



COMMUNITY-BASED DEVELOPMENT PLANNING

Based on the experience
and learning from
the Communities Leading
Development Project in
Guatemala



GUIDE

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GUIDE



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Introduction

In the seven-year period between 2016 and 2023, USAID and CRS implemented the Communities Leading Development (CLD) Project. This project worked intensively with more than 200 rural communities in the Western Highlands of Guatemala, building their capacity to lead a highly participatory and inclusive process to define a vision for their communities' long-term development and then mobilize resources to respond to their top development priorities. The CLD Project facilitated community-based development planning that resulted in 203 Community Development Plans, collectively representing the participation of 27,652 community members (38% women), the implementation of 627 focus groups and 378 community assembly meetings and more than \$325,000 in community leverage contributions (considering the time of community members invested in the process). In parallel, more than 3,500 community leaders (both official and informal community leaders) participated in a training program to strengthen their capacities to lead community-based development planning and subsequently design and manage projects responsive to the Community Development Plans.

Once finalized, the Community Development Plans collectively became the roadmap for CLD resource mobilization efforts. The project registered 762 completed projects responding to community defined priorities, directly benefitting 17,796 households. Critically, the communities used their Community Development Plans to influence public and private investment in line with their own priorities. A total of \$46.5 million was registered in cash and in-kind contributions from the private sector (56%), the public sector (28%), the communities themselves (10%) and the international cooperation (6%) to implement the Community Development Plans. The plans were such an effective resource mobilization tool that the collective efforts promoted by the project achieved \$1.29 in leveraged resources for every \$1.00 of USAID investment.

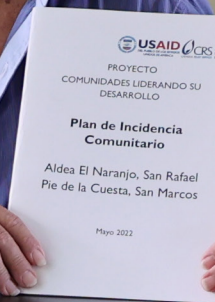
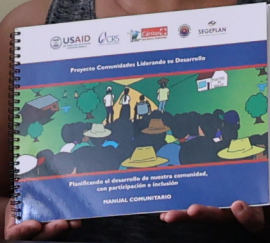
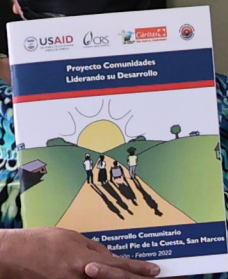
An alliance with Guatemalan Government's General Secretariat of Planning and Programming (SEGEPLAN) has led to SEGEPLAN adopting CLD's methodology and tools for community-based development planning as part of their own suite of planning resources. SEGEPLAN previously offered methodologies and tools for planning processes from the national level down to the municipal level, but notably lacked such guidance for the community level. SEGEPLAN's adoption of the methodology and tools is also a means for community level development planning to formally feed up to higher levels of government for development planning and decision-making with regards to investment of public resources.

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One of the main challenges of the community-based development planning methodology used by CLD was the significant time investment required by project staff, community leaders and other participants in the process. The purpose of this guidance document is to present a simplified process for community-based development planning that can reasonably be implemented in four months or less (thereby requiring fewer resources to implement) and that takes a ‘good enough’ approach to consensus building on community priorities needed to catalyze sustainable community development. This guidance document was developed based on lessons learned from the field, considering the elements that were most valued by the communities, strategies to maintain high levels of community interest and participation and opportunities to streamline yet still yield high-quality products. As such, this guidance document outlines a community-based development planning methodology that is adapted based on the learning from the CLD Project. Throughout the document, links are provided to CLD and other CRS manuals, tools and examples¹, with the understanding that users of this guidance document will adapt them for different contexts and opportunities.

This guidance document is primarily oriented to 1) senior technical and business development staff with interest in practical guidance on incorporating community-based development planning into future proposals and strategies, and 2) technical staff tasked with applying and adapting the guidance to the needs of a particular population, sectoral focus, etc. The remainder of this document is dedicated to describing the links between community-based development planning and CRS Program Quality Standards, step-by-step guidance for implementing the process and operational and budgeting guidance.

¹ Some CLD manuals, tools and examples are only available in Spanish.



Community-Based Development Planning Program Quality Standards

The essence of community-based development planning rests upon four core principles that put into action the corresponding [Program Quality Standards](#) implemented by CRS. As such, this approach serves as a practical example of how to operationalize these standards.



Social Cohesion

Community-based development planning is a critical opportunity to build social cohesion within the community by establishing a mechanism through which different social groups are open to expressing their perspectives and to listening to the perspectives of others. Likewise, community-based development planning must be oriented to building bridges between the community and public and private allies to equip the community with the relationships to pursue their long-term development vision. As such, the planning process is designed to place human relationships at the center, fomenting the orientation towards the common good of the community.

In practice, the level of commitment by individual families to the successful implementation of community-prioritized projects tends to be very high; the resulting improvements to family well-being and to social cohesion within the community serve as important factors that root families to their communities over the long term.



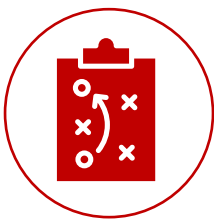
Equity and Inclusion

Each community represents a unique population with regards to culture, history, language and socio-economic factors. And within each community, there is a diversity of individuals with different experiences and perspectives and unique needs and resources. The CLD approach seeks to harness the unique characteristics of each community and promote the understanding that the diversity within the community is an asset that is optimized with genuine mechanisms for inclusive participation in community planning processes. Equitable access to the planning process by women, youth and other marginalized and vulnerable groups, through direct participation or accountable representation, is critical to quality outcomes.



Local Leadership

Community-based development planning rests firmly on the belief that the community is the social unit best equipped to define and pursue its development vision. In this sense, the CLD Project offered tools and support with facilitation, with the goal of preparing diverse community leaders with the knowledge and skills to continue the work over the long-term. Community-based development planning foments local leadership for action, accountability and results.



Strategic Focus

The CLD approach to community-based development planning is holistic by design, encouraging communities to look beyond the first layer of needs and opportunities that are perhaps the easiest to identify and explore the needs of marginal and vulnerable groups, opportunities that have not yet been fully capitalized and evolving risks that may be more difficult to understand. The community-based development planning process seeks to allow each community to explore who they are as a community, how the community is currently doing and envision the community they want to be in the future. In this manner, the process supports communities to address the priority issues necessary to bring about sustainable positive change in the local context.

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Community-Based Development Planning, Step-by-Step

This section describes each of the three stages and eight steps of the community-based development planning process, including the objective, description, products, estimated time for key activities, CLD lessons learned, recommendations and tips and links to CLD and other CRS guidance and examples for each step. Please note that current or future projects and initiatives would need to: 1) adapt existing or develop new detailed methodological guides for each step and validate these guides in the field 2) adapt the existing or develop a new format to be used to present each community's plan and validate the format. Ideally, a project or initiative would initially work with a small number of communities to pilot the overall methodology, the detailed methodological guides by step and the plan format, to allow the project team to incorporate any needed adjustments prior to rolling out the process with a larger group of communities. It is critical that field staff that will facilitate the process and accompany the communities have strong facilitation skills. These staff members should participate in simulation exercises and practice sessions for all steps in the process so they are well prepared for the important job of supporting the communities.

By and large, CLD worked with rural *communities*² recognized as administrative units by the Guatemalan Government's National Statistics Institute. However, CLD considers that the community-based development planning process can be used with *communities* that are not government administrative units, including groups of people tied together because of ethnic, religious, cultural or other reasons. Working with communities that are recognized as administrative units may be most strategic for planning purposes and alignment to public resources.

² CLD communities include a range of administrative units, classified according to population size and location. CLD communities range in size from approximately 100 to 6,000+ people, with the average size being approximately 1,000 people.

STAGE 1: ASSESS includes three steps, starting with preparatory actions in the community and continuing through the community's assessment of their past and present, including present day challenges and opportunities to prioritize for action. This stage takes approximately nine to twelve days per community to complete³.



Get ready



Understand our past and present



Prioritize and understand our challenges and opportunities

STAGE 2: PLAN includes three steps, starting with the development of an action plan and continuing through the preparation of the digital plan document and obtaining official approval from the community. This stage takes approximately seven to nine days per community to complete. This stage concludes the *core planning period* of this process (the core planning period spans the six steps of Stages 1 and 2 that lead the community to having their approved plan).



