SPEAK

Strategic Planning and Self-Evaluation System

Strategic Planning, Evaluation and Knowledge Networking System

Local Sports Partnership User Guide

Contents

1 Coordinators Guide

1.1 Phase 1 Task List

The Coordinator has the task of implementing SPEAK within the project. In this year, this will involve coordinating the work of the Management Committee and all staff and volunteers for SPEAK and attending two training sessions.

The following table summarises the Coordinator's tasks:

Project Coordinator	**Timeframe**	**Estimated Time Required**
1. Attend first SPEAK Training Course	May 2007	1 day
2. Install SPEAK Software (see section 5 of this manual)	After first training day	1 hour
3. Setup Project Details & Coordinator. (see section 6 of this manual)	After first training day	1 hour
4. Convene first Management Committee Meeting - explain methodology underpinning SPEAK - complete Operational Environment section with Management Committee	After first training day	1 – 2 hours at Mgt Cttee Meeting
5. Complete Coordinator's Resource Audit	Before second training day	2 hours
6. Introduce all staff and volunteers to Resource Audit and support through completion	Before second training day	1 day
7. Attend second SPEAK Training Day	November 2007	1 day
8. Hold meeting of staff and volunteers to complete Outputs section	After Resource Audits completed	2 hours
8. Convene Management Committee meeting and complete this year's Impacts section	After Outputs completed	2 Hours
9. Signoff and email completed SPEAK data for this year for inclusion in the overall database	After Mgt Meeting	1 Hour

The following table summarises the tasks for the Management Committee:

Management Committee		
1. At meeting after Coordinator's first training day, discuss and complete the Operational Environment as at the beginning of this year	After first training day and before second training day	1 - 2 Hours
2. Complete Impacts for this year once all Resource Audits and Outputs section complete	After second training day	1 – 2 Hours

The following table summarises the tasks for Staff and Volunteers. All staff will complete a Resource Audit and it is preferable that all volunteers complete a Resource Audit, as that will give the most complete picture of the key Resources available to the project. Management Committee Members who work with the project apart from their membership of the management committee (for example if they do the accounts or visit regularly to sign cheques etc.) should also complete a Resource Audit for that portion of their work.

Project Staff and Volunteers		
1. Complete Resource Audit for their work for this year	After coordinator's first training day	1-2 Hours per staff member or volunteer
2. Attend meeting to complete Outputs section	On completion of Resource Audits and prior to Coordinator's second training day	2 Hours.

1.2 First Management Committee Meeting

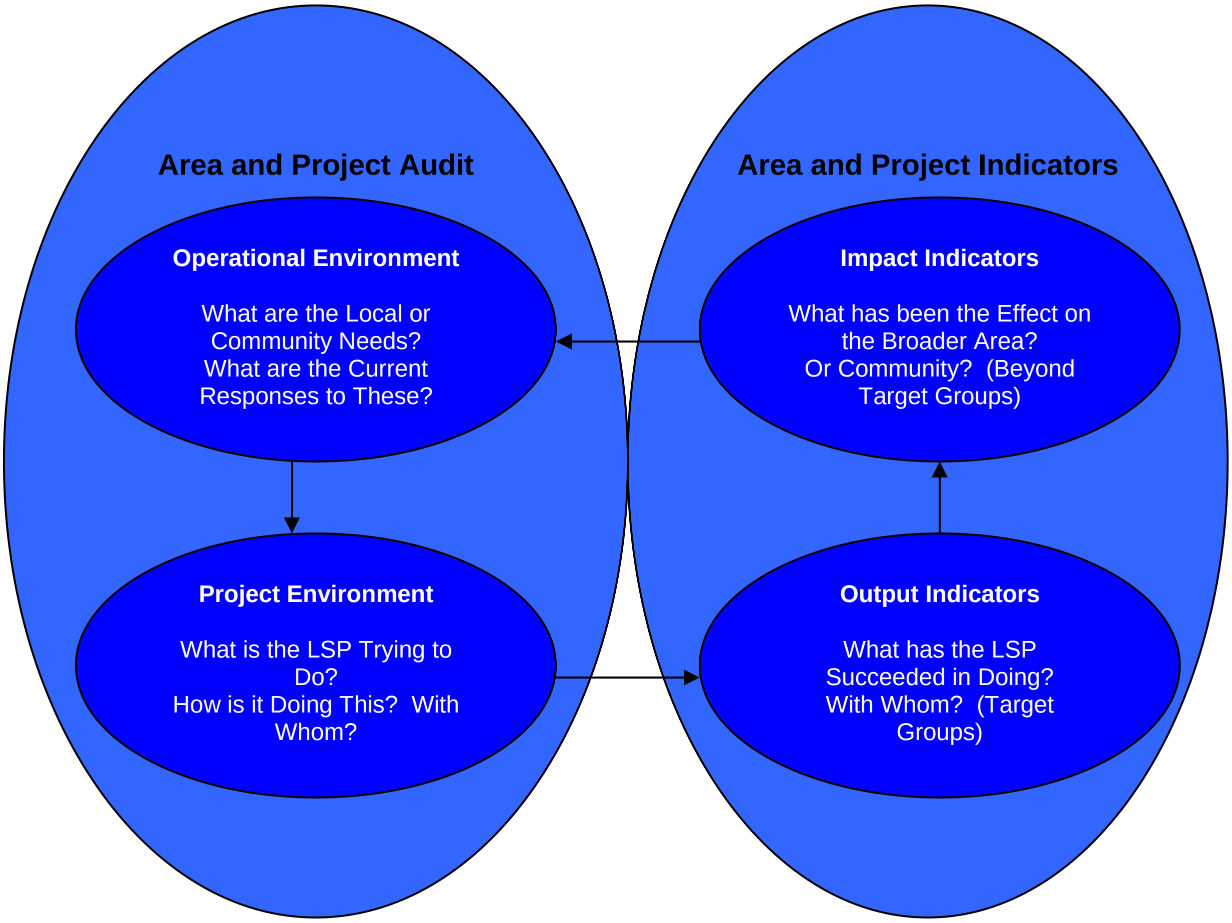
In preparing for the first Management Committee Meeting, there are three key issues to be addressed by the project co-ordinator and explained to the management committee.

