

PROJECT DOCUMENTS

The territorial dimension in the framework of the 2030 Agenda for Sustainable Development

A methodological guide for strategic
planning in a territory



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Contents

Introduction	5
I. A reading of today's world: the 2030 Agenda and its challenges in the territory.....	7
II. Planning the territory for building the future	9
A. Learning path.....	9
1. Workshop I: Constructing a situation analysis	10
2. Workshop II: Core problems in the territory	11
3. Workshop III: Construction of the problem and objective trees	13
4. Workshop IV: Strategies for the territory	16
5. Workshop V: Actors map.....	19
6. Workshop VI: Project proposals	21
7. Workshop VII: Results-based project management and the 2030 Agenda	23
8. Workshop VIII: Project management indicators	24
Bibliography.....	27

Tables

Table 1	Core objective-SDG relationship	15
Table 2	Examples of strategies.....	17
Table 3	SWOT Matrix.....	18
Table 4	SWOT matrix concepts	18
Table 5	Strategies and linkage to SDG targets	19
Table 6	Actor matrix	20
Table 7	Actors map symbols	20
Table 8	Logframe matrix.....	21
Table 9	Integrated logframe matrix.....	24
Table 10	Indicator check	25

Figures

Figure 1	Vester Matrix	12
Figure 2	Dependence-influence values per problem	12
Figure 3	Influence-dependence axes	13

Boxes

Box 1	Situation analysis.....	10
Box 2	Complexity of the problem	11
Box 3	Problem tree	14
Box 4	Strategic thinking	17

Diagrams

Diagram 1	Methodological steps	10
Diagram 2	Situation analysis.....	10
Diagram 3	Core problem.....	11
Diagram 4	Objectives and the 2030 Agenda	13
Diagram 5	Problem tree	14
Diagram 6	Objective tree.....	15
Diagram 7	Objective tree and the SDGs.....	16
Diagram 8	Strategies for the territory	16
Diagram 9	Actors map	19
Diagram 10	Map of allied, neutral and opposing local actors.....	20
Diagram 11	Project development	21
Diagram 12	Follow-up and monitoring of results	24
Diagram 13	SMART key performance indicators.....	25

Introduction

The purpose of this document is to make available a methodological guide to the territory's actors in order to promote reflection on development practices in the field, taking the subnational level as the unit of analysis. That could be a municipality, an intermunicipal area, or a cross-border area, among others.

This proposal offers a minimum of content and methodology that can be maximized by reading other texts suggested in the bibliography.

I. A reading of today's world: the 2030 Agenda and its challenges in the territory

Every social approach requires a reading of the context for a better understanding.¹

At this moment in time (twenty-first century) in the Western world, which includes the Latin American and Caribbean region, the 2030 Agenda is the framework of action that challenges all signatory countries, with its 17 Sustainable Development Goals (SDGs) divided into 169 targets and 232 indicators.²

The 17 SDGs agreed upon by the Agenda's signatory countries,³ represent the challenges that countries identify as the most important for their development.

The 2030 Agenda is a vitally important proposal for global development for a number of reasons:

- First, it is an ambitious global consensus, the product of a multi-year negotiation process between developed and developing countries that reflects the development priorities of the time.
- Second, it highlights the urgency for the survival of human beings of comprehensively achieving its Goals and targets; proposes a renewed global partnership based on international cooperation and means of implementation (technology, innovation, financing); and emphasizes the importance of tying in all development actors.
- Third, it is a framework for action for all countries—regardless of their level of development—that facilitates the formulation of State policies, i.e. long-term policies that reflect country visions agreed upon by all development actors. The complexity for States lies in the fact that the necessary public policies for its implementation must be grounded within the territory; be comprehensive, in terms of encompassing all the different sectors and levels of government; and involve high levels of participation from all actors, particularly those in the private sector.

¹ Paulo Freire, a Brazilian educator, referred repeatedly to the need for a reading of the context or a reading of the world in order more accurately to understand social events in their cultural and geographic settings (see Freire, 1994).