Develop an action plan



Pull it all together in a plan



Share the plan widely

STAGE 3: IMPLEMENT includes two steps, focused on using the plan to mobilize resources for the implementation of priority projects, as well as monitoring, learning and adapting based on progress. The time estimate for this stage is variable, given that these steps represent long-term actions by the community (that can be supported and accompanied in the shorter term as is feasible by the project or initiative).



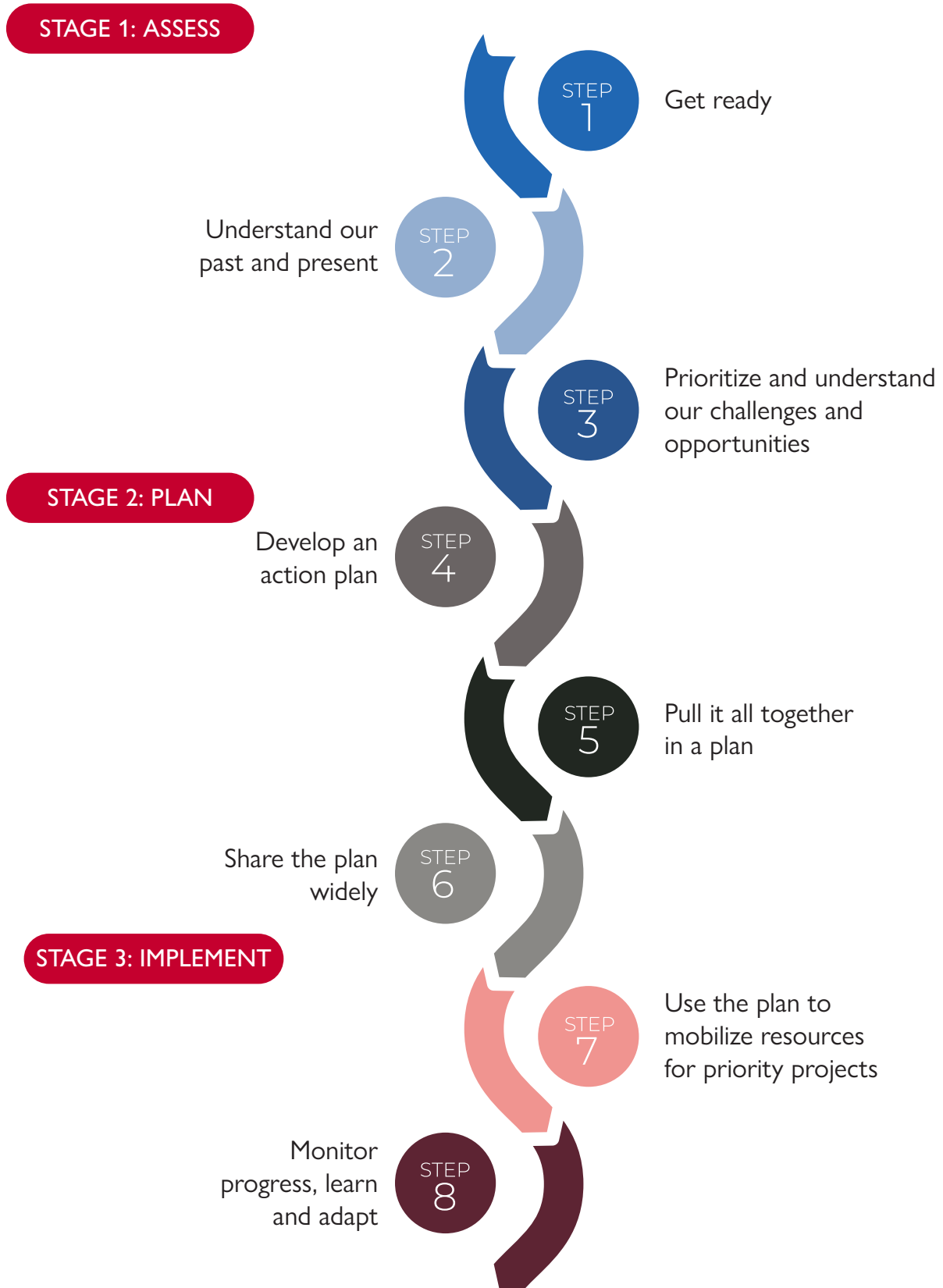
Use the plan to mobilize resources for priority projects



Monitor progress, learn and adapt

³ See the [Operational and Budgeting Guidance](#) section with more detail on time estimates.

Community-Based Development Planning



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DE DESARROLLO COMUNITARIO



PROYECTO COMUNIDADES LIDERANDO SU DESARROLLO



Presentación

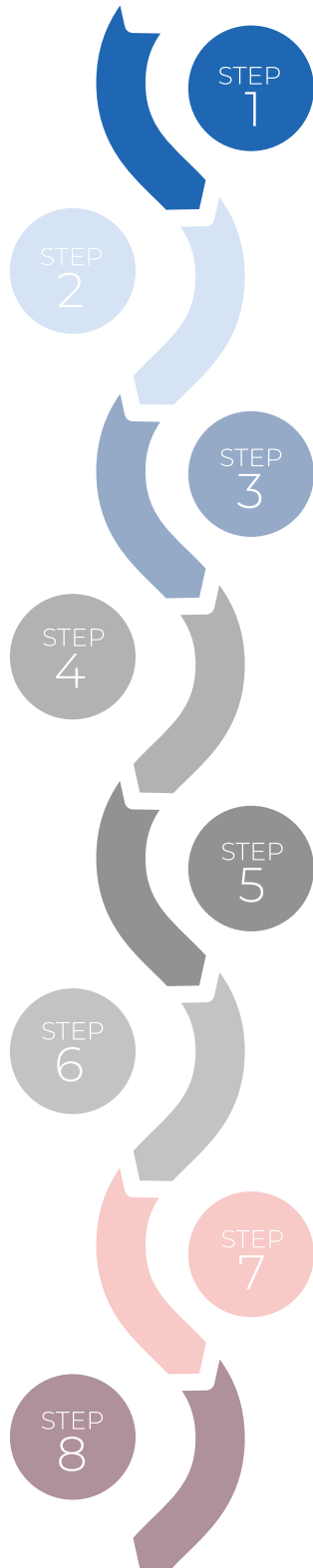
Los planes de desarrollo comunitario realizados en las 69 comunidades del departamento de Huehuetenango fueron construidos con participación de todas y todos, fueron construidos con participación del Consejo Comunitario de Desarrollo, haciendo valer su función que establece el artículo 14 de la Ley de Consejos de Desarrollo Urbano y Rural (decreto 11-2002) de "Formular las políticas, planes, programas y proyectos de desarrollo de las comunidades, con base en la priorización de sus necesidades, problemas y soluciones para su incorporación en las políticas, planes, programas y proyectos de desarrollo del municipio" apoyado por el Sistema Nacional de Consejos Comunitarios de Desarrollo con participación ciudadana.

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STAGE 1: ASSESS

STEP 1: GET READY



Objective: Set the stage for the community to engage in the community-based development planning process.



Description: Community leaders and all groups in the community that should have a voice in development planning are informed about the initiative and make the decision to participate in the process. A core group is identified to lead the process, and this core group agrees to their roles and responsibilities and commits to working with the whole community. Government authorities are also encouraged to engage with the process. With CLD, the Community Development Council (COCODES) of each community took the leadership role of the community-based development planning process.

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Products	Estimated time for key activities	Total time required* of one Planning Field Officer for each community
Creation of a participation mechanism and agreed upon roles and responsibilities	Meeting with community leaders and/or general community assembly: 2-3 hours Meeting with technical staff from local government: 1 hour	2-3 days *Includes preparation work, travel time, time in the community and systematizing results. See the Operational and Budgeting Guidance section for more detail on time estimates.
Actor map including community members and local government staff that are relevant to the planning process	Meeting with community leaders: 2 hours	



CLD lessons learned: At the outset of its community development planning process, the CLD Project established several conditions required to be met for the community to begin its planning process. As an example, one of these conditions was the formation of a Planning Commission to operate under the COCODES structure, to lead the planning process. However, the project team learned that the creation of this commission added little value and the COCODES preferred to lead the process directly. Based on these learnings, the CLD Project recommends streamlining community-level preparation to focus on the two products described above. In Guatemala, the ‘core group’ would most often be the COCODES or one of its established commissions, while focus groups and other activities would include representatives of different social groups in the community.