The first concerns the **background to the SPEAK project** and its importance for the development of the programme under which your project operates. It is probably useful to talk about the many different uses that this can be put to. SPEAK stands for:

- **S**trategic **P**lanning: producing information to assist staff and management to make informed decisions
- **E**valuation: ongoing internal review; cross project periodic assessments; facility for external inputs.
- **A**nd **K**nowledge: networking based on sharing information between projects, counties, regions and themes

The second concerns **the evaluation methodology,** which informs the onscreen software application. This methodological framework was used very successfully in the evaluation of the Community Development Programme and has a proven track record at project as well as at programme level in Ireland, at EU level and internationally.

The following diagram presents an overview of the approach. It is important that the management committee understand this so as to inform their involvement in the overall evaluation process.



The left hand part of the chart is mainly description: an 'audit' of the project and the environment in which it operates. The right hand side is about review and evaluation: measuring firstly what the project has achieved in relation to its stated objectives and 'target groups', and, secondly, what impact this work has had on the groups concerned.

The top part of the chart is about the environment in which your project operates and hopes to change; the bottom half is about the project itself - what it is and what it delivers. But of most importance is the fact that that chart is circular - it begins with asking what is the external environment we hope to change, goes around full circle, and finishes up with asking questions about how this environment has changed.

Having explained and discussed the evaluation methodology with your management committee, the second key task of this meeting involves conducting a **review of your operational environment as at the beginning of this year.**

The following data needs to be collected and captured during the meeting. (It is useful to gather in advance some of the more factual data, such as Core Community Statistics, Funding etc., and input into SPEAK prior to the meeting, as it may help to inform some of the discussions.)

As explained at the first training session, realistic conclusions can only be made about a project's achievements or outputs if some account is taken of the kind of the development challenges faced. Communities can differ fairly significantly – in terms issues and priorities for development; but also in terms of what (outside of your own project) is being done about these issues.

These first screens that need to be completed at the meeting are really about trying to get some initial feedback on these differences.

Core community statistics relate to some basic indicators which your programme has decided are relevant.

Following this, you are asked to discuss and define the nature and focus of your project in relation to:

1. Firstly, the extent to which particular ‘issues or development themes’ are prominent.
2. Secondly, the ‘working partners’ which are those organisations and agencies (and personnel from them) with whom your project or organisation has established ongoing relationships – and looks at mapping out the nature of those relationships, how well they are going (or not) and why.
3. Thirdly, the ‘target groups’ involved, or with whom the project spends most working time.

Your meeting will also aim to understand a bit more about what other relevant initiatives are being taken, either within your area or with your ‘target group’. A screen asks you to give an idea of the number of other responses in your area.

Another key issue that must be addressed in this section relates to resources you may have access to. You are asked to give some estimate of resources you have been able to access during 2007.

Numbers of staff, volunteers and the background of the management committee are other issues that are covered in the operational environment section of the software.

As you complete these screens at the meeting, there may well be some issues that you may have to return to yourself, figures on catchment area, funding, etc. This is of course non-problematic. However, it is very important that for any of the more qualitative information that needs to be recorded, agreement and consensus is reached by the management committee as a whole.

Remember that the HELP function on each screen will outline in more detail the data that is being requested and the rationale which lies behind collecting that data.

2 SPEAK Data Inputting

All of these sections and screens have Help functions, accessed by clicking on the Help button.

2.1 Operational Environment

This section, the **Operational Environment**, looks at the "environment" within which your project operates. This refers to the community which you work in, the issues that this community faces and also the other responses to those issues that are in place. Information will also be sought on some internal issues to the project, such as staffing, funding and the composition of the Management Committee or Board.

Full on-screen help functions are available for all screens within the Operational Environment section. This help outlines the function of the screen, any examples or tips that may be useful, and any technical or navigational points that may be useful.

2.2 Resource Audit

This section, the Resource Audit, looks at how resources available to the project have been used during the past year. The key resource which any project has is the time available to it from staff and volunteers. It is the distribution of this time that is now being attempted.

Each staff member and volunteer should complete a Resource Audit. Each person can be set up individually within SPEAK by clicking on **‘Admin’** (at the top of the main screen when logged on as a user with admin rights), and by then choosing **‘User Management’** and setting up new users – one user identity for each staff member and each volunteer. See 5.3 below for further details.

As each Staff Member or Volunteer logs on, they will be presented with a menu that has just one option – Resource Audit. (For those users who have been granted admin rights at setup, the menu will display the five options of the Coordinator's menu – Operational Environment, Resource Audit etc.).

Each user's time is then split into three separate categories:

- Time spent on Project Maintenance
- Time spent working with Working Partners
- Time spent working directly with Target Groups.

The time each staff member or volunteer spends after Project Maintenance is then divided across the set of tasks – called Working Methods – into which work done by the projects can be grouped.

A further set of screens explores any time spent on Policy Issues.

Time Spent on Project Maintenance:
This is the time used to keep the project going – whether it be on the maintenance of the physical premises of the project, on staff recruitment and training, on management committee recruitment and support or on internal policy and planning. For some users, all of their time may be spent in this Project Maintenance category.

Time spent working with Working Partners:
The Working Partners are those groups, agencies or statutory bodies who are external to the project, with whom a staff member or volunteer may work. Again some staff or volunteers may spent some, all or none of their time working with external working partners.

Time spent working directly Target Groups
This final split of time looks at how a staff member's or volunteer's time has been distributed across the Target Groups. This is slightly different than above in that an individual person may belong to more than one Target Group (e.g. older, disabled, female). The percentages do not therefore add up to a neat 100% but will overlap significantly. Thus the question is slightly different, in that it asks the following question: "Of the time you have spent working with Target Groups, what percentage of that time was spent working with each Target Group?". As an extreme illustration, if a person has indicated that they spend one day a week working with Target Groups and, of the people that person works with, are all unemployed and half are lone parents, the response in the target group section is 99% (top value) for Unemployed and 50% for Young Men.