² See [online] <https://www.cepal.org/en/noticias/agenda-2030-desarrollo-sostenible>

³ The title of the resolution adopted in the framework of the seventieth session of the United Nations General Assembly in 2015 is an invitation to all: "Transforming our world: the 2030 Agenda for Sustainable Development". See https://unctad.org/meetings/en/sessionaldocuments/ares70d1_en.pdf.

The Agenda has a civilizing character, because it makes poverty eradication and equality central aims of development. In that regard, since 2010, ECLAC has been working on the equality imperative through five position papers submitted to ECLAC Member States for consideration at the sessions of the Commission from 2010 to 2018.

The Latin American and Caribbean region is the most unequal in the world and one of the manifestations of inequality is territorial. The document *Time for Equality: Closing Gaps, Opening Trails* (ECLAC, 2010) expressed that inequality by noting that place does matter, in order to emphasize the importance of environmental conditions as a factor conducive—or not—to obtaining quality basic services and fostering opportunities for people to have a full life. (See the document at: https://repositorio.cepal.org/bitstream/handle/11362/3066/1/S2010005_en.pdf).

This concept was reinforced in the document *Structural Change for Equality* (ECLAC, 2012), which proposes the necessary convergence of the production structure with a better distribution of production factors, universal social protection and capacity building with environmental sustainability, thus changing consumption and production patterns.

The core purpose of structural change such as that which ECLAC proposes is to achieve equality and inclusion for all, in order to overcome the structural heterogeneity that is such a feature of the region:

“The term ‘structural heterogeneity’ refers to situations of wide differences in productivity or ‘modernity’ between as well as within sectors of economic activity, but accompanied by complex ties of interchanges, dominance and dependence within a national socioeconomic ‘structure’, as opposed to presumed ‘dualistic’ situations in which two socioeconomic structures —‘modern’ and ‘traditional’ or ‘primitive’— coexist in a national territory with only limited interchanges and little influence on each other”. (ECLAC, 1974)

II. Planning the territory for building the future

In this context, it is essential to strengthen the capacities of a territory's own actors, so that they can think strategically as one and the territory can consider matters from its own perspective based on a precise reading of current challenges, including which paths are urgent priorities and which paths are structural and would allow the Agenda's pledge that "no one will be left behind" to be realized.

With that purpose in mind, this methodological guide has been designed with the following aim:

To support the design of a territorial strategic planning process by incorporating the 2030 Agenda in a territory at the local, intermunicipal or subnational level and by including the critical nodes identified as core lines of work, in order to meet the criterion of applying a planning approach that comprehensively considers the 2030 Agenda.

Once territorial strategies have been identified, in order to achieve the 2030 Agenda targets the idea is to devise projects and adopt a results-based management approach in their implementation.

Through its application, this guide is expected to:

- **Contribute** to knowledge of methodological tools that would allow the 2030 Agenda to be mainstreamed in a territorial strategic planning process and its results-based management
- **Encourage** users, based on their own practices, to reflect on the importance of mainstreaming the 2030 Agenda in all public policies, plans, programmes and projects developed in a territory.
- **Identify** strategies to strengthen measures needed to achieve the targets and indicators proposed by the national, subnational or local governments within the 2030 Agenda framework.

This methodological guide contains a set of workshops that can be carried out by the territory's governmental and non-governmental.

Each workshop specifies its objective, inputs, expected results and activities.

A. Learning path

Diagram 1 summarizes the path followed in applying this methodological guide to generate a territorial strategic planning process.

Diagram 1
Methodological steps



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

1. Workshop I: Constructing a situation analysis

Objective:

To construct a situation analysis for the territory (see diagram 2)

Inputs:

Quantitative and qualitative information on the territory

Diagram 2
Situation analysis



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Box 1
Situation analysis

Every planning process requires an analysis that describes the reality of the territory as a whole or of the sector or programme (health, education, housing, basic services, etc.) on which it will be planned.