Simultaneous to the community-based development planning process, the CLD Project implemented two complementary processes:

- A Strategic Communication Plan, including a social and behavior change strategy, that sought to open opportunities for participation in COCODES and other community leadership structures to people that are traditionally excluded (particularly women and youth) and to promote the importance of each community member’s voice in the planning process. This strategy was critical to ensure that the planning process was genuinely participatory and inclusive, and the resulting plans reflected the priorities of the entire community.
- A capacity strengthening program designed for both official and informal community leaders, to prepare them to play strong leadership roles in the planning process, in project design, implementation and monitoring as well as resource mobilization. Given the turnover of official community leadership, the CLD team learned the importance of ongoing capacity strengthening for community leadership throughout the course of project implementation.



Recommendations and tips:

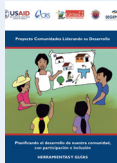
- CLD recommends identifying two to three Community Facilitators for each community. The Community Facilitators are community members or leaders that receive additional training to support and co-facilitate the planning process under the guidance of project staff. See the Operational and Budgeting Guidance section below for a basic description of the role and candidate profile. The support of Community Facilitators can reduce the amount of time needed for project staff to dedicate to the planning process in each community and they become sustainable resources for community development planning, project design, implementation and monitoring and resource mobilization efforts.
- CLD recommends working with the existing leadership structure in the community. Given the importance of community-based development planning, this process tends to take precedence in the group's agenda for the core planning period. COCODES were typically able to dedicate two to three hours per week (or the equivalent time over the course of a month) to the process.



Links to CLD and other guidance and examples:



[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Manual Comunitario, Primera parte: ¿Por qué es importante nuestra comunidad?, pp. 9-16, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)



[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Herramientas y Guías, Herramienta No.1 Formación de Comisión de Planificación Comunitaria, pp. 5-11, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)



[Nuestra Experiencia en los Planes de Desarrollo Comunitario, Sección I: Poniendo en marcha nuestros planes de desarrollo, pp. 9-19, Proyecto Comunidades Liderando su Desarrollo, 2023.](#)



[CLD Strategic Communication Plan, pp. 18-25, CRS, 2021.](#)



[Guide to Facilitating Community-Led Disaster Risk Management \(CLDRM\), Process 1: Build Inclusive Foundations for CLDRM, CRS, 2017.](#)

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Miguel

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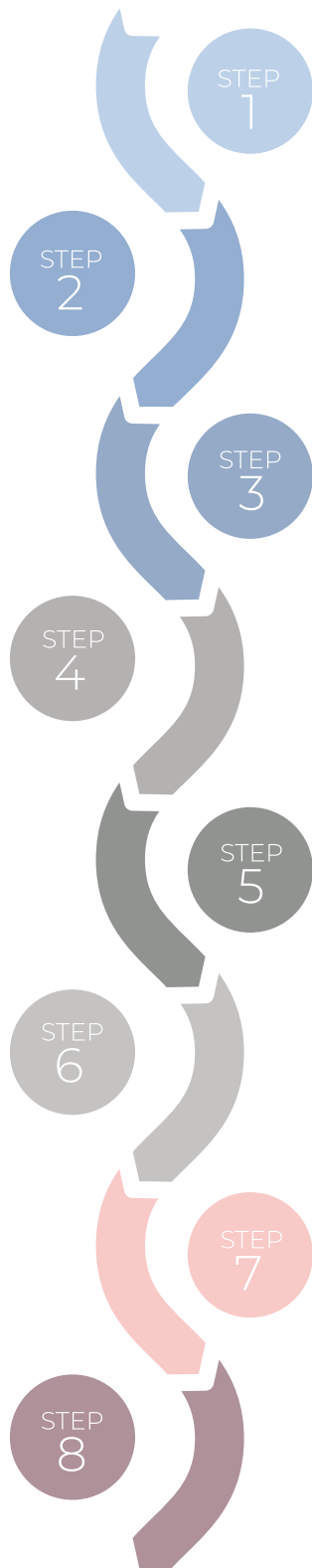
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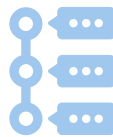
Órgano de Coordinación del COCODE

STAGE 1: ASSESS

STEP 2: UNDERSTAND OUR PAST AND PRESENT



Objective: Develop a common understanding of the community's history and how the community is doing today.



Description: This step seeks to answer two main questions: *Who are we?* and *How are we doing?*

To answer *Who are we?*, the process engages elders from the community that are able to explain the founding of the community, key moments in the community's history and any other happenings that influenced the long-term development of the community.

To answer *How are we doing?*, project staff and Community Facilitators gather any primary and secondary information available regarding demographics, livelihoods, health and nutrition, education, etc. as well as maps, photos or other resources, at the municipal and community level. This contextual information is consolidated and presented to focus groups in a manner that can be easily understood by the community. The focus groups then reflect on this information and add inputs and context. From there, the focus groups provide inputs to develop a holistic descriptive profile of the community, looking at areas such as social cohesion, natural resources and the environment, economic development and household and community services and infrastructure.

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Products	Estimated time for key activities	Total time required* of one Planning Field Officer for each community
Documented history of the community , including how the community was founded, a timeline with key moments in the history, etc.	Semi-structured interviews with selected elders and mixed focus group discussion: 3 total hours Summary write-up: 1 hour	4-5 days *Includes preparation work, travel time, time in the community and systematizing results. See the Operational and Budgeting Guidance section for more detail on time estimates.
Consolidated contextual information from primary and secondary sources (demographics, livelihoods, health and nutrition, education, maps, photos, etc.)	Desk review and visits to local organizations to obtain secondary information: 1-2 days per community	
Descriptive profile of the community , exploring 1) social cohesion, 2) natural resources and the environment, 3) economic development and 4) household and community services and infrastructure	Focus group discussions (ensuring appropriate spaces for women and youth to participate): 3 total hours Summary write-up: 2 hours	



CLD lessons learned: The CLD Project invested more time and resources in this step than any other, primarily because a robust household survey was utilized to collect data from a representative sample (this decision was taken primarily because a project baseline study was not available, and the last national census had occurred more than 15 years prior). In the future, the CLD team recommends using available project baseline and secondary information, rather than gathering primary information through household surveys.

It is also important to note that one of the elements of the planning process most highly valued by the communities is the telling of the community's history. In many cases, this history was not documented or widely known and young people in particular appreciated learning about their history from their elders.



Recommendations and tips:

- If a design or implementation team seeks to incorporate community-based development planning into a project design with a particular sectoral focus, it would be important to layer the sectoral focus onto all three of the products described in this step. For example, if there is particular interest in understanding the challenges the community faces with regards to climate change, the analysis areas and methodological guide for each product would need to be adjusted accordingly. Subsequent steps in this process build off of the areas defined in this step.
- Extending personalized invitations to specific community members to participate in focus group sessions was a great way to ensure the inclusion of specific community members that offer valuable perspective on specific topics.
- Prior to initiating this step, finalize the format and any guidance for preparing the plan document. This will help project staff clearly understand the documentation needed of each product. See Step 5 for details.



