

## Toolkits and Templates for Project Management

Throughout the training, we mentioned several tools and templates that can greatly assist in managing agroforestry projects. Below is a consolidated list of **recommended resources**, categorized by their use. Extension advisors and trainers can use these to plan and execute projects more efficiently. Many are available online for free – explore them and adapt to your needs.

### Project Planning & Management:

- **Work Breakdown Structure (WBS) Templates:** Tools like MindMeister offer mind-mapping templates that can be adapted as WBS outlines for projects. Breaking down tasks in a visual mind map can help brainstorm all necessary activities.
- **Gantt Chart Software – GanttProject:** GanttProject is a free, open-source desktop application to create Gantt timelines easily. It is user-friendly for those new to project scheduling. You can also use Excel or Google Sheets to create simple Gantt charts if software is not available.
- **PM4SD (Project Management for Sustainable Development):** PM4SD is a specialized framework for managing sustainability projects (like rural development, conservation). It provides guidelines and templates (project charters, risk logs, etc.) tailored to sustainable projects. Look up the PM4SD manual for structured approaches that might be relevant to agroforestry programs.

### Links

- GanttProject (Free Software): <https://www.ganttproject.biz/>
- Work Breakdown Structure (WBS) Mind Mapping (MindMeister): <https://www.mindmeister.com>
- PM4SD – Project Management for Sustainable Development: <https://www.pm4sd.org/>
- AF4EU Alive handbook ([www.agroforestry.net](http://www.agroforestry.net))
- AF4EU DST ([https://platform.af4eu.eu/knowledge\\_cloud](https://platform.af4eu.eu/knowledge_cloud))
- AF4EU knowledge cloud ([https://platform.af4eu.eu/knowledge\\_cloud](https://platform.af4eu.eu/knowledge_cloud))
- AF4EU MOOC (<https://platform.af4eu.eu/online-courses>)

### Stakeholder Engagement:

- **Stakeholder Mapping Guide (MindTools):** The MindTools website has a guide on performing stakeholder analysis (search for “MindTools Stakeholder Analysis”). It includes templates for Influence/Interest matrices and tips on managing stakeholders at each quadrant.
- **Community Engagement Toolkit (IFAD):** The International Fund for Agricultural Development (IFAD) has a community engagement toolkit (available on IFAD’s website) which provides participatory methods for working with rural communities – many ideas can be applied to involving communities in agroforestry initiatives (like how to run community meetings, use of village theater for education, etc.).
- **Stakeholder Engagement Checklist:** Remember to: identify all key decision-makers, assess their influence and interest, and involve them early. Use a simple checklist to ensure you have not missed any group (men/women, youth, local authorities, etc.). Engaged stakeholders = smoother projects.

### Links

- MindTools Stakeholder Mapping Guide: [https://www.mindtools.com/pages/article/newPPM\\_07.htm](https://www.mindtools.com/pages/article/newPPM_07.htm)



- IFAD Community Engagement Toolkit: <https://www.ifad.org/en/community-driven-development>
- FAO Stakeholder Analysis Guidelines (PDF): <http://www.fao.org/3/i8655en/i8655EN.pdf>

## Funding & Scaling Resources:

- **EU Funding Programs:**
  - *Horizon Europe:* Check the European Commission's Horizon Europe portal for calls related to agroecology or climate adaptation – these often fund multi-actor projects (keyword search “agroforestry” in the funding & tenders portal).
  - *LIFE Programme:* The LIFE program website lists ongoing and past projects – a good place to see examples of funded agroforestry projects and find contacts. They also publish calls for proposals annually in areas of environment and climate.
  - *EIP-AGRI Operational Groups:* Each EU country has a section on the EIP-AGRI site listing Operational Group projects – many have done agroforestry. It's a good inspiration and network resource.
  - AF4EU web page with the alive handbook, the knowledge cloud and the business model DST
- **Carbon Financing – Gold Standard:** The Gold Standard is a certification for carbon offset projects. They have methodologies for agroforestry and afforestation. If looking to design a project that could earn carbon credits, their site and manuals are a must-read. (They ensure projects have high environmental integrity and also community benefits.)
- **FAO Agroforestry & Finance Resources:** FAO has publications on innovative financing for agroforestry (search FAO site for “*Agroforestry financing mechanisms*”). These discuss case studies like payment for ecosystem services, microfinance for farmers, etc. that could inspire hybrid funding models.
- **Logic Model Templates:** When planning scaling or writing proposals, a logic model can be helpful. Websites like USAID's MEASURE Evaluation (if still available) have templates for developing logic models and M&E plans for agricultural projects.