Working Methods
The time spent working with external Working Partners or with Target Groups (i.e. time spent after Project Maintenance) is then divided across the range of ways of working within your project.

Policy
Once all the data has been entered, a further set of screens seeks information on any work done by the particular staff member or volunteer which had a policy focus, and the key issues under which this policy work was done.

At the end of the Resource Audit each user can mark the Resource Audit as 'complete'. If the user is not yet finished, the Resource Audit can be left incomplete, and completed later. All data is saved as it is entered.

The reporting process will only include Completed Resource Audits in the details displayed in the report.

2.3 Outputs

This section, the Outputs Section, looks at the quantitative results of the work done by the project in the past year. It is completed collectively by all staff and where possible, volunteers, coming together at one meeting.

These Output screens follow the list of Working Methods, which all staff and volunteers have already used above to distribute their time. These Working Methods include the work done by projects across the common task groups. For each Working Method, the system looks for some headline numbers, and usually the target groups or working partners most associated with each measure. These numbers are only a subset of the possible numbers which could be collected. If you have any further quantitative measures within the project these can be included in the comment boxes on each screen. These comment boxes should be used to describe the work done in any event.

Following the quantitative measures screen, each Working Method has a screen which asks for factors which helped achieve these results and factors which hindered achievement of further results.

2.4 Impacts

By the time that you are inputting to this section, you will have completed the Operational Environment, Resource Audit and Outputs sections.

Each screen in the Impacts section is designed to give you feedback from your Operational Environment, Resource Audit and Outputs sections, where the information is relevant. This information is collated and presented in pie charts, graphs and in simple numerical format. The total time spent by your project staff and volunteers on each working method is aggregated by the system. This is then broken down as a percentage of the overall time committed to the project.

You are encouraged throughout to complement the information on each screen in the Impacts section with other pieces of information collected in the Operational Environment, Resource Audit and Outputs sections. This may involve flicking through the system to remind yourselves of some relevant comments made by a worker or volunteer in the Resource Audit. By extracting the information in such a manner, you are getting maximum value from the system.

There are three important points or three golden rules to bear in mind as you complete the Impacts section.

2.4.1 The Three Golden Rules

Not all impacts are detectable. No system can record all your impacts (many are ‘second-hand’ or ‘third-hand’ – in that you may be able to see the direct impact of your work on groups or people, but not able to trace the knock-on effects this has on other people, families, groups, communities etc.) The aim here is to capture as much of the impact as possible; and to become more confident and competent around tracing and naming impacts as time goes on.

Impacts are long-term. Very often, especially in community development, the real impacts of your work will not be evident for years after the action has been initiated. Because of this, you may be just writing notes in here that allow you to identify ‘progress’ towards impacts – and, when you eventually are able to name real impacts, it might be as a result of work you have done a number of years ago! There may be no impacts to record for this working method this year!!

Be careful to avoid ‘double-counting’. This can occur when one indicator of impact may be claimed under more than one working method heading. For example, one woman going on to pursue an educational course might be attributed to the fact that it ‘began’ by the woman using the project’s resources. The same indicator might than also be ‘claimed’ under providing information – that the woman progressed ‘because we gave her information’. It is important to record the progress – agreeing that it is entered under one ‘working method’ – and then to ensure that the same progress for the same person, people or groups is not also claimed elsewhere.

2.4.2 Tips in Using the Suggested Indicators in the Help Text

The indicators or questions presented in the help text in relation to the nine working methods do not cover all possible indicators. They are here just to prompt thinking. Sometimes the effect of your actions in relation to the working method will be far removed from what the suggested indicators are asking for.

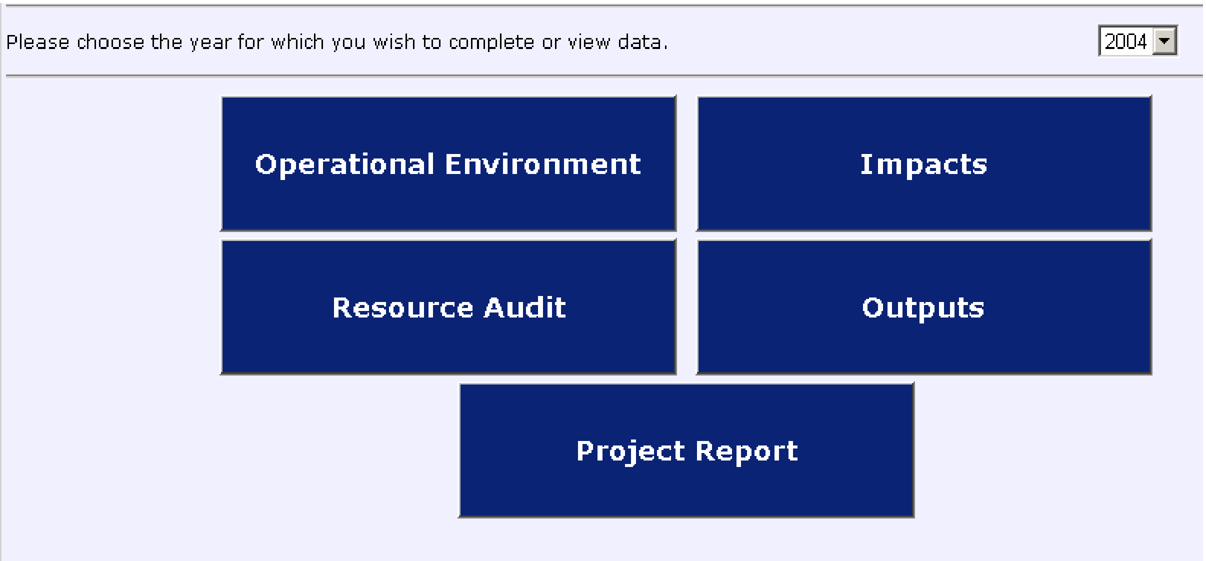
Very often, completely unintended effects become evident, and these can turn out to be the most significant or important. So do not restrict yourself to just the lists in this manual.