Links to CLD and other guidance and examples:



[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Manual Comunitario, Segunda parte: Planificando el desarrollo comunitario, pp. 17-25, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)



[Planes de Desarrollo Comunitario: Un plan del presente para construir el futuro, Sección 3.2.2 Diagnostico comunitario, pp. 15-18, Proyecto Comunidades Liderando su Desarrollo, 2021.](#)



[Guide to Facilitating Community-Led Disaster Risk Management \(CLDRM\), Process 4: Understand our Past, Present and Future, CRS, 2017.](#)

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Proyecto Comunidades Liderando Su Desarrollo

REFERENCIAL
Delimitación Nubeaz



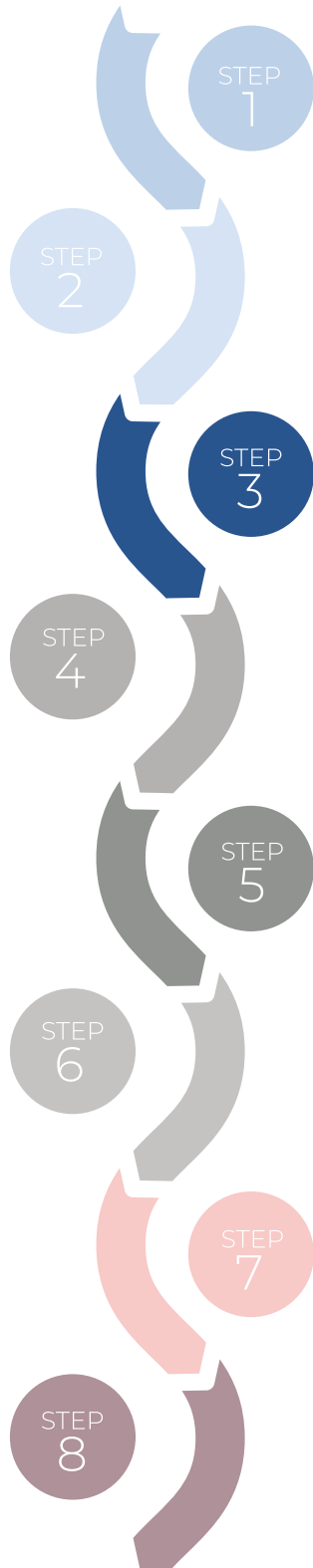
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USAID
ORGANIZACIÓN DE AMÉRICAS LATINAS Y DEL CARIBE
OEA

Organización Comunitaria
Tetzac, Cunén, Quiché, 2019

STAGE 1: ASSESS

STEP 3: PRIORITIZE AND UNDERSTAND OUR CHALLENGES AND OPPORTUNITIES



Objective: Prioritize and build a shared understanding of challenges and opportunities that are most important for the entire community.



Description: In this step, the community begins to answer the question: *Where do we want to go?* This involves carrying out focus groups to do a participatory analysis of the strengths, weaknesses, opportunities and threats (SWOT) of each area defined under Step 2. With CLD, this meant organizing one focus group to inform the analysis of economic development and natural resources and the environment, and one focus group to inform the analysis of social cohesion and community and household services and infrastructure. Community members and special guests (examples: the agricultural extensionist covering the community, or a teacher from the local school) that had good perspective to offer to the analysis were invited to the focus group most relevant to their interests and experience. Concluding these analyses, the focus groups then use defined criteria to do a prioritization exercise to recommend which challenges and opportunities to address as a matter of priority. With CLD, the priorities were then typically validated in a general community assembly.

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Products	Estimated time for key activities	Total time required* of one Planning Field Officer for each community
Strengths, weaknesses, opportunities and threats (SWOT) analysis of each area used in Step 2 and preliminary prioritization of challenges and opportunities	Focus group discussions: 1 mixed session of 1 hour each focused on each area, complemented by 1 session of women-only and youth-only groups of 1 hour each (6 total hours)	3-4 days *Includes preparation work, travel time, time in the community and systematizing results. See the Operational and Budgeting Guidance section for more detail on time estimates.
	Summary write-up: 3 hours	
List of agreed priorities for community development	General community assembly: 2 hours	
	Summary write-up: 1 hour	



CLD lessons learned: The communities supported by CLD were able to identify many important challenges and opportunities, and prioritizing the *most important* is not easy. The Community Development Plans developed under CLD are large documents, in part because the communities included on average 15 strategic actions responding to their priorities. If the project had urged the communities to carry out a stronger prioritization process, the plans themselves could have been more strategic and the project could have subsequently been better equipped to understand how to prioritize project investments and efforts to respond to community priorities.

Going through the exercise of analyzing various aspects of community life and well-being (the four areas described under Step 2) push the participants to think holistically, giving space to analyze important issues that otherwise may not be included in conversations relevant to the long-term development of the community. Likewise, analyzing strengths, weaknesses, opportunities and threats (and not just problems) allows for putting all factors on the table prior to making important decisions about priorities. Strong facilitation of the focus groups is key to motivate participation and support the groups to come to consensus on priorities. Particularly important is getting to the clear articulation of the challenge or opportunity, including the nature of it, who is most affected by it (or could benefit from it), where and when it is most severe (or relevant), etc.



Recommendations and tips:

- When formulating the challenges and opportunities, the more specific the challenge/opportunity is, the easier the action planning will be in the following step.
- Encourage the community to prioritize no more than two or three challenges or opportunities per area. Following this initial prioritization, the participants could review the priorities from each area and do a secondary overall prioritization, to reach a more manageable number. Be aware that limiting too much could result in focusing on the priorities of the official leaders; allowing a few more permits room for the priorities of other groups. Consider incorporating an anonymous voting exercise (see the ‘pocket chart voting’ technique within the resources below) to determine top priorities and mitigate participants from being influenced by leaders or other influential members of the community). The priorities become the basis for action planning, as such, the remaining process and the subsequent plan document will grow in effort and size with each additional priority on the list.



Links to CLD and other guidance and examples:



[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Manual Comunitario, Segunda parte: Planificando el desarrollo comunitario, p. 28, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)



[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Herramientas y Guías, Formato de priorización de problemas y necesidades, p. 39, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)



[Guide to Facilitating Community-Led Disaster Risk Management \(CLDRM\), Process 6: Prioritize Community Challenges & Resource R: Pocket Chart Voting, CRS, 2017.](#)

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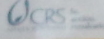
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INSTITUCIONAL DE ORGANIZACIÓN COMUNITARIA

Con el apoyo de:  

MERCY CORPS ADIPO XETZAC

Con el apoyo de:  

Fortalecer las capacidades del
Órgano de Coordinación del
COCODE sobre la naturaleza,
principios y sus funciones.

Con el apoyo de:  

4 OBJETIVO
Asesorar a líderes
sobre la importancia de
las reuniones de
comunidad para el desarrollo
inclusivo.



MERCY CORPS ADIPO ORGANIZACIÓN

Con el apoyo de:  



STAGE 2: PLAN

STEP 4: DEVELOP AN ACTION PLAN



Objective: Prepare a community-owned development vision and action plan to respond to defined priorities.



Description: The community carries out an exercise to collectively envision the change that it wants to achieve and describes the community's development vision for the plan period. The period for CLD's Community Development Plans is ten years. The community also develops and agrees on an action plan that will serve community leaders to guide their actions year by year, even when leadership changes during the plan period. In Guatemala, the format used for the action plan is not prescribed by SEGEPLAN (given that it is not an investment plan), but rather is a tool that should be oriented to the community level.

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Products	Estimated time for key activities	Total time required* of one Planning Field Officer for each community
The community's development vision	Focus group discussions (ensuring appropriate spaces for women and youth to participate): 2 total hours Summary write-up: 30 minutes	3-4 days *Includes preparation work, travel time, time in the community and systematizing results. See the Operational and Budgeting Guidance section for more detail on time estimates.
Action plan , including preliminary thinking on how to use the plan to mobilize external resources	Focus group discussions (ensuring appropriate spaces for women and youth to participate): 5 total hours Summary write-up: 2 hours	



CLD lessons learned: The format and terms CLD used for action planning were found to be overly academic for the primary audiences (communities and other local actors). For example, terms such as *strategic actions, viability and sustainability* tended to be confused or interpreted in different ways. As such, the CLD team learned that a simple format with easy-to-understand terms is key for this step. Again, strong facilitation of this step is critical for the development of a concrete, practical plan.





Recommendations and tips:

- CLD recommends simplifying the action plan format to include the following fields for each priority: 1) solution (one or more per priority) 2) activities (one or more per solution) 3) result(s) (per activity) 4) leader (per activity) 5) timeline by year (per activity) 6) external actors that can support (by solution). This recommended format would result in a solid big picture plan for the plan period, with the idea being that community leaders may want or need to develop a more detailed implementation plan for each year (or the timeframe they choose).