Matus refers to the analysis as “situational” because that concept better represents the socioeconomic and political contradictions that occur in a territory.

A situation analysis cannot be based on a single examination, but on multiple ones, thus representing as accurately as possible the situation that is “happening” from the perspective of the multiple actors concerned.

The analysis should provide information that discloses the development capacity, opportunities and potential of a territory or sector, as well as the resources available for that purpose. Any problems hindering the realization of that potential should also be identified.

Source: Economic Commission for Latin America and the Caribbean (ECLAC) on the basis of C. Matus, *Estrategia y plan*, Ciudad de México, Siglo XXI Editores, 1998.

Activities and expected results:**Partial output 1:**

A document recording the situation analysis of a subnational/local or intermunicipal territory

The situation analysis should have:

- Indicators, indices and quantitative data that describe the territory in its economic, social and environmental dimensions
- Photographs, maps
- Opinions of key informants
- Field diaries of public officials working in the field, etc.
 - And to highlight a **set of problems** arising from that situation analysis.

2. Workshop II: Core problems in the territory**Objective:**

To analyse the problems identified in the situation analysis of the territory and choose the core problem to be addressed, taking into account economic, social and environmental dimensions. Other dimensions can be considered if necessary (see diagram 3).

Inputs:

Situational analysis report on the chosen territory.

Diagram 3
Core problem



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Box 2
Complexity of the problem

It is important to emphasize that a territory's complexity will prevent that complexity from being reduced a single problem; therefore, it is advisable to think about the dimensions from which a territory can be analysed in order to identify a core problem for each dimension. Thus, for example, a core problem can be considered for each dimension chosen: economic, social, environmental, institutional, etc.

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Activities and expected results:

- Selection of the core problem from the list of problems listed.

Choosing the core problem can be done in two ways:

- (i) The work team agrees by a majority on the most complex and fundamental problem of all those identified.
- (ii) There is no agreement on what the core problem is, in which case a tool called a Vester Matrix can be used.

Figure 1
Vester Matrix^a

Problems	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Sum of influence
1	0															0
2		0														0
3			0													0
4				0												0
5					0											0
6						0										0
7							0									0
8								0								0
9									0							0
10										0						0
11											0					0
12												0				0
13													0			0
14														0		0
15															0	0
Sum of dependence	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

^a Values between 0 and 3 is put each cell or box, where: 0 = No direct causal relationship between the first and second problems; 1 = Indirect causal relationship between the first and second problems; 2 = Moderately direct causal relationship between the first and second problems; 3 = Direct causal relationship.

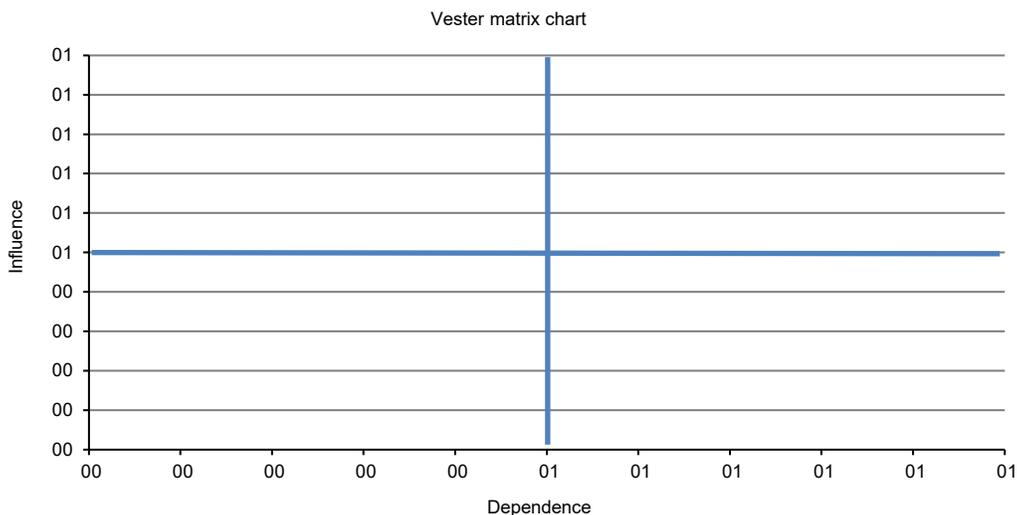
Figure 2
Dependence-influence values per problem^a