It is very important that you provide numbers in the 'box' where at all possible. For example, if only one person has progressed to become involved in community activity as a result of your activities, then it is important to say this. The result is no less important because the number is ONE, especially given the fact that you may have committed very limited resources to this working method; and the fact that what the person goes on to achieve and contribute could be very substantial.

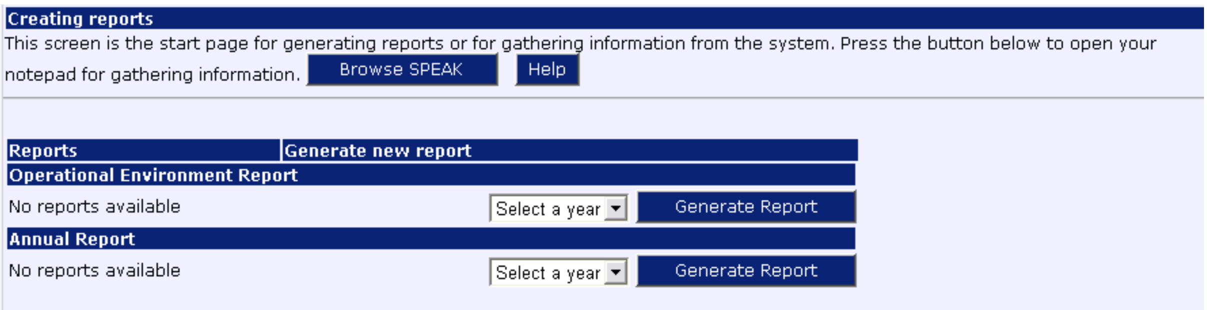
3 SPEAK Reporting and Screen-printing

3.1 Generating an Operational Environment Report

On the main menu screen, click on **'Project Report'**.

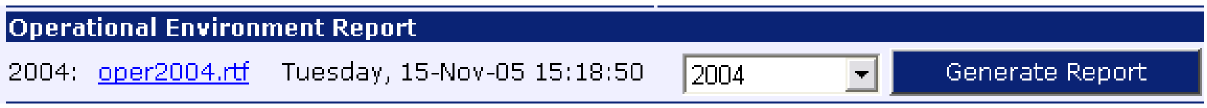


The main SPEAK Reporting Menu is then displayed:



Go to the section titled 'Operational Environment' and select the year you are interested in from the dropdown. Then click on **'Generate Report'**. The report will now appear in the list of Operational

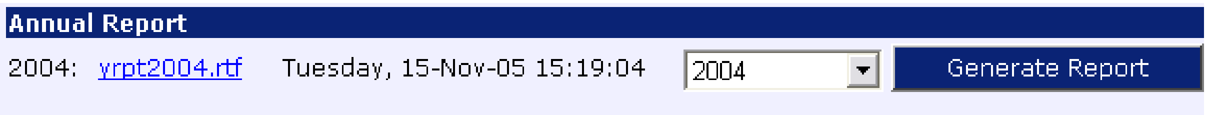
Environment reports which have already been generated and can be accessed at any time by clicking on its link (see below).



The report you have just generated will be marked with the date and the time at which it was created, to make it easier for you to identify it. Clicking on the name of the report will open the document in Internet Explorer, from where you can both browse and print. For further editing and saving, see 3.3 below.

3.2 Generating an Annual Report

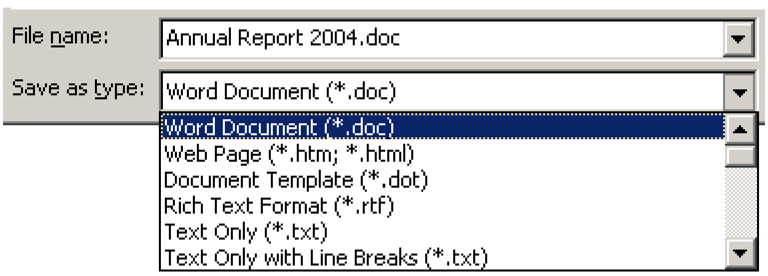
Go to the SPEAK reporting menu, as explained in 3.1 above. Go to the section titled ‘Annual Report’ and select the year you are interested in from the dropdown. Then click on **‘Generate Report’**. The report will now appear in the list of Annual Reports which have already been generated and can be accessed at any time by clicking on its link (see below).



The report you have just generated will be marked with the date and the time at which it was created, to make it easier for you to identify it. Clicking on the name of the report will open the document in Internet Explorer, from where you can both browse and print. For further editing and saving, see 3.3 below.

3.3 Editing and Saving a Report

Reports from SPEAK are created as Rich Text Format documents (*.rtf). These are documents which can be opened by any word processing package. In order to edit and save your report outside of SPEAK, you will need to save it into the word processing package you use. In the case of Microsoft Word, this will involve generating and opening the report in SPEAK as previously explained and then selecting **‘Save As…’** from the **‘File’** menu. You will then need to select ‘Microsoft Word document’ from the dropdown menu and give the report a name (see below). The report and any additional edits will then be saved outside SPEAK.



3.4 Printing/copying Screens

As the SPEAK system sits on the engine of Internet Explorer all functions available within Internet Explorer are also available within SPEAK, even though the menu bars are hidden.

This means that printing screens is relatively straightforward in SPEAK, and is the same as printing from an Internet Explorer screen. Printing screens can be useful for the Management Committee meeting, if access to a PC and/or a Beamer isn’t available.

On any screen you wish to print, press **CTRL and P together**. This will bring up the regular print dialogue box, and allow you to choose the printer etc. SPEAK screens will print best when printed in landscape rather than in portrait format.

Any of the screens within SPEAK can be copied into Word or Powerpoint as necessary, and printed or copied elsewhere from there. To do this, at the screen within SPEAK, press the Print Screen button (usually labelled “Prt Sc”, and on the top right hand side of the keyboard.) This copies the displayed screen to the clipboard. Go to a Word Document, and select paste as you usually would (either CTRL + V or from the menu Edit/Paste). The selected screen will then appear in your Word Document. From here it can be printed in the normal way, printed on overhead acetates or copied into Powerpoint.