Links to CLD and other guidance and examples:



[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Manual Comunitario, Segunda parte: Planificando el desarrollo comunitario, pp. 25-30, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)



[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Herramientas y Guías, Herramienta No. 6 Criterios de Priorización de Proyectos Comunitarios, pp. 35-41, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)

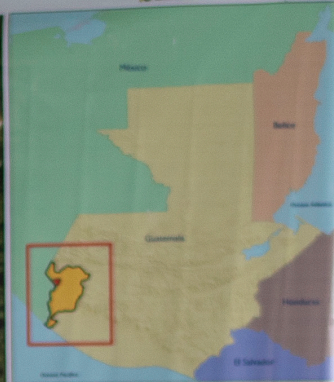


[Example Community Development Plan](#)



[Guide to Facilitating Community-Led Disaster Risk Management \(CLDRM\), Process 8: Agree on Solutions & Process 9: Develop a Community-Led Disaster Risk Management Action Plan, CRS, 2017.](#)

COMUNIDADES LIDERANDO SU DESARROLLO



Leyenda

TIPO DE VIVIENDA

- Casa No Habitada
- Casa Habitada

INFRAESTRUCTURA COMUNITARIA

- Alcaldía Comunitaria
- Escuela Oficial Rural Mixta
- Iglesia Católica

SECTORES DE LA COMUNIDAD

- Sector 1
- Sector Cantón Centro
- Sector 2

Fecha de elaboración: Mayo de 2018
Proyecto de desarrollo digital 1-18-000
Municipio: San Marcos
MESA de Apoyo Comunitario: 1-18-000
Elaborado por: Autorías Comunitarias, Caritas

Nombre del mapa: MGS-18-04
Escala: 1:25,000
UTM Zona 18N

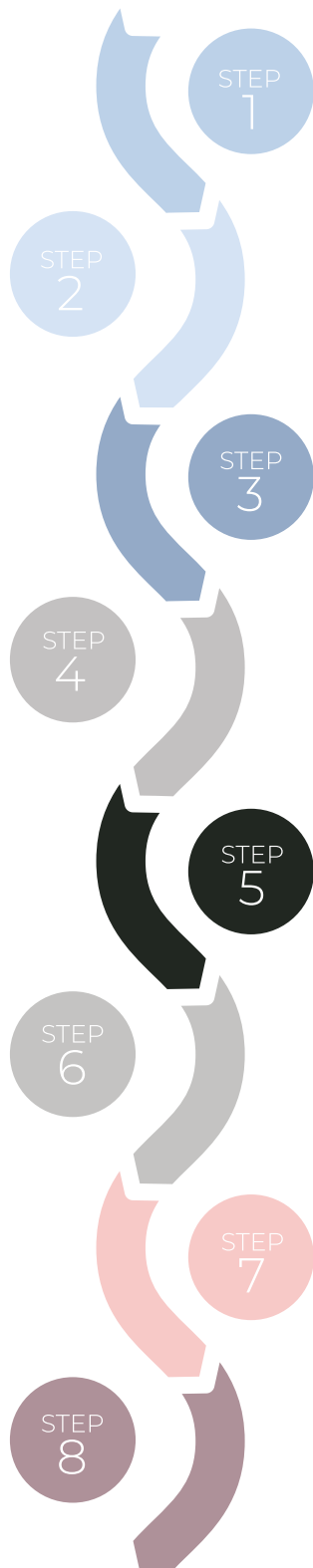
No. mapa: 1 de 1

Escala de mapas: 1-6,183
Adaptado por: Asesores Técnicos y MESA Pastoral Social Caritas, San Marcos
Revisado por: Liderazgo y Autorías Comunitarias
Fecha: 05/08/2018



STAGE 2: PLAN

STEP 5: PULL IT ALL TOGETHER IN A PLAN



Objective: Prepare a digital plan document for each community, capturing the results of Steps 2 through 4 of the community-based development planning process.



Description: Project staff would typically lead the preparation of the digital plan document, by summarizing the results of the history of the community, the consolidated primary and secondary information, the descriptive profile of the community, the SWOT analysis by area, the list of agreed priorities for community development, the community's development vision and, finally, the action plan. As mentioned previously, it is recommended to carefully prepare and validate the format of the plan document early in the community-based development planning process, so that alignment between the process and the resulting plan document is strong.

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Products	Estimated time for key activities	Total time required* of one Planning Field Officer for each community
Digital plan document , using a carefully developed and validated format	Document preparation: 3 days per document (or less if the Planning Field Officer has systematically prepared inputs for the plan during Steps 2 through 4)	3 days *Includes preparation work, travel time, time in the community and systematizing results. See the Operational and Budgeting Guidance section for more detail on time estimates.



CLD lessons learned: CLD utilized a more elaborate methodology for community-based development planning that resulted in plans with considerable amounts of information and large action plans. As described to this point, CLD recommends streamlining the methodology that should also result in streamlined plan documents, capturing only essential information and summaries of the products recommended thus far. Additionally, the CLD final evaluation found that many community members did not understand their Community Development Plan, given their educational level as compared to the presentation and volume of the plan's content. As such, the plan document should be as simple as possible and use language that is easily understood by the community.

With CLD, project staff that brought strong facilitation skills and experience in community development processes were not always the strongest writers. Additionally, given the scope of the CLD initiative (more than 200 plans), it was also necessary to invest in guidance and support to ensure meeting quality standards. As such, CLD hired a trusted consultant to provide basic training to project staff on quality standards and additional writing tips and subsequently to carry out a final quality control check of each of the plan documents.

CLD supported participating communities with the production, design and printing of their Community Development Plans. While the participating communities generally have low literacy levels, the CLD experience has shown that the professional presentation of the plans was strategic for resource mobilization efforts, lending credibility to community leaders' subsequent advocacy efforts.

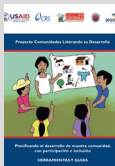


Recommendations and tips:

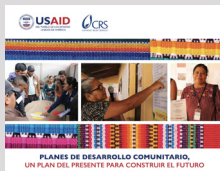
- A careful review of the plan format is recommended to ensure that it has a logical flow, avoids repetition and covers the minimum recommended content. Additional guidance could cover standards for writing, such as the use of first- or third-person voice and language that is easily understood by the community.
- The plan document should be a succinct summary of the results of the process carried out in the community. It can be helpful to write up sections at a time, soon after obtaining inputs from the community. Insertion of high-quality photographs (example: a timeline of the community's history) and other graphics is recommended to make the document less text heavy and more visually friendly. Limit the plan document to no more than 20-25 pages.
- Everyone involved in the preparation and review of the plan documents should have experience with adult learning principles and the preparation of communication materials for the intended audience.
- If feasible, invest in an attractive graphic design for the plan format and printing of the plan booklets. CLD printed three copies of each Community Development Plan booklet: one for the community to keep, one to present to the municipal government and one for project records.



Links to CLD and other guidance and examples:



[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Herramientas y Guías, Herramienta No. 4 Plan de Desarrollo Comunitario, pp. 25-28, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)



[Planes de Desarrollo Comunitario: Un plan del presente para construir el futuro, Sección 4 Resumen de las Prioridades Comunitarias Según los Planes de Desarrollo Comunitario por Sector, pp. 25-29, Proyecto Comunidades Liderando su Desarrollo, 2021.](#)



[Example Community Development Plan](#)

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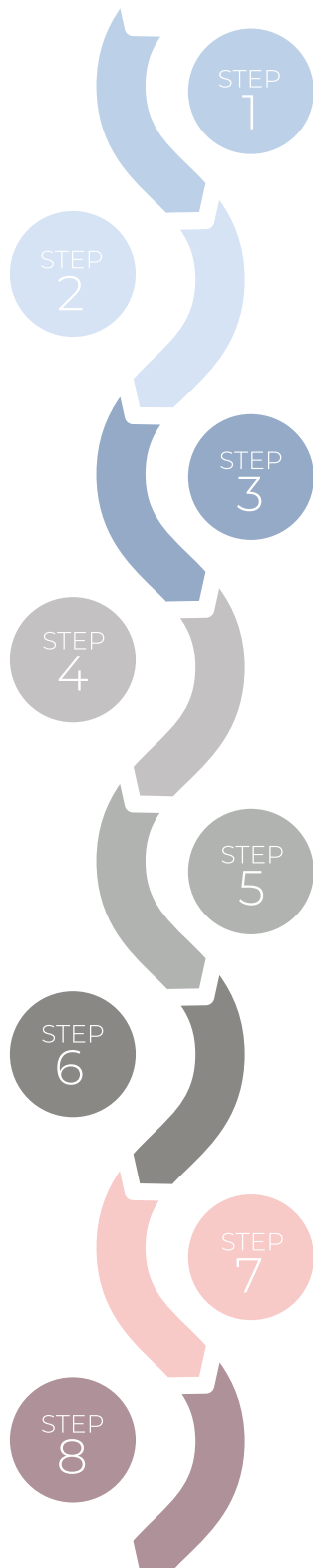
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STAGE 2: PLAN

STEP 6: SHARE THE PLAN WIDELY



Objective: At the community level, widely share the key content of the plan and seek the community's official approval.