Problems	Dependence	Influence
1	0	0
2	0	0
3	0	0
4	0	0
5	0	0
6	0	0
7	0	0
8	0	0
9	0	0
10	0	0
11	0	0
12	0	0
13	0	0
14	0	0
15	0	0

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

^a The values reflected in the influence column correspond to the sum of influences for each variable, and the values in the dependency column correspond to the sum of dependency ratings for each variable.

Figure 3
Influence-dependence axes



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

With the core problem chosen, the Workshop III phase can begin.

3. Workshop III: Construction of the problem and objective trees

Objectives:

- (i) Build the problem tree for the problems identified in the territory and its corresponding objective tree.
- (ii) Link the core objective to any or all of the SDGs and targets that you consider appropriate.

Inputs:

Workshop II with the core problem chosen.

Diagram 4
Objectives and the 2030 Agenda



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Box 3
Problem tree

The more roots the tree has, the greater the possibility of developing answers to solve the core problem posed.

Drawing a problem tree has its limitations. Since knowledge is produced in a social and political environment, it is not neutral and always implies an interpretation of the world that is subjective, specific to the person building it.

A model like this is only a tool, the usefulness of which is the best part of its truth.

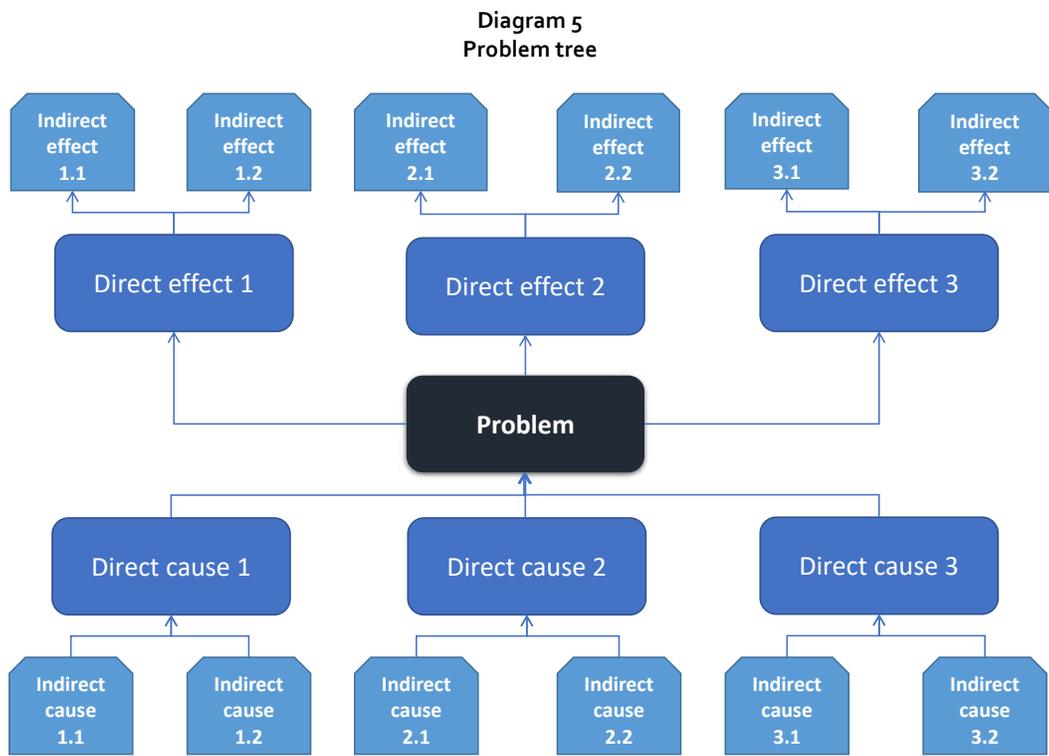
We ought to consider reality from the perspective of a rhizomatic organization of knowledge; however, this tool helps to organize our knowledge of the reality of the problems that we want to address.