4 SPEAK Installation

4.1 *Establishing which Operating System your computer is running*

The computer on which the project will install SPEAK must be a PC (i.e. not an Apple MAC) and must have one of the following Operating Systems: Windows 98 Second Edition; Windows Millennium Edition (ME); Windows 2000 or Windows XP.

The Operating System you are using will appear as a large logo when you power up the computer, or it can be established when you are already powered up, as follows:

- Click START, then SETTINGS, then CONTROL PANEL. The Control Panel screen will then appear.
- Click on SYSTEM within this Control Panel screen. This will display a further screen giving details of the physical and other components of your computer.

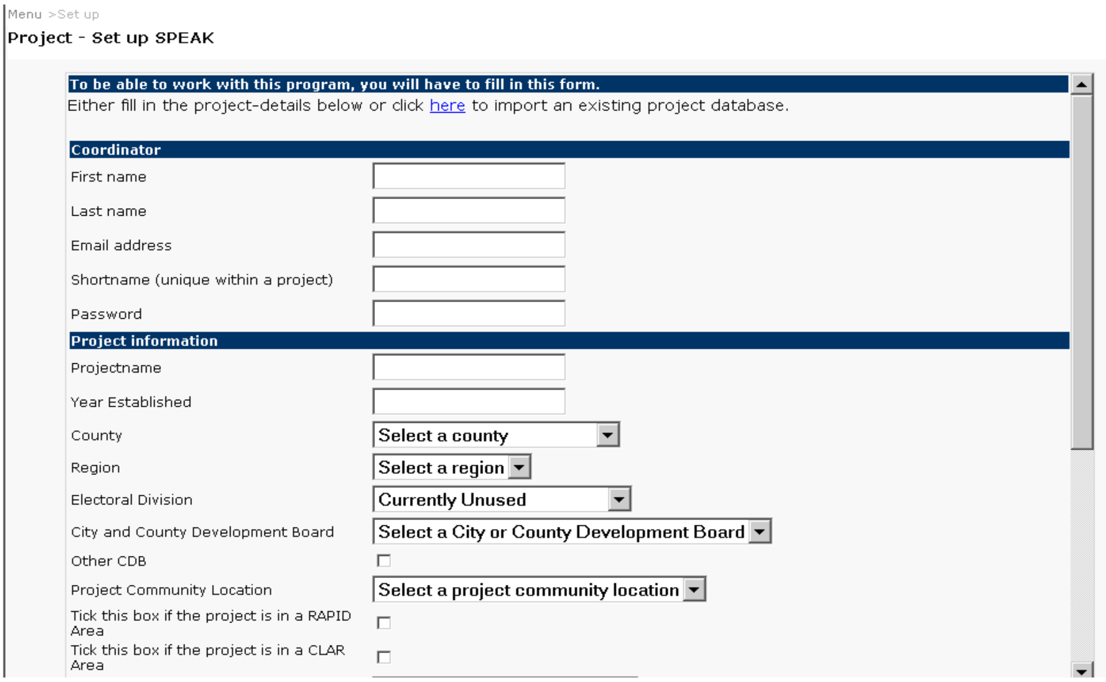
On the screen displayed, you will see under System, the Operating System running on your PC – it will usually say Microsoft Windows xxxx.

4.2 *SPEAK Software Installation*

Choose one computer in you organisation on which SPEAK will be installed. All users will access SPEAK through this computer. Put the SPEAK CD into this computer’s CD drive. If the installation does not start automatically (because you have Autorun disabled, for example), just open My Computer and click on the icon for your CD drive. Then click on the file you find there (which will be called something like Speak-v2.40.exe or something similar). Installation will start and you can just follow the instructions on-screen.

4.3 *Initial Project Set-up*

The first time that the SPEAK icon is selected from the desktop the Project Maintenance Screen, as below, will be displayed. This screen asks for data on the project, such as name and location etc. and must be completed before any further actions can be completed within SPEAK.



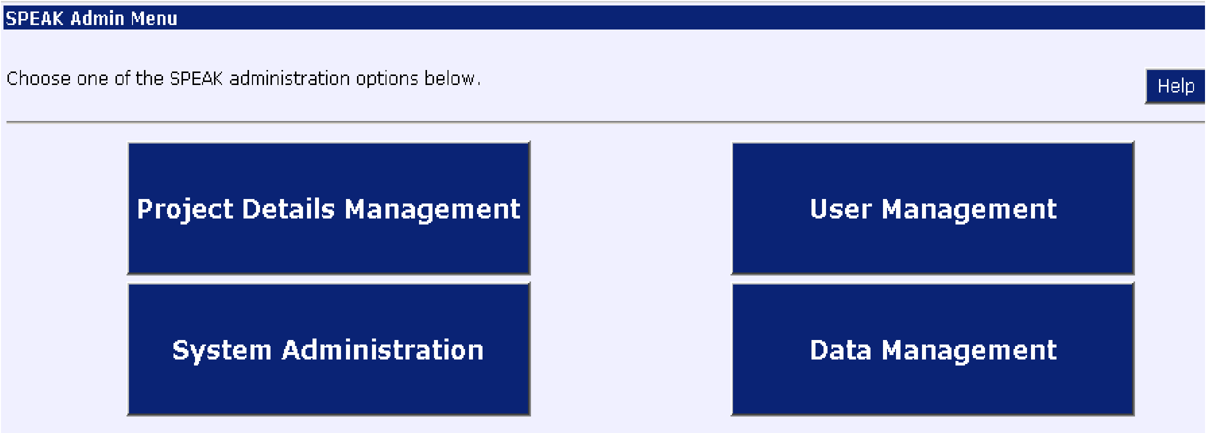
Fill in this Project Setup information and click on **'Save'**. Error messages will display at the top of the screen if there is some required information which has not been completed. When Project Setup is complete, the Main Menu will then be displayed.

5 SPEAK Administration Functions

The SPEAK Administration Functions are available to any SPEAK user who has been set up with SPEAK admin rights.

When a SPEAK user with admin rights logs on to SPEAK, all screens within SPEAK will have a number of options displayed in the top section of the screen, usually **Menu I Admin I Quit** as follows:

Selecting the **Admin** option from this list, displays the menu below, which allows access to the main administration functions within SPEAK.