Description: Depending on the local context, the official approval of the plan may take place with the core planning group, the core planning group and other community leaders or in a general community assembly. If the official approval rests with a relatively small group, sharing the key content of the plan with the larger community via some other mechanism is still very important. This is a key moment in the process for community leaders to model transparency and accountability.

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Products	Estimated time for key activities	Total time required* of one Planning Field Officer for each community
Official community approval of the plan ; the community at large is informed of the key content of the plan	Meeting with community leaders and/or general community assembly: 2-3 hours	1-2 days *Includes preparation work, travel time, time in the community and systematizing results. See the Operational and Budgeting Guidance section for more detail on time estimates.



CLD lessons learned: One element of the CLD community-based development planning process that worked very well was the garnering of community buy-in at each step (in other words, systematically sharing and validating the results of each step at the community level). In this manner, the final official approval of the Community Development Plan in this step tended to be something of a celebration of reaching such an important milestone.



Recommendations and tips:

- In addition to carrying out meetings to share the key content of the plan, CLD recommends setting up an information board to display in a public location to highlight key content of the plan and share updates over time. There should be special attention to ensuring marginalized and vulnerable groups know about the key content of the plan and how to get involved in the implementation of the action plan.



Links to CLD and other guidance and examples:

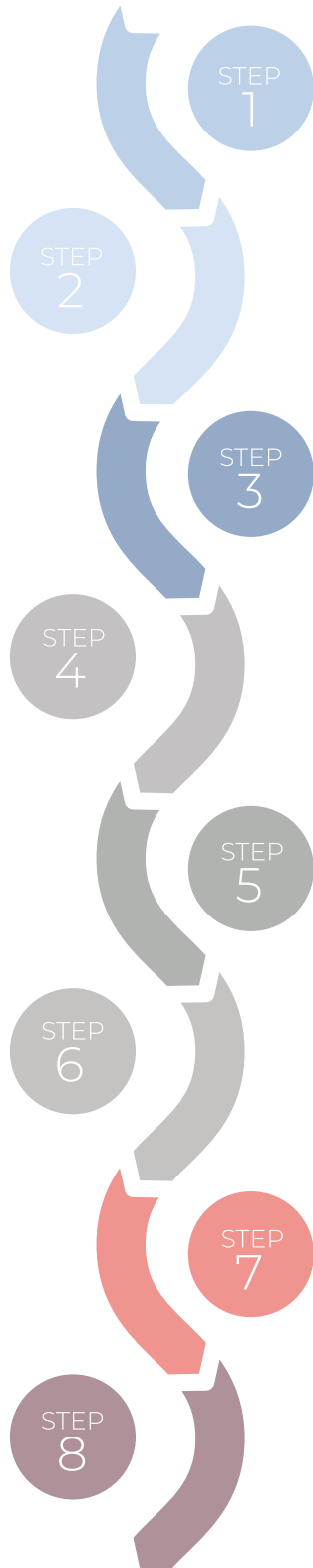


[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Manual Comunitario, Segunda parte: Planificando el desarrollo comunitario, pp. 31-32, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)



STAGE 3: IMPLEMENT

STEP 7: USE THE PLAN TO MOBILIZE RESOURCES FOR PRIORITY PROJECTS



Objective: Position the community among key external actors in order to mobilize resources for the implementation of the community's plan.



Description: Project staff provide technical assistance and accompaniment to community leaders to support the preparation of a basic project profile and advocacy plan for one or more prioritized projects. This preparation then sets the stage for meetings with key external actors to share their development plan and make a pitch for contributing resources for one or more of their prioritized projects. While external actors from municipal or higher levels of government may be targeted in this step, private sector actors may also very well come into play. This step is the start of project cycles that may last for months or years.

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Products	Estimated time for key activities	Total time required of one Planning Field Officer for each community
Basic project profiles for priority projects	Focus group meeting and document preparation: 3-4 hours per project profile	Variable Note: Support from sectoral technical staff also required for project design
Basic advocacy plan for priority projects	Meeting with community leaders: 1 hour for each priority project	Variable
Strategic dissemination of the community's development plan among key external actors; delivery of a simple pitch to each external actor	Meetings with key external actors: variable time (these meetings may take place over the course of many months as opportunities arise)	Variable



CLD lessons learned: The community-based development planning methodology must encompass community-led resource mobilization. Otherwise, you may easily run the risk of a disconnect between community-identified priorities and the practical planning of how to mobilize external

resources to respond to them. Clear and transparent messaging about roles and responsibilities and what each party (including the project) is willing and able to contribute to the process is critical from the very start of this process. The project supporting community-based development planning may offer resources for co-investment in prioritized projects, and CLD recommends using these resources (at least in part) for strategic pre-investments that have the potential to catalyze subsequent co-investment for project implementation (example: using project resources to pay for the technical study and design of a water project to subsequently leverage public and private funding for the implementation of the water project). Monetizing and presenting the value of the pre-investment in a project can be an effective means to attract co-investment for the implementation.

CLD has also learned that it is best to not let much time pass between the end of the core planning period (Step 6) and the implementation of a project that responds to a community priority. Relatively quick action in this regard helps the wider community to draw the link between the community-based development planning process and concrete responses to identified priorities.

After the Community Development Plans were finalized, the CLD team selected 50 communities to support intensively with community-led resource mobilization (the essence of this step). In each community, basic project profiles were developed for three projects and an advocacy plan was developed to mobilize resources for the three. Project staff accompanied the community leaders while they had their first meetings with external actors, keenly focused on bolstering their confidence and delivery of key messages. The project profiles and advocacy planning, paired with close accompaniment from project field staff, resulted in 98 projects with secured public funding, valued at more than \$11.8 million.



Recommendations and tips:

- The Planning Field Officer can continue to be the lead for the three products described in this step. Depending on the sectoral focus of the basic project profiles, it may be necessary for other technical staff to support the design process (and subsequent project implementation).
- Prior to meetings between community leaders and municipal actors to present their plans and pitches for financing specific projects, the CLD team made efforts to share with these same actors the value of the community-based development planning process and the incredible opportunity to align municipal resource allocation with community priorities. In this way, municipal actors were primed to receive community leaders and consider an effective response to their pitch. Along the same lines, a project could organize a webinar or event on community-based development planning, to use as a forum for dynamic community leaders to share their experiences with the planning process and set the stage for key actors to co-invest with the communities.
- A basic advocacy plan should focus on mapping organizations operating at the municipal or departmental level and their respective programs or initiatives, to identify possible opportunities. Project staff can contribute to this process by tapping into their networks and researching additional opportunities.



