



# Navigating the Project Start-up Journey

## KEY MEETINGS AND EVENTS

Please note that this is *not* a comprehensive list of all key actions or other activities during project start-up; see Project Management Standards 6-10 for additional key actions.



PRE-AWARD

QUARTER 1

MONTH 4

### EARLY START-UP PLAN DEVELOPMENT MEETING

No later than 1 month before anticipated project start-up



### HANDOVER

As soon as possible after project approval, when project staff are in place

### INTERNAL PROJECT LAUNCH MEETING

Within a few weeks of start-up



### START-UP MEETINGS AND WORKSHOPS

Months 1-3

### EXTERNAL PROJECT LAUNCH EVENTS

As per the Early Start-up Plan



### DETAILED PLANNING MEETINGS

Months 1-3, after start-up meetings and workshops



Roll your cursor over the Standard number to read the related Key Action/s



Your "Compass coordinates"

**HANDOVER BRIEFING**  
Internal

**HANDOVER MEETING**  
Internal

**PROJECT FINANCIAL START-UP MEETINGS**  
Internal  
CRS and partners

**PROJECT VALIDATION DISCUSSION/ MEETING\***  
CRS and partners

**PROJECT START-UP WORKSHOP\***  
CRS and partners

**DETAILED IMPLEMENTATION PLAN (DIP) WORKSHOP\***  
CRS and partners

**SMILER COACHING WORKSHOP**  
Internal-External

\*These events may be organized as the first part of a joint start-up/DIP workshop. See table on the next page for more details.

After the DIP workshop, the DIP guides start-up and implementation



### EARLY START-UP PLAN

All of the meetings/events above should be scheduled in the Early Start-up Plan

### DIP



## Navigating the project start-up journey using Compass: Key project start-up phase meetings and events

No.	Meeting/event	Purpose and Compass coordinates*	Suggested duration	When to organize	Internal or external participants	Meeting/event outcome
1	<b>Early start-up plan development meeting</b>	Develop the early start-up plan, which will guide project activities through development of the detailed implementation plan  Compass coordinates: Standard 6, key action 2 Standard 9, key actions 1 and 4	Varies by project complexity; estimated 2 hours to 1-2 days	No later than 1 month before anticipated project start date; earlier for larger, more complex, and other strategic projects; as soon as possible for emergencies	<b>Internal-external:</b> Project manager (PM); key CRS and partner operations and program staff; country program senior management as appropriate  <i>CRS and partners may develop plans in a joint meeting, or sequenced meetings.</i>	CRS and partners have a clear and comprehensive plan for timely operations and programmatic start-up.
2	<b>Handover briefing</b>	Brief the project manager separately on proposal process, documents, and sensitive issues  Compass coordinates: Standard 6, key action 3	1-2 hours	During the first week of the PM's onboarding	<b>Internal:</b> Proposal Transition Manager (PTM) and PM, with Country Representative (CR), Head of Programming (HoP), and Head of Operations (HoOps) as relevant	The incoming PM understands key issues related to the proposal development process and any sensitive issues; knows how to navigate the proposal documents; and knows the status of early start-up actions.
3	<b>Handover meeting</b>	Transfer knowledge from the proposal development team to the project start-up team  Compass coordinates: Standard 6, key action 3	2-4 hours	Before the validation meeting and start-up workshop; preferably as soon as possible following project approval once the core start-up/implementation team is in place  <b>Timesaver:</b> <i>For projects of more limited scope or complexity, it may be possible to organize handover at the beginning of a project start-up meeting.</i>	<b>Internal:</b> PTM and PM with other members of the proposal development team and the start-up/implementation team  <i>Tip: If there are only a few new team members, organize handover as part of their onboarding rather than arranging a formal team-to-team meeting.</i>	The start-up/implementation team has the appropriate project (and donor) background to lead an effective project start-up.
4	<b>Project financial start-up meeting</b>	Review project financial management roles and responsibilities  Compass coordinates: Standard 8, key actions 3 and 5 Standard 10, key action 2	1 hour	After the handover meeting	<b>Internal:</b> PM, HoP, HoOps, Finance Manager (FM) and Finance Officer/Accountant, and any other programming staff with project budget management responsibilities	Key staff understand the project financial management requirements and specific project team financial management roles, responsibilities, and deadlines.  The project team has identified any special project financial management issues to highlight with partners.
5	<b>Project validation discussion/meeting</b>	Initiate the process of reviewing all proposal components considering any changes in the project context between proposal development and project approval  Compass coordinates: Standard 7, key action 1	Varies by project: Half-day (small project); 1 week (DFAP)	Within the first month, after final donor approval for externally funded projects  <b>Timesaver:</b> <i>For smaller and/or more straightforward projects, integrate project validation as the first agenda item in the project start-up meeting/workshop.</i>	<b>External:</b> CRS, partner, consortium project staff (key staff, managers, technical leads), MEAL Regional Technical Advisor (RTA), and other technical advisors as relevant	<ul style="list-style-type: none"> <li>• Identification of any adjustments/changes needed to the project document.</li> <li>• Updates to relevant materials, e.g., Proframe, logframe, staffing plan, etc.</li> <li>• (If applicable) Formulation of request to donor for any changes requiring donor approval.</li> </ul> <p><i>Note: These are the outcomes of the wider validation process, which may require more than just the meeting.</i></p>
6	<b>Award kick-off call/meeting (Grant-funded projects only)</b>	Review key award details, including deliverables, terms and conditions, and expectations of the various CRS staff involved in award management  Compass coordinates: Standard 10, key action 2	Varies by project but usually 1 hour or less	Following award signature  <b>Timesaver:</b> <i>Combine with the project financial start-up meeting.</i>  If the award manager is not a country program staff member, organize a call instead of a meeting	<b>Internal:</b> PM, award manager (if different from PM) and/or other donor engagement staff, HoOps, HoP, FM and finance officer/accountant assigned to the project, and other senior managers as needed	The CRS project team is clear on award management deliverables, deadlines, roles and responsibilities.  The CRS project team has identified: <ul style="list-style-type: none"> <li>• Key award and compliance details to cover during the project start-up workshop</li> <li>• How CRS will review these issues with partners</li> </ul>