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Activities and expected results:

Partial output 3

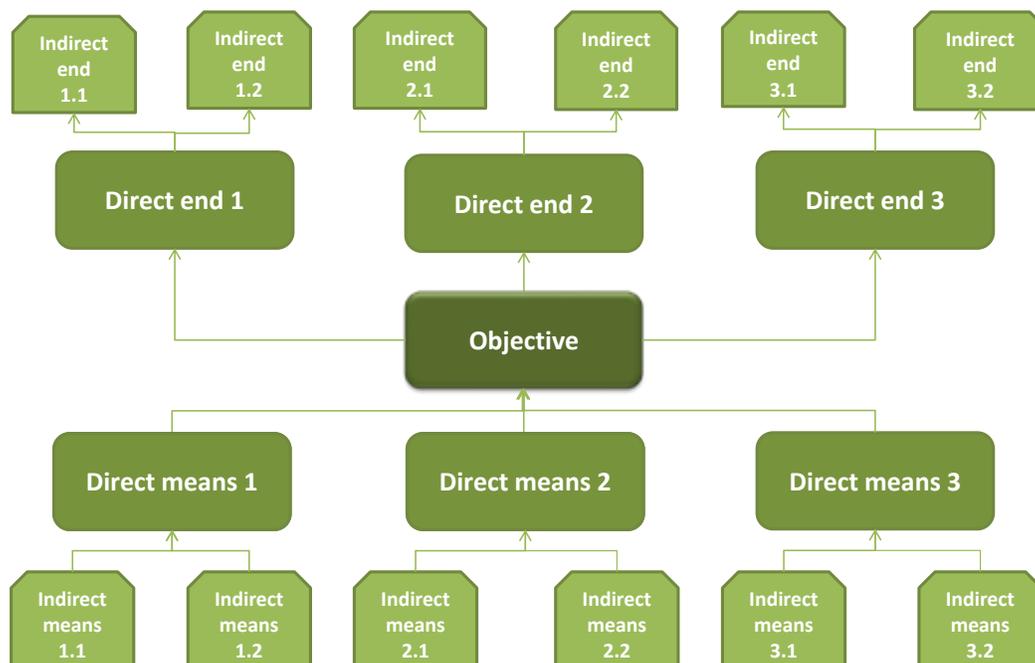
- Problem and objective trees
- (i) It is recommended that the **problem tree** (see diagram 5) be developed on a blackboard or flip chart and then converted to digital format.



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

- (ii) Once the problem tree is completed and agreed upon by the group, draw the **objective tree** (see diagram 6) by transforming the situations presented in the problem tree into positive ones.

Diagram 6
Objective tree



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

The means in the objectives tree are made up of the number of projects or programmes that we are considering in order to achieve the core objective and thus overcome the core problem identified.

- (iii) Once the objective tree has been constructed, a matrix is created containing the core objective identified and its possible links to one, some or all the SDGs and their respective targets (see table 1). Linking to the SDGs and their targets can give coherence to the strategies that will later be developed as proposals to enhance the territory’s development. If more than one problem tree is constructed, an equal number of objective trees should be developed.