This section outlines the details of the four main Administration functions:

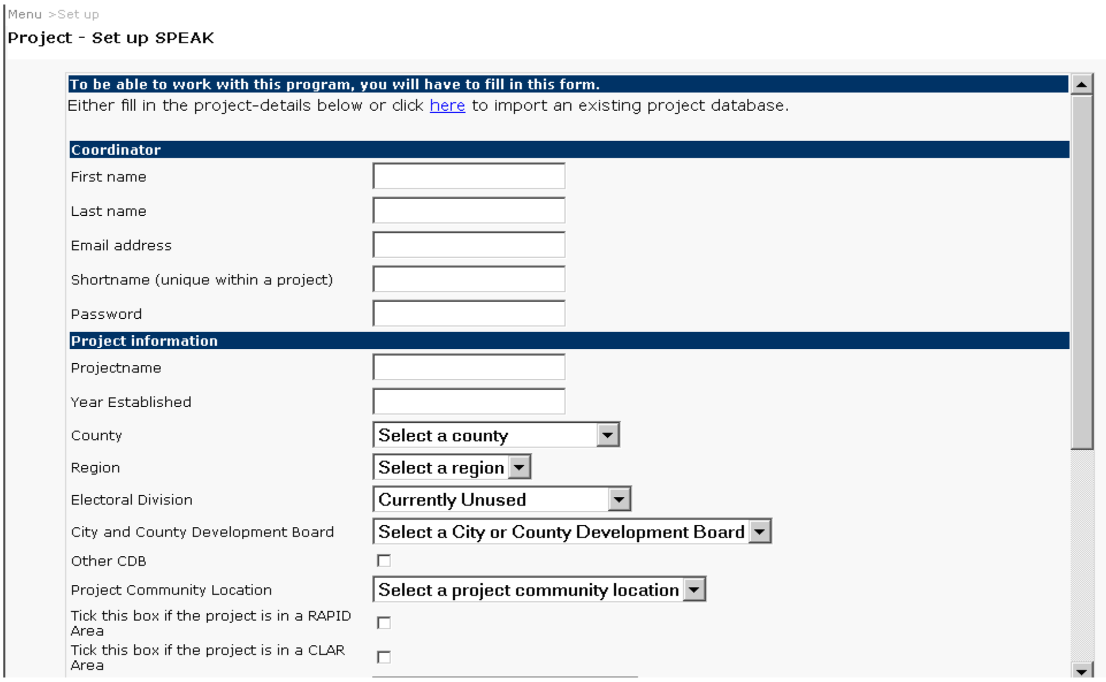
- Project Details Management
- System Administration
- User Management
- Data Management

5.1 *Project Details Management*

The SPEAK Project Details screen, as shown below, is displayed as the first screen on entering SPEAK for the first time. It can also be subsequently displayed by selecting Project Details Management from the SPEAK Administration menu, as above.

Note: The Coordinator Details are requested at the same time as Project Details on the first entry to SPEAK after installation. Should these details require to be amended subsequently, they can be changed through the User Management section, as explained at 5.3 below.

The Project Details section holds information about the project itself. It is used in reporting to identify the project, and, when the completed data is transmitted to join other projects in the overall database, the other pieces of information gathered here will be used for regional and project-type analysis.



5.1.1 Coordinator Information

These details are ONLY required on first entry to SPEAK after installation:

These user details are for the Coordinator, who will become the main user of the system, with Administrative rights, including the rights to set up other users, export data etc. This user should be the project coordinator.

First Name, Last Name	Coordinator's First and Last Name
Email Address	Coordinator's own email address within project, or general project email address if no individual address available
Shortname	Will be the Login Name of the Coordinator. Needs to be unique within the project (for example, can be the Coordinator's first name if unique within project)
Password	Only users with Administrative rights, such as the user now being set up, will require a password. Choose a password which will be used subsequently to logon when the Shortname above is selected.

5.1.2 Project Details

This information is displayed on first entry to SPEAK, and also on selecting Project Details Management from the SPEAK Administration menu. The details can be updated as required. On first entry, many of the fields are required. You will not be allowed to progress beyond this screen until these fields are complete – error messages will identify any fields that are mandatory.

Project Name	Project Name
Year Established	Year in which project was established
County	Select County from the dropdown list
Region	Select Region from the dropdown list
Electoral Division	Unused
City and County Development Board	Select the CDB from the dropdown list with which the project has the most significant relationship.

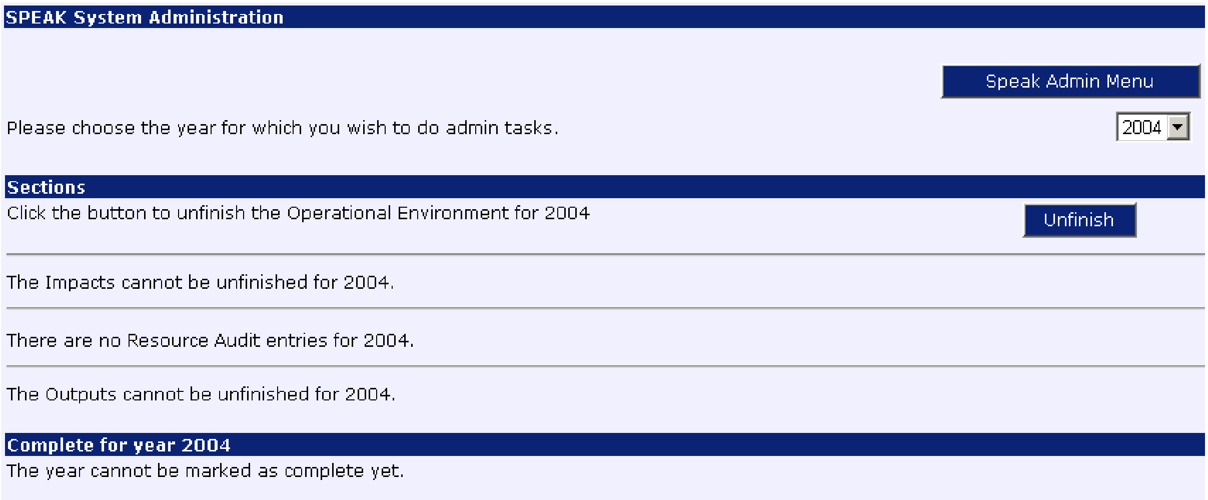
Other CDB	If the project has a significant relationship with more than one CDB (for example it's based in a city but has a significant relationship with both the city and county CDB) then tick this box
Name of Other CDBs	If the Other CDB box, above, is ticked, then this box will appear. Fill in the names of the other CDBs with which the project has significant relationships
Project Address	Mailing Address of project
Phone/Fax/Email/Web	Contact details for project
Description	Description of the project This may be a few short lines about the project, but could also include a mission statement or brief details/background to the project