Links to CLD and other guidance and examples:



[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Manual Comunitario, Tercera parte: Implementando nuestro plan de desarrollo, pp. 33-39, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)



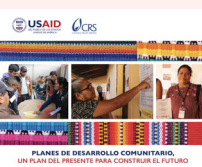
[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Herramientas y Guías, Herramienta No. 7 Planificación de Proyectos Comunitarios pp. 42-47 & Herramienta No. 8 Perfil de Proyectos pp. 48-55, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)



[Example Community Advocacy Plan](#)



[Nuestra Experiencia en los Planes de Desarrollo Comunitario, Sección II: Nuestros resultados en la comunidad y gestión municipal, pp. 20-31, Proyecto Comunidades Liderando su Desarrollo, 2023.](#)



[Planes de Desarrollo Comunitario: Un plan del presente para construir el futuro, Sección 5 Casos Ilustrativos de Inversión Gestionada Según Prioridades en los Planes de Desarrollo Comunitario, pp. 31-33, Proyecto Comunidades Liderando su Desarrollo, 2021.](#)

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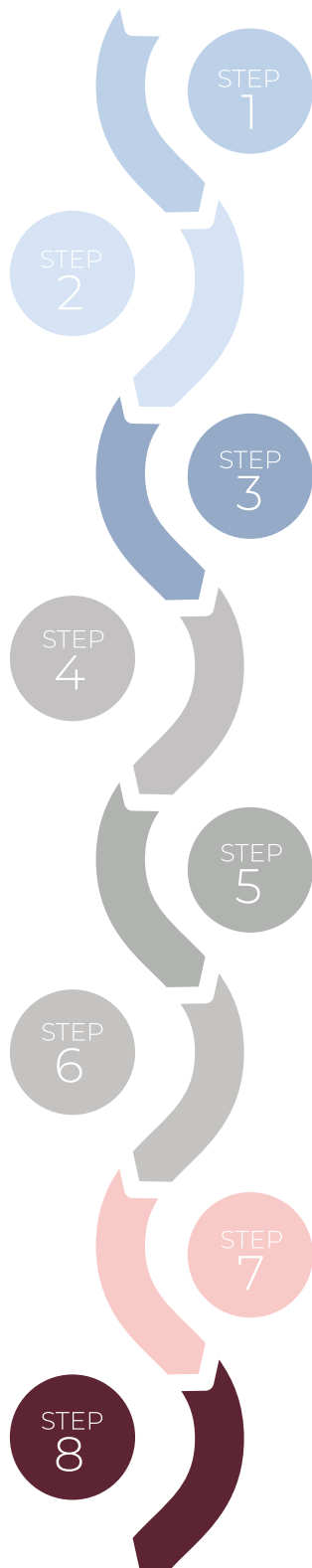
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STAGE 3: IMPLEMENT

STEP 8: MONITOR PROGRESS, LEARN AND ADAPT



Objective: Community leaders regularly monitor progress with the implementation of the community's action plan, carry out accountability actions to keep stakeholders engaged and informed and eventually update their community's plan document taking into account any needed adaptations.



Description: Community leaders have the responsibility of ensuring that their action plan is front and center in their ongoing leadership agenda. Community leaders regularly (at least once per month) discuss progress, identify and address obstacles, learn from mistakes and define any needed follow-on action. Community leaders regularly (at least once per semester) carry out accountability actions to keep the wider community and any external stakeholders engaged and informed. At the close of the original plan period (or earlier, if desired), community leaders update the plan document, revisiting Steps 2 to 6 of this community-based development planning process.

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Products	Estimated time for key activities	Total time required of one Planning Field Officer for each community
Periodic monitoring of the implementation of the community's action plan	Variable	Variable
Accountability actions with the wider community and any external stakeholders	Variable	
Update of the plan document at the end of the original plan period	See estimated time for key activities for each step, although updating the original plan may take considerably less time for some steps	



CLD lessons learned: It has been a challenge for the communities to keep their Community Development Plans firmly established within the COCODES' agendas, given turnover of community leadership and numerous other factors that can divert attention over time. However, as much as a community can institutionalize the orientation to and use of the Community Development Plan for leadership planning and decision-making, the more value the community eventually gleans from the process.

Community leaders' accountability to the wider community and to external stakeholders is critical; this accountability fuels demand from the community to make the development vision a reality while allowing positive recognition of the efforts of everyone who works to put the plan in action. The CLD final evaluation found that in some communities, community members were not able to draw the link between the implementation of the community's action plan and the implementation of individual community development projects that responded to priorities in the Community Development Plan. In other words, in some communities, the understanding of big-picture progress towards the development vision was limited to the small circle of community leaders. This indicates the need for special attention to community-level accountability mechanisms and clear and consistent communication from community leaders.



Recommendations and tips:

- Project staff should provide support to community leaders to foment the institutionalization of the plan in the community's leadership agenda by helping them come to agreements on action plan monitoring and accountability actions. Providing basic tools and ideas to community leaders for these processes can be very helpful to make the next steps more concrete. Likewise, project staff can support community leaders thinking through when and how the plan will be updated after the close of the project.
- When there is a change in community leadership, project staff should provide support for the transfer of the plan to the new leadership. This can greatly contribute to the buy-in of the new leadership.
- CLD also recommends setting up an information board to display in a public location to highlight key content of the plan and share updates over time. For example, the project could support the communities with the printing of a vinyl poster listing the activities, results, leaders and timelines for the activities relevant for the first few years of the plan period; this vinyl poster could also be used during accountability actions, focusing updates on progress on these activities, including resource mobilization efforts. This type of tool is critical to help the community to draw the line between the implementation of projects and implementation of the plan.



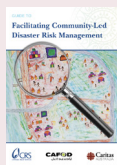
Links to CLD and other guidance and examples:



[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Manual Comunitario, Tercera parte: Implementando nuestro plan de desarrollo, pp. 39-54, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)



[Planificando el desarrollo de nuestra comunidad, con participación e inclusión: Herramientas y Guías, Herramienta No. 9 Seguimiento y Monitoreo de Proyectos pp. 56-62 & Herramienta No. 12 Rendición de Cuentas pp. 76-80, Proyecto Comunidades Liderando su Desarrollo, 2018.](#)



[Guide to Facilitating Community-Led Disaster Risk Management \(CLDRM\), Process 10: Track Progress to Learn, CRS, 2017.](#)



Operational and Budgeting Guidance

To facilitate the incorporation of community-based development planning into project budgets, an illustrative budget is provided below, based on a scenario of simultaneously supporting 20 communities during a four-month period to carry out Steps 1 through 6 (the core planning period) of the process. The illustrative budget assumes that the community-based development planning process fits into a larger project, with the commensurate staffing structure and resources for field operations. Project design teams can use this illustrative budget to play with different scenarios, including organizing two or more cohorts of communities and supporting them in a sequential manner, with the opportunity to capture learning and adapt the methodology as the project team gains experience. This guidance has been developed in alignment with the Program Quality Standard for Resource Management, ensuring cost-effective investment of financial, material and human resources.

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Illustrative budget: Supporting 20 communities over 4 months with the core planning period (Steps 1-6)