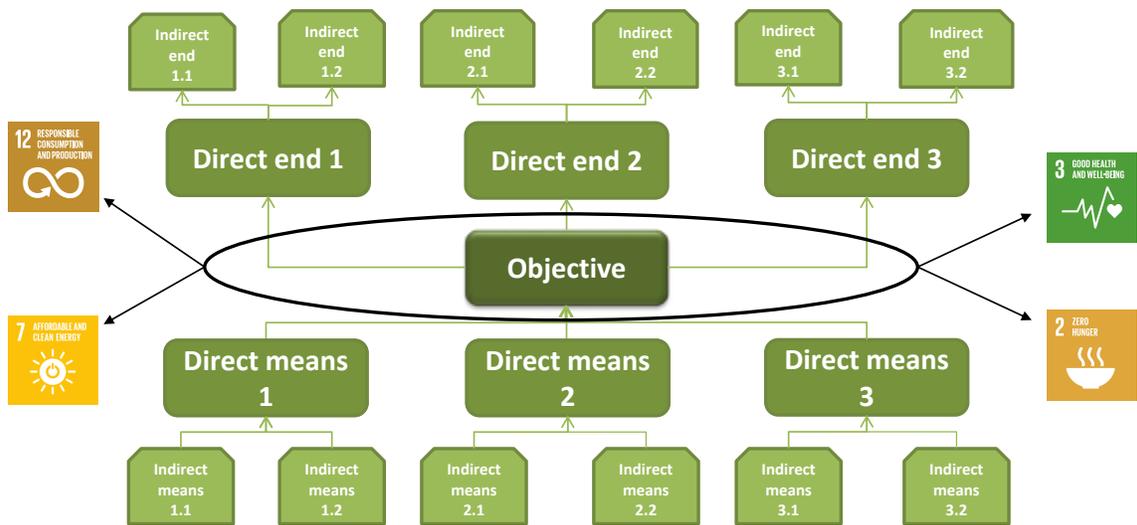
Table 1
Core objective-SDG relationship

SDG	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Core objective	1.2	2.4	3.2														
objective	1.3	2.5	3.3														

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

- (iv) The objective tree is linked to the SDGs and the chosen targets.

Diagram 7
Objective tree and the SDGs



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

4. Workshop IV: Strategies for the territory

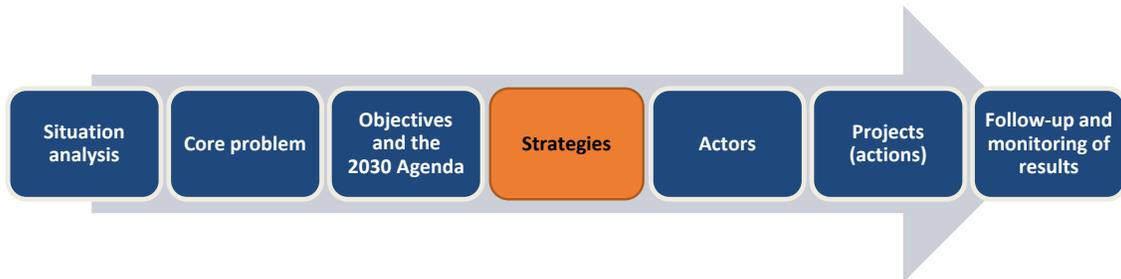
Objective:

Conduct a strengths, weaknesses, opportunities and threats (SWOT) analysis of the territory to establish strategies for achieving the core objective(s) identified in the previous workshop.

Inputs:

Core objective(s) identified in the previous workshop and their link to the SDGs and their respective targets; supporting concept notes.

Diagram 8
Strategies for the territory



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Box 4
Strategic thinking

The drafting of a strategy is often confused with the actions.

A strategy always entails choosing one path and discarding others. It is an option in itself and behind it, explicitly or implicitly, stands a paradigm, an idea of the world.

Strategies do not implement themselves on their own; they need the actors.

To think strategically is to think of ways to solve needs according to the possibilities.

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Expected results:

Partial output 4

- Intervention strategies and linkage to SDG targets, directly related to the core problem and the core objective (see tables 2 and 5).

Table 2
Examples of strategies

Coverage strategies and their scope in service delivery	Universal coverage Targeted coverage Diversified coverage
Economic strategies