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# Advisory services resource pack for Organisations of Persons with Disabilities (OPDs): Resource 5: Setting up an advisory project



*This resource covers the process of setting up a new advisory services project, after an OPD has already signed a contract or made an agreement with another organisation.*

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## Getting started with a new project

Once a contract is signed, then there are usually several steps that need to be taken to get an advisory project up and running.. It may be necessary to make more detailed plans and arrangements for meetings, for sharing and keeping documents, or for initiating a new event or setting up a regular event.



**OPDs who have successfully delivered advisory services say that the three most important elements are (1) building good relationships, (2) planning and (3) ensuring effective communications.**

This can be an exciting time, when people celebrate the idea of working together and contributing to making something happen. There may be lots of work to prepare for new tasks and processes. It can also be a time when people come to realise the real implications of what has been agreed on, or identify challenges involved in delivering services.

OPDs and contracting organisations may need to discuss and negotiate which are the best ways to communicate or share information. This could involve meetings, discussions and sharing or development of guidance or manuals. Other advisory work may involve forms or consultations to share the experiences, stories, and perspectives of people with disabilities.

Some guiding questions at the stage of project start-up include:

- Are the people who will be delivering the advice available and appropriately skilled to contribute, as well as open to learning how to undertake this work over time? If they need access to new information and skills, how will the OPD support this?
- What do we need to do in terms of information technology (IT) or human resources (HR), and financial management systems to support the provision of advice with this organisation? Are these systems available and ready for the OPD to use in the delivery of advisory services?
- What do we need to do to ensure the contracting organisation understands the practicalities of disability inclusion, such as scheduling meetings in accessible venues, allowing time for translation, budgeting for reasonable accommodation and accessible transport etc.?
- Is there a clear lead or focal point person for coordination and communication in both the OPD and contracting organisation?

## **Kick-off or start-up meetings**

In practice, the beginning of a new contract involves meetings between the OPD and the contracting organisation about the specifics for the implementation of advisory services. Since these early meetings can set the tone of the interaction for the whole length of the arrangement, it is important that communications are highly effective, so everyone is 'on the same page' and there are clear agreements about all aspects of the work.

The documentation of meeting discussions is particularly important, since most development and humanitarian organisations operate on the basis of written documents, rather than verbal agreements. This may be a good test of basic accessibility principles – for example, if the contracting organisation does not make documents accessible for the advisors working on the project, then this will need to be discussed and addressed now before services can be provided in future.

If other organisations are engaged in providing the advisory services, there is much value in bringing them into early meetings and discussions, so they can contribute their own ideas and expectations. For example, if a national OPD is expecting a district level group to be involved, they need to participate in discussions about what is expected of them and how they can be appropriately supported and resourced to participate.



# Planning advisory activities

In early discussions after a contract has been signed, there will need to be some more detailed planning within the OPD. This might include setting dates for events, meetings, deadlines, and reports, and working backwards from deadlines so people who are providing services know when each activity needs to be started. This involves basic resource allocations, to define how much time is needed by each staff person. If additional resources are needed, these need to be planned for and organised early too.

Some guiding questions to support scheduling and planning are:

- Have we allocated time to build the relationship between the OPD and the contracting organisation team?
- Have we thought through all the tasks involved, how long they will take, how many people will be involved and the time it will take to document progress?
- How and when will we start work on the various deliverables?
- What are the best ways or methods to provide advice or information to contracting organisations?
- When, on what platform, and how often will we communicate with the contracting organisation about our progress, any issues that are arising and any changes we would like to suggest?
- Have we shared our calendar of processes and events with all team members who might need to contribute and be aware of the provision of advisory services under this contract?
- Are we coordinating the work involved in this contract with other contractual commitments and other workplans? Do we have a 'Plan B' in case there is a clash of the various commitments?



# Delivering services

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In providing advice under contracts, managing clients expectations is the most challenging issue raised by experienced OPDs. This involves communicating about issues that the contracting organisations may not understand themselves. For example, some may not understand that they need to provide reasonable accommodation measures for OPD staff to participate in meetings, or they may not understand that persons with disabilities have often faced barriers in accessing education and work opportunities, so may not feel confident to prepare written documents in English or at the 'standards' expected of international partners.



In this context, OPDs are encouraged to communicate clearly with contracting organisations about what level of advice they can provide, what form it can be expected to be provided in (e.g., verbal, written, what language) and whether additional resources may be required for documents to be developed at the standards determined adequate by the contracting organisation.

Seeking peer group support for the development of deliverables may be a useful process for OPDs to organise. For example, an OPD staff member may draft an advisory document and then have a system in place for someone else within the OPD or within a partner organisation, to provide additional writing, editing, or formatting support.

OPD staff members who are delivering advice may benefit from being supported through access to professional development or training, for example in writing formal documents, project management and using IT software. They may be allocated a mentor or coach who can assist them to increase their skills and confidence, at the same time that they are gaining experience through delivering advice. Over time, the OPD staff member will develop experience and expertise, so they can in turn contribute to increasingly complex deliverables.

