disbursement using the specific format, and sends it to the PM and to the CFO (F&AO) The PM/RM checks the progress of the fundraising campaign (if one had been initiated for the project) and updates the Funding Plan section in the Strategic Financial Plan ERP. The PM/RM collaborates with the LP for the kickoff of the project by sharing GSIF and/or donor documents and guidelines (where available). The LP drafts the Action Plan of the Project, if not already prepared for the Project Proposal, or updates the existing one submitted to the donor, where necessary.
Integration points with other roles	GSIF Director signs the contract with the donor and GSIF Executive assistant archives it. The CFO verifies and approves the request for the fund disbursement submitted by the PM/RM and the LP filling in the disbursement form and follows up on the payment according to the GSIF General Operating Procedures (GOP) (email or phone calls) The F&AO updates the information system (ERP) with financial information about the disbursement (Bank transfer) The Comm&FR Manager monitors the progress of the fundraising campaign and evaluates its results according to the fundraising indicators in order to adjust if necessary
Tools	Funding disbursement form SFP template Template actions plan (TBD) or LogFrame / M&E Framework Timetable / Action Plan/ Procurement Plan/ Budget Reporting Format Specific documents requested by the donor

Step number	2.2
Step name	**Project implementation and monitoring**
Input	Action Plan LP trained on implementation of M&E framework
Output	Summary of M&E data (dashboard) Updated ERP records Intermediate narrative reports (where required by the donor)
Organizational roles responsible	PM, RM, PO, LP
Summary of activities	The PR/RM (PO) ensures the regular updating of the SFP The PM/RM (PO) ensures that the local partner is accompanied in the implementation of the project, remotely and through field visits. Where applicable, conduct capacity development sessions on project management according to the M&E framework (which will include the type of documentation and record keeping necessary at field level as per the indicators, the frequency of reporting to GSIF, etc) The local partner takes care of the implementation of the different phases of the project, according to the agreed action plan The PM/RM (PO) ensures the compliance of the project with M&E tools as per the M&E Manual. In case of deviations from the expected results, accompanies the local partner in the definition of corrective actions. The LP collects and shares the project data with the PM / RM according to the M&E framework (integrated in the LogFrame/ToC) using the tools provided by the PCMQ Manager.
Integration points with other roles	The F&AO regularly updates the accounting and the reclassification of the projects on ERP, by coordinating with COMM &FR and PM / RM and provides support in updating the SFP. The PCMQ Manager receives the updated project data via the Information system (ERP) by the PM/RM (PO). These data are then elaborated and aggregated and key findings are provided to the Director and the SMT.
Tools	WeTransfer Google drive ERP or other tool to be defined to share M&E data (dashboard)

Step number	2.3
Step name	**Verify compliance with GSIF policies and procedures for PCM, F&A, GOP, Child Safeguarding**
Input	Data from the projects (using ERP or other system)
Output	Audit reports
Organizational roles responsible	PCMQ Manager PM/RM (PO) Child Safeguarding Focal Point
Summary of activities	The PCMQ Manager periodically carries out internal audits to verify the alignment of the project management with the PCM procedure; the PCMQ Manager develops and monitors the indicators of the PCM process necessary to feed the continuous Improvement process; the PCMQ Manager shares best practices by involving the SMT and RM. The Child Safeguarding Focal Point is responsible to ensure that the PM/RM and local partner are aware of and have implemented the conditions to comply with the GSIF Child Safeguarding policy according to the policy provisions throughout the PCM procedure. The LP works for the realization of the project in compliance with the GSIF policies and procedures and the requirements of the donor. PM/RM and LP are responsible to collaborate with the PCMQ Manager to provide information and review together the PCM procedure. During the cycle of the project, the PM/RM is responsible to ensure general compliance with the GOP (General Operating Procedures) and with the requirements of the donor and to activate the related processes in case of anomaly. PM/RM ensures also compliance with the GSIF F&A Policy and with the donor's requirements. They activate the related processes in the event of anomalies.
Integration points with other roles	The CFO is consulted by and provides the necessary support to the PM/RM in relation to needs, anomalies or difficulties in the implementation and verification of alignment with the GOP and for the F&A management that may emerge during the cycle of the project.
Tools	GSIF PCM procedure GSIF GOP and F&A procedure GSIF Child Safeguarding policies Congregation / Province Child Safeguarding policies Donor’s guidelines (which may also include child safeguarding policies)

Step number	2.4
Step name	**Project financial management**
Input	SFP Accountancy of the project Project bank transfer/financial transactions details (ERP)
Output	Relevant financial and admin supporting documents saved in GSIF information system (ERP) and archive Updated SFP Updated GSIF general financial framework Intermediate financial report(s) submitted to donor(s) Updated record in ERP for the project Relevant project documents stored in GSIF digital archive
Organizational roles responsible	PM/RM (PO) and LP
Summary of activities	The LP updates the SPF with all the project accountancy details and financial information, and provides the PM / RM (PO) and the F&AO with the supporting documents, in compliance with the F&A Procedure and the donor's requirements; the PM/RM checks the financial information provided by the local partner, including samples of the supporting documents, and supports the partner where necessary in the preparation of the accounting and input in the SFP. The CFO and F&AO conduct sample double checks on the financial reports and documents provided by the PM/RM. The PM/RM (PO) periodically monitors the level of expenditure of the projects to reduce and/or fix deviations from planned (underspending, overspending, etc.). The CFO and F&AO support the PM / RM (PO) in the financial decisions concerning the project, i.e. corrective actions, movements across budget lines, exchange rates mitigation. The PM/RM (PO) throughout the project, in collaboration with the CFO and the COMM & FR Manager, coordinate with the LP and with the donor, ensuring that official communications and intermediate financial reports are prepared and submitted in line with the donor's requirements. PM/RM (PO) ensures that the record of the project in the information system (ERP) is updated and relevant documents are stored in GSIF archive. The F&AO supports the PM / RM (PO) in the preparation of the intermediate reporting to the donor. The CFO does a final double check of the financial report with the donors' requirements before it is submitted to the donor.
Integration points with other roles	The CFO (who can delegate the F&AO) is responsible to double check the financial information provided by the LP and reviewed by the PM/RM through the SFP updates, and he/she is also responsible to double check compliance and provide support to the PM/RM and to the LP for all matters related to financial management of the project. The CFO is also responsible to use the information on the individual projects to prepare quarterly an update of the general GSIF Strategic Financial Plan, based on the information provided by the PM/RM and local partners. CFO shared with the Director and the SMT the updated to plan and implement follow-up fundraising strategy and/or other preventive / corrective actions to support the financial sustainability of the projects, if necessary.
Tools	Wetransfer or other tools to send large files. Google Drive. ERP - GSIF archive (Sharepoint)