When all the information has been entered, click on **'Save'** to save the entered information.
If any information is missing, error messages will be displayed requesting the missing information. Complete and click on Save again to progress.

5.2 System Administration

The SPEAK System Administration screen allows sections which have been closed to be reopened or "unfinished". On entry to this screen, select the year you are interested in from the dropdown. Any sections which have been marked as complete for that year (like Operational Environment in the screenshot below) will have an **'Unfinish'** button displayed next to them. Clicking this button will reverse the completion of that section for that year and allow the addition and editing of information.

This feature can also be useful when an individual Resource Audit has been accidentally marked as complete and needs to be reopened for further information. A staff member with admin rights can use this screen to reopen any section of SPEAK.

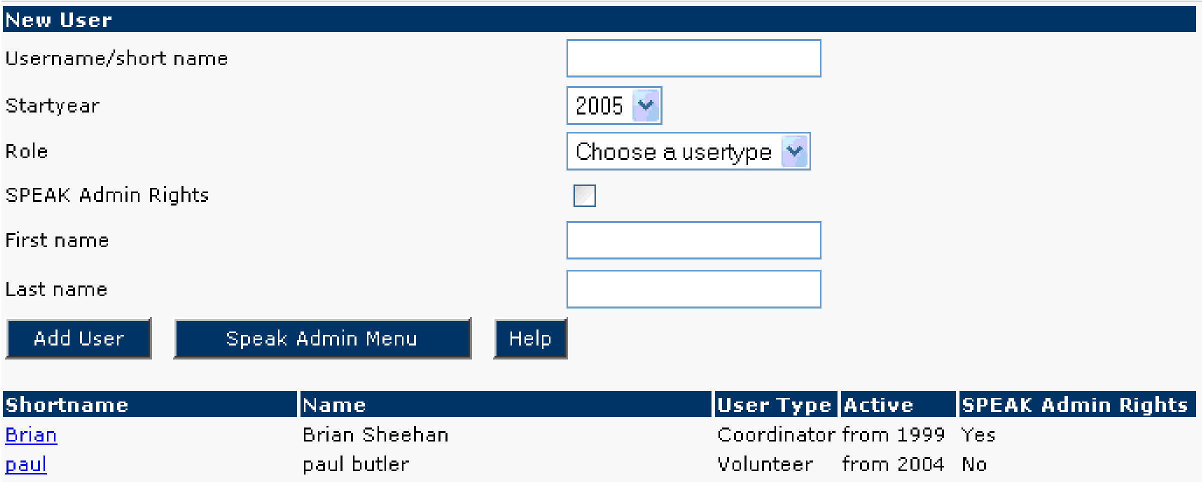


5.3 User Management

The SPEAK User Management screens allow further users to be setup on the SPEAK system. The first user will have been set up when SPEAK was being installed and the project details were being entered. This user will have admin rights and will be able to set up further users.

Each person who will enter a Resource Audit – each staff member or volunteer – will need separate logons to SPEAK. These logons can be set up here.

The User Management Screen is as follows:



The top portion of the screen allows new users to be set up. The bottom portion displays all users already set up, and allows any amendments. To amend an existing user, click on the user name. Their details will display in the top portion of the screen and can be amended as necessary.

To add a new user:

- *Enter a unique Username or Shortname*. This is the name by which they will log on to the SPEAK system.
- *Enter a Start Year*. This is the year for which they will start using the SPEAK system. The system will later require that all staff who are active in any particular year have completed Resource Audits before that year can be finished.
- *Enter a Role*: The roles of people who work with the project are split among the list displayed. Choose the most appropriate one.
- *SPEAK Admin Rights*: These rights allow the User to set up further users and to access the other sections of SPEAK, including Operational Environment, Outputs, Impacts, Reporting and SPEAK Administration. Users without admin rights only have access to their own Resource Audit. SPEAK Admin rights should only be given to the coordinator and perhaps the administrator. Those with SPEAK Admin rights will need a password to logon.
- *First and Last Name*: the User's first and last name.

Once all details have been entered (or changed if amending a user), click on Add User or Save Changes accordingly. The user's details have now been added/amended.

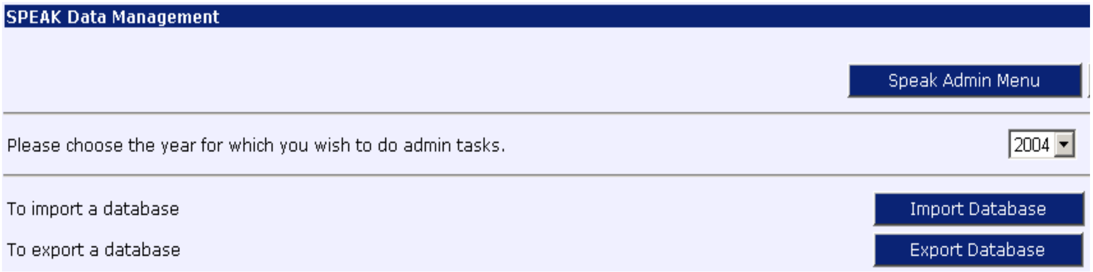
5.4 Data Management

The Data Management functions allows for importing and exporting of the project data. This facility allows for backup of data, for transfer between computers in the project and for eventual transmission to the overall database.