All costs in US\$	Number	Rate (QTZ)	Rate (USD)	Unit of Measure	%	Frequency	TOTAL	Budget Notes
Personnel								
Community-based Development Planning Technical Advisor (CRS Budget)	1	Q 18,000	\$ 2,400	Month/FTE	20%	6	\$ 2,880	CRS Technical Advisor to support with project design processes, contextualization of the methodology, training of field staff, field accompaniment during roll-out of the methodology, advising for learning and adaptation. An additional 2 months of support beyond the 4-month core planning period are built in to cover time needed for preparation and field piloting.
Community-based Development Planning Field Coordinator (Local Partner Budget)	1	Q 7,500	\$ 1,000	Month/FTE	100%	6	\$ 6,000	Partner level Field Coordinator position to provide technical and program quality oversight and supervision of the Field Officers for community-based development planning. This position would not be necessary if the scale of the project were small, and a Project Coordinator could assume this role. An additional 2 months of support beyond the 4-month core planning period are built in to cover time needed for preparation and field piloting.
Community-based Development Planning Field Officer (Local Partner Budget)	4	Q 6,600	\$ 880	Month/FTE	100%	5	\$ 17,600	Partner level Field Officer positions to directly support participating communities with the community-based development planning process and train and mentor Community Facilitators. Each Field Officer can simultaneously support 5 communities over a 4-month core planning period. An additional 1 month of support beyond the 4-month core planning period is built in to cover time needed for preparation and field piloting.
Sub Total Personnel							\$ 26,480	
Fringe Benefits								
Fringe Benefits (CRS Budget)	1	Q 21,600	\$ 2,880	Lump	48%	1	\$ 1,382	Fringe benefits, in compliance with organizational policy and local labor law.
Fringe Benefits (Local Partner Budget)	1	Q 177,000	\$ 23,600	Lump	37%	1	\$ 8,732	
Sub Total Fringe Benefits							\$ 10,114	
Travel and Transportation								
Hotel - local travel (Local Partner Budget)	25	Q 188	\$ 25	Nights	100%	5	\$ 3,125	These estimates are provided for illustrative purposes only (for a team of 1 Field Coordinator and 4 Field Officers); budgeting should be based on the geographic context and logistics planning. 5 nights hotel per staff person per month; 10 days per diem per month for the Field Coordinator and 18 days per diem per month for each Field Officer. An additional 1 month of expenses beyond the 4-month core planning period is built in to cover costs needed for preparation and field piloting.
Per diem - local travel (Local Partner Budget)	82	Q 150	\$ 20	Days	100%	5	\$ 8,200	
Motorcycle expenses (Local Partner Budget)	0	Q 1,500	\$ 200	Month	100%	5	\$ -	
Motorcycle registration and insurance (Local Partner Budget)	0	Q 2,250	\$ 300	Year	100%	1	\$ -	The field staff may need transport to the communities (option: motorcycles). These costs or others may likely already be considered as part of the overall project budget, and as such the values are not included in this illustrative budget.
Motorcycle protective kits (Local Partner Budget)	0	Q 1,688	\$ 225	Kit	100%	1	\$ -	
Sub Total Travel and Transportation							\$ 11,325	

All costs in US\$	Number	Rate (QTZ)	Rate (USD)	Unit of Measure	%	Frequency	TOTAL	Budget Notes
Supplies								
Laptops (Local Partner Budget)	0	Q 11,250	\$ 1,500	Unit	100%	1	\$ -	The Field Coordinator and Field Officers will each need a laptop. Additionally, the Field Officers may need transport to the communities (option: motorcycles). These costs or others may likely already be considered as part of the overall project budget, and as such the values are not included in this illustrative budget.
Motorcycles (Local Partner Budget)	0	Q 36,750	\$ 4,900	Unit	100%	1	\$ -	
Sub Total Supplies							\$ -	
Other Direct Costs								
Training of project field staff in community-based development planning (CRS or Local Partner Budget)	7	Q 1,875	\$ 250	Participants	100%	2	\$ 3,500	2 3-day workshops to train the Project Coordinator, Field Coordinator and Field Officers in the community-based development planning methodology and contextualize the methodology to the project's needs. Includes hotel and food for 7 participants.
Training of Community Facilitators (Local Partner Budget)	40	Q 563	\$ 75	Participants	100%	3	\$ 9,000	3 1-day workshops to train Community Facilitators for their role in the community-based development planning methodology. Includes hotel, food and transportation for 40 participants (2 Community Facilitators per community).
Optional: Stipends for Community Facilitators (Local Partner Budget)	40	Q 200	\$ 27	Month	100%	4	\$ 4,267	Optional: Stipend for Community Facilitators as a small incentive for their role in the project. \$27 per month roughly equivalent to two full days of work.
Basic workshop kits (Local Partner Budget)	20	Q 150	\$ 20	Kits	100%	1	\$ 400	Kit of materials for each community to include flipchart paper, markers, colored cards, post-it notes, etc.
Optional: Graphic design and printing of community plans (Local Partner Budget)	20	Q 188	\$ 25	Plan	100%	1	\$ 500	Optional: Graphic design of the plan format and printing of plan booklets.
Optional: Co-investment for prioritized community development projects	20	Q 37,500	\$ 5,000	Lump	100%	1	\$ 100,000	Optional: Strategic co-investment in prioritized community development projects. Amount can be adjusted given available resources. These co-investments would be made after the intensive 4-month core planning period.
Optional: Printing of large vinyl posters	20	Q 188	\$ 25	Poster	100%	1	\$ 500	Optional: Printing of 1 large vinyl poster per community to serve as an accountability tool supporting community-based development planning and implementation.
Cell phone plan (Local Partner Budget)	5	Q 375	\$ 50	Month	100%	4	\$ 1,000	Cell phone plan for 5 field staff to facilitate daily communication.
Sub Total Other Direct Costs							\$ 119,167	
TOTAL							\$167,086	

\$ 3,091	Approximate cost per community (not including optional costs)
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\$ 8,354	Approximate cost per community (including all optional costs)
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Detail of Overall Time Estimates

	Time required* of one Planning Field Officer for each community (<u>with</u> the support of Community Facilitators)	Time required* of one Planning Field Officer for each community (<u>without</u> the support of Community Facilitators)
STAGE 1: ASSESS		
Step 1: Get ready	2 days	3 days
Step 2: Understand our past and present	4 days	5 days
Step 3: Prioritize and understand our challenges and opportunities	3 days	4 days
Time estimate for STAGE 1	9 days	12 days
STAGE 2: PLAN		
Step 4: Develop an action plan	3 days	4 days
Step 5: Pull it all together in a plan	3 days	3 days
Step 6: Share the plan widely	1 day	2 days
Time estimate for STAGE 2	7 days	9 days
Total time estimate for core planning period	16 days	21 days
STAGE 3: IMPLEMENT		
Step 7: Use the plan to mobilize resources for priority projects	*variable time beyond the core planning period	
Step 8: Monitor progress, learn and adapt	*variable time beyond the core planning period	

*Note: Time estimates include preparation work, travel time, time in the community and systematizing results. The core planning period encompasses Steps 1 through 6.

Ratio Projections of Field Staff per Communities

	Over a four-month period (roughly 84 workdays)	Over a five-month period (roughly 105 workdays)	Over a six-month period (roughly 126 workdays)
One Planning Field Officer can cover:			
<u>With</u> the support of Community Facilitators, each Planning Field Officer needs to dedicate an estimated 16 days* to the core planning period in each community	5.3 communities	6.6 communities	7.9 communities
One Planning Field Officer can cover:			
<u>Without</u> the support of Community Facilitators, each Planning Field Officer needs to dedicate an estimated 21 days* to the core planning period in each community	4.0 communities	5.0 communities	6.0 communities

*Note: Time estimates include preparation work, travel time, time in the community and systematizing results. The core planning period encompasses Steps 1 through 6.

Human Resources for Community-Based Development Planning

Community-based Development Planning Field Coordinator

- Primary responsibilities: 1) technical and program quality oversight of community-based development planning, 2) training and supervision of Planning Field Officers, 3) adaptation and/or development of detailed methodological guidance and tools, 4) field piloting of methodological guidance and tools and incorporation of adaptations based on project learning.
- Profile: University degree, experience developing and validating methodological guidance and tools preferably for use in community contexts, technical training and facilitation experience, supervisory experience, orientation to learning and adapting and knowledge of adult learning principles and the local community context.

Community-based Development Planning Field Officer

- Can be hired as a short or long-term staff, or as a consultant.
- Primary responsibilities: 1) training and mentoring of Community Facilitators, 2) project focal point for the community, 3) accompaniment during key moments of the planning process (including facilitation of strategic decision-making and provision of technical assistance), 4) systematization of the planning process and preparation of the digital plan document.
- Profile: University degree, proven facilitation experience (preferably of planning or decision-making processes), close familiarity with the local context (preferably from the local area and/or with local language skills), strong verbal and written communication skills, critical analysis skills and experience at the community level with humanitarian or development initiatives.

Community Facilitators

- Community volunteers, receiving additional training and mentoring on the community-based development planning process and potentially a modest financial incentive.
- Primary responsibilities: 1) coordinate with the Planning Field Officer to convene meetings and organize logistics, 2) prepare materials and co-facilitate activities, 3) document the results of activities (take photographs, notes, etc.), 4) be champions of inclusive participation in the process.
- Profile: Reading and writing skills, enthusiasm and creativity, orientation to community service with time to dedicate to the process, good relationships with different sectors of the community and commitment to the development and well-being of the community. Consider young people for this role, as well as gender balance and other factors that may be relevant to the community.

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