Step number	2.5
Step name	**Project communication**
Input	Audio-visual, written materials from the project
Output	Projects' presentations and other communication materials for the project
Organizational roles responsible	COMM & FR Manager
Summary of activities	The COMM & FR Manager develops formats and contents to support the PM/RM in project communication, according to the donor's requirements. The COMM & FR Manager supervises the elaboration of the institutional and project communication material on the different channels (media, web and social). The PM/RM provides the COMM & FR Manager with project information, stories and photographic / video material, throughout the project.
Integration points with other roles	PM/RM and LP provide information on the project and audio-video materials. Director approves project communication materials that go to major donors.
Tools	Communication tools, templates and standards provided by COMM & FR Manager including consent forms from the participants

Step number	2.6
Step name	**Final reporting**
Input	Data and documents from the local partners Summary of M&E data (dashboard) and ERP data
Output	Project closing reports and supporting documents submitted to the donor. Depending on donor's requirements this can include: Narrative Report, Financial Report Audit or supporting documents; Monitoring data; Final Evaluation; Letter of approval of Unit Leader - NB. The documents will be integrated in accordance with the complexity of the project and the requirements of the donor Updated M&E data in the information system Updated ERP records
Organizational roles responsible	PM/RM (PO), LP
Summary of activities	PM/RM (PO) provides the LP with guidelines, format and all the elements necessary for processing the project closing report. The Local partner takes care of drafting of the project FINAL reports by collecting the necessary information at field level. The CFO and the F&AO provide support in the drafting of the financial reports for the closure of the project. PM/RM (PO) ensures the finalization of the reports and all the closing documents of the project according to the requirement of the donor, in coordination with the LP and the CFO/F&AO. PM and RM (PO) upload all the documents connected to the final report in the information system and a notification is (automatically) sent to the PCMQ Manager. Finalize the final report by gathering all the necessary documents from the GSIF and Congregational functions (LP, Finance, COMM & FR, L&CD, LLT, CLT) and from external stakeholders if necessary, according to the requirements of the donor. PM/RM submits the report and the closing documents of the project to the donor (according to the donor's instructions, sending can be done by HQ in Rome, RM or LM with a sign-off letter by the Project holder, which can be GSIF Director, Unit leader or PM, depending on what was agreed with the donor in the approved project). Finally, once submitted to the donor, the PM/RM (PO) updates the project record in the information system (ERP) and store the documents in the GSIF digital archive.

Integration points with other roles	PCMQ receives a notification of project closing report data from PM / RM via Information system
Tools	GSIF report templates or donors' report templates Information system for M&E data collection (TBD) Donor's reporting template GSIF M&E data collection tools SFP

Section 3 – Dissemination and capitalization of the Project

Step number	3.1
Step name	**Dissemination of the project**
Input	Contents from the project report
Output	Updated info on the project in GSIF communication materials and on GSIF media channels (website, annual report)
Organizational roles responsible	PM/RM, LP, COMM & FR Manager
Summary of activities	PM/RM (PO) provides results, stories and audio-video material on the project to COMM & FR Manager and shares the project experience within the SMT and shares the lesson learned in terms of content and process. The COMM & FR Manager ensures the elaboration of the institutional and project communication material on the different channels (media, web and social)
Integration points with other roles	The Director approves the communication materials before publication/dissemination
Tools	Templates for audio-video or written materials (case studies, profiles, interviews) provided by the COMM & FR

Step number	3.2
Step name	**Capitalization of the project**
Input	Contents from the project report and external evaluations (if available)
Output	Documents reporting recommendations on lessons learned, analysis and documentation of promising/good practices for dissemination and/or learning.
Organizational roles responsible	PM/RM, LP, COMM & FR Manager

Summary of activities	PM/RM shares a general summary of projects' experience with the SMT and the lesson learned in terms of content and process and discusses what is relevant with the LP to ensure integration of the project data / results in the M&E Framework of the Program and / or the local SP to indicate / solicit corrective actions / assessments / reprogramming. The COMM & FR Manager and the L&CD Manager receive inputs from the project experience that can be used to prepare documentation of good practices, develop further research or systematize models of interventions as dissemination or learning materials.
Integration points with other roles	Members of the SMT to discuss and provide inputs for the capitalization process and elaboration of materials. The Director approves any materials before publication and dissemination.
Tools	Templates for audio-video or written materials (case studies, profiles, interviews) provided by the COMM & FR Manager

Annexes

- GSIF Project Proposal Template
- GSIF Report Template
- Guide for Strategic Planning for the Mission
- Developing a Theory of Change: a practical guide for the Good Shepherd International Foundation.
- Mission Development Process