\* The "Compass coordinates" direct you to the CRS Project Management Standard and key action where you can find more information about the meeting/event and how to organize it.



No.	Meeting/event	Purpose and Compass coordinates*	Suggested duration	When to organize	Internal or external participants	Meeting/event outcome
7	<b>Project start-up workshop</b>	<p>Orient the full CRS and partner project team to the validated project design, requirements, schedules, etc.</p> <p>Compass coordinates: Standard 7, key action 2 Standard 8, key action 6 Standard 10, key actions 2 and 4 (for grant-funded projects)</p>	1-3 days, depending on project scope and number of partners	<p>Early in the first quarter, after validation of project design, but before the DIP workshop</p> <p><b>Timesaver:</b> For smaller and/or more straightforward projects, it may be possible to organize a joint start-up and DIP workshop.</p>	<b>External:</b> CRS, partner/consortium project teams, including senior leadership, other stakeholders involved in project implementation	<p>Partner senior leaders understand the project and compliance requirements. All project staff are oriented to key project components and requirements, including compliance issues, and are prepared to participate effectively in DIP development and subsequent project start-up activities (e.g., launch events).</p> <p><b>Timesaver:</b> Take advantage of bringing stakeholders together for the start-up workshop to convene the first meeting of the project governance structure (Compass coordinate: Standard 6, key action 5).</p>
8	<b>Internal project launch meeting</b>	Ensure internal stakeholders (e.g., all CP staff) are aware of the new project	1 hour	<p>Within the first few weeks of project start-up</p> <p><b>Tip:</b> Invite all staff; focus on celebrating the project's approval as well as sharing information about the project.</p>	<p><b>Internal:</b> All CP staff</p> <p><b>Note:</b> This may be combined with already-scheduled staff meetings.</p>	<p>Internal stakeholders know the basics of the new project (donor, funding level, duration, partners, geographic area, objectives and major activities) and its expected impact.</p> <p><b>Tip:</b> If the project team has prepared a <a href="#">project overview brochure</a>, share copies with CRS colleagues.</p>
9	<b>External project launch with stakeholders (national, regional, and/or community-level depending on project)</b>	Formally initiate the new project and strengthen host government, community, and other key stakeholders' awareness and understanding of and support for the project	Varies, generally about a half-day each	Per the timing in the early start-up plan	<b>External:</b> CRS, partner, consortium leadership and project teams, donor, host government representatives (national/regional/local), other NGOs, UN, media	External stakeholders have information on the project, and know how they can engage with project staff and project activities.
10	<b>DIP workshop</b>	<p>Initiate the process of further detailing and adjusting the project activities schedule to facilitate effective project implementation.</p> <p>Compass coordinates: Standard 7, key action 3 Standard 10, key action 4</p>	<p>Varies by project: 1 day (small project); 1 week (e.g. DFAP)</p>	<p>Month 1 for projects of less than 12 months in duration; Quarter 1 for projects of more than 12 months in duration</p> <p><b>Timesaver:</b> For smaller projects and/or more straightforward projects, it may be possible to organize a joint start-up and DIP workshop.</p>	<b>External:</b> CRS, partner, consortium leadership and project teams	<p>The project team has a shared understanding of and agreement on the timing, sequencing, and roles and responsibilities for Year 1 activities.</p> <p><b>Note:</b> This is the outcome of the wider DIP development <a href="#">process</a>, which is more than just the workshop.</p>
11	<b>SMILER coaching workshop</b>	<p>Turn the proposal MEAL plan into a project MEAL system and operating manual</p> <p>Compass coordinates: Standard 7, key action 4</p>	1 week (shorter for smaller projects or longer for very complex projects)	After the start-up workshop, and ideally after DIP finalization; in sufficient time to allow for MEAL operating manual finalization within 120 days of project start, per MEAL Procedure 1.2	<b>Internal-External:</b> A small group of CRS and potentially partner project management staff, sectoral technical staff, and MEAL staff	<p>The project team has a draft of the project MEAL operating manual, including:</p> <ul style="list-style-type: none"> <li>Final list of project indicators</li> <li>Drafts or final versions of project data-gathering forms and reporting formats</li> <li>Data flow, communication, and reporting maps</li> </ul>

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