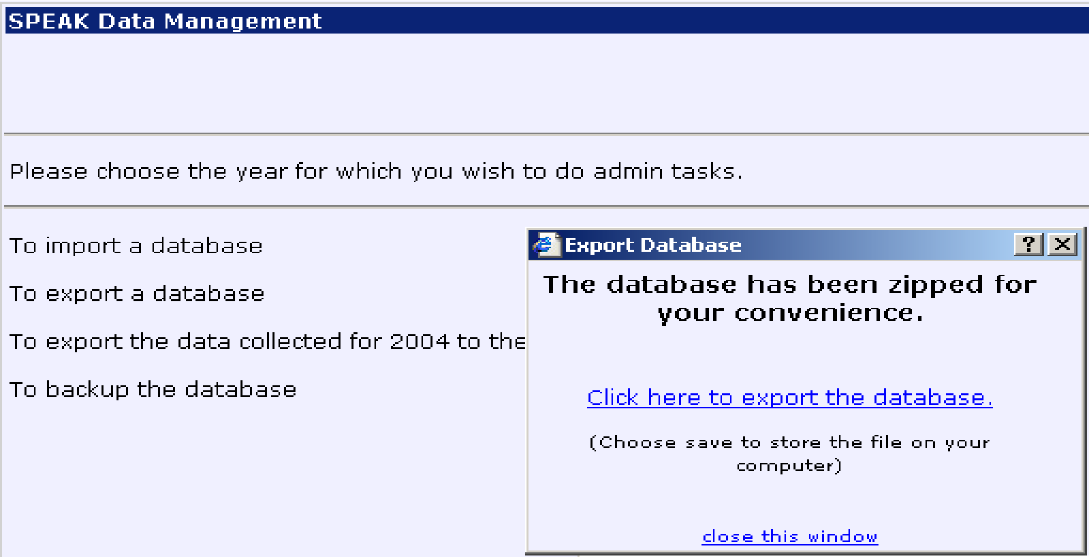
Follow the instructions below to export the data (exporting simply means creating a copy of the database). The file which results can be saved elsewhere as a backup or emailed to the overall database. For transfer between computers within the project, see the further information at 5.4.2 below.

5.4.1 Exporting the Database

Click on '**Data Management'** from the main Administration menu to display the menu below, the Data Management menu.



Click on **'Export Database'**. That will display a further small menu as below:



This indicates that the database has been compressed, so that it is easier to save on a disk or other backup device, or can easily be emailed.

Click on '**Click here to export the database'** to choose a location to save this compressed database.

From the list of Files displayed (similar to the file display when you are choosing to save a new Word Document etc.), select the location to save the database.

If the copy is for backup purposes, you may like to identify the file by renaming it to indicate perhaps the date the backup was taken or some other useful information.

Click on '**Save'**. The SPEAK Database will now be saved at the location specified.

To return to the main SPEAK menu, click on '**Menu'** at the top of the screen.

5.4.2 Transferring data between computers

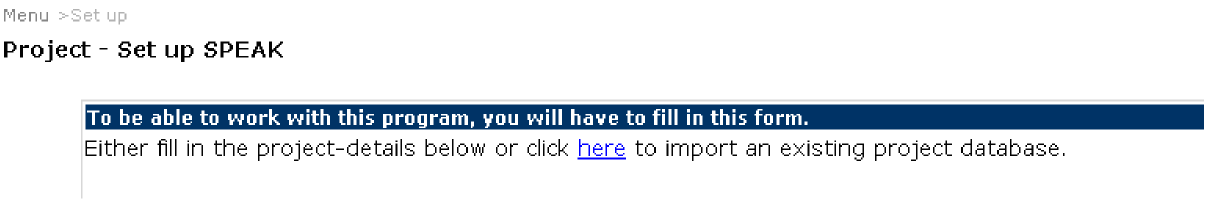
Note: transferring data between computers can become quite confusing and problems can arise if users are making different inputs to different versions of SPEAK; data like this cannot be automatically merged at a later time. Best practice is to keep SPEAK on one computer and to only transfer to another when very necessary, such as a move to a laptop to link up to a projector, for example.

To import the data to a second computer for the first time you will need to do two things in advance:

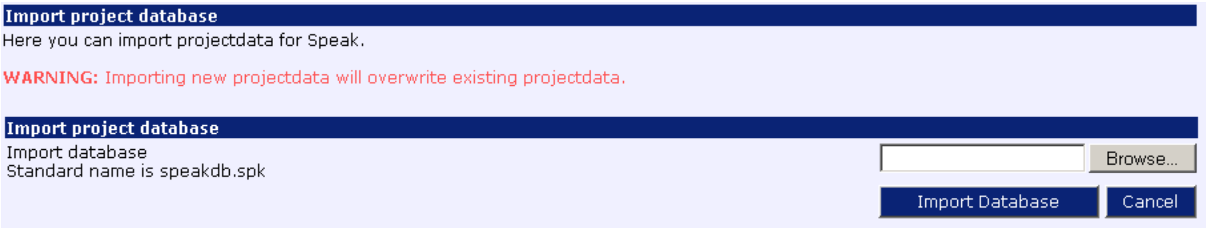
- Export your existing data, as in 5.4.1 above, saving it to a disk or drive which you can access from the second computer

- Install the SPEAK package on the second computer, stopping when you have come to the initial project details page

When you reach the initial project details page, you will see an option to import an existing project database.



Click on ‘**here**’ and the following screen will be displayed.



You can now browse for the file you exported from your first computer (speakdb.spk) and click on **‘Import Database’** when you are ready. The data you exported will be uploaded to SPEAK on this computer.

Transferring data to a computer which already contains SPEAK data is a very similar process. Open SPEAK as a user with admin rights and click on **‘Admin’** at the top of the main menu screen. Next click on **‘Data Management’** and then on **‘Import Database’**. The screen above will be displayed and you can browse for the data you want to import as before.

Note: this action will OVERWRITE any existing SPEAK data in the computer you are working on. You should be very careful with this feature and only use it when you are absolutely sure that the data you are importing is the most correct version and completely supersedes the version you are overwriting.