## Links

- Horizon Europe Calls & Portal: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/>
- EU LIFE Programme Calls & Database: [https://cinea.ec.europa.eu/life\\_en](https://cinea.ec.europa.eu/life_en)
- Gold Standard for Agroforestry Carbon Credits: <https://www.goldstandard.org/>
- FAO Agroforestry Financing & Carbon Tools: <https://www.fao.org/forestry/agroforestry/finance>

## Risk Assessment & Adaptive Management:

- **Risk Matrix Template (SafetyCulture):** SafetyCulture's 5x5 Risk Matrix Template is a free resource that provides a framework to assess and rate risks. It is a generic template (often used in workplace safety) but can be tailored for agroforestry by defining project-specific risks. You can download it as PDF/Excel and modify the risk factors and mitigation sections.
- **Climate Risk Tools (FAO):** FAO's Climate-Smart Agriculture toolkit includes tools for climate risk screening and management. They have guides on assessing drought risk, selecting climate-resilient crop varieties, etc., which are very relevant when planning agroforestry in the face of climate change.



- **Risk Register (Excel):** A simple Excel sheet can serve as a Risk Register – list risks, likelihood, impact, mitigation, owner, and status. Update it quarterly with any new risks or changes in status (e.g., “Drought risk – occurred in July, mitigated by irrigation tanks, impact reduced”).

#### Links

- SafetyCulture 5x5 Risk Matrix Template: <https://safetyculture.com/checklists/5x5-risk-matrix-template/>
- FAO Climate-Smart Agriculture Tools: <https://www.fao.org/climate-smart-agriculture/knowledge/toolbox/en/>

## Monitoring & Evaluation (M&E):

- **M&E Frameworks for Agroforestry (MEASURE Evaluation):** The now-concluded USAID MEASURE Evaluation project had toolkits for agriculture and natural resource project M&E. Their resources on developing indicators and data collection methods can be very insightful (even though not agroforestry-specific, they cover agro-environmental projects).
- **KoboToolbox:** KoboToolbox – This free platform lets you create forms for data collection (surveys, monitoring forms) and deploy them to mobile devices. Data can be viewed online and downloaded. It’s excellent for field teams who need to gather data offline (like on farms) and then sync when back online. For example, you can create a Kobo form for annual tree monitoring (height, health, etc.) with GPS coordinates and photos.
- **GIS & Remote Sensing:** Tools like QGIS (open source GIS) or Google Earth Engine (for satellite data analysis) can greatly enhance monitoring. You can use NDVI (vegetation index) from satellite images to see if vegetation cover is increasing. There are also specific tools like Collect Earth (by FAO) for monitoring tree cover through satellite imagery, which might be useful for large-scale projects.
- **Dashboard Tools:** Consider using Google Sheets or Excel to create simple dashboards (with charts) of your project metrics that update as you input data. There are also online platforms like PowerBI or Tableau for more sophisticated analysis if you have the skills, but those may be overkill for most extension projects. Simpler is often better – even a Word document with a table of “Indicator – baseline – current – target – status” updated quarterly is great for tracking and reporting.

#### Links

- KoboToolbox (Free mobile data collection): <https://www.kobotoolbox.org/>
- MEASURE Evaluation M&E Templates: <https://www.measureevaluation.org/resources/tools>
- Open Foris Collect (Forest/Agro data): <https://www.openforis.org/tools/collect.html>
- Google Earth Engine (for satellite monitoring): <https://earthengine.google.com/>

## Team Collaboration:

- **Trello / Asana:** Reiterating from earlier, these online platforms are fantastic for keeping teams on the same page. Trello’s interface is very intuitive. Asana offers more structure (like timeline view, subtasks, etc.) and is free for small teams. Use these to assign tasks, set deadlines, and comment on progress in one place. This reduces endless email chains.
- **Communication Apps:** For quick communication, consider WhatsApp groups for the project team or stakeholder groups (almost everyone uses WhatsApp in Europe). Telegram or Signal are alternatives. Just set



some basic rules (e.g., use for quick updates/emergencies, but official decisions go in email/minutes). Slack is another popular tool for teams, offering organized channels for different topics (could have #field-reports, #admin, #general for a project). It's free for basic use.

- **File Sharing:** Make sure the team has a shared repository for documents – Google Drive, Dropbox, or a project management system. This way, templates and working documents are accessible and not lost on one person's laptop. Structure the folders by category (Plans, Reports, Data, etc.). This also helps immensely in closure phase when compiling outputs and handing over knowledge.

### Links

- Trello for Project Boards: <https://trello.com/>
- Asana for Project Management: <https://asana.com/>
- Slack for Communication (free plan): <https://slack.com/>
- Google Workspace (Docs, Sheets, Drive): <https://workspace.google.com/>

By leveraging these toolkits and resources, agroforestry advisors can save time and avoid reinventing the wheel. Each project will still need the human touch – leadership, negotiation, creativity – but these tools provide a strong backbone for efficiency and consistency. We encourage you to explore them, and in true agroforestry spirit, **share with the community** any new tools or templates you develop.

### OUTCOMES OF THE COURSE MODULE

- Understanding of key project management frameworks and tools
- Skills to plan timelines, budgets, and stakeholder engagement
- Ability to manage risks and adapt projects over time
- Confidence to design and deliver impactful agroforestry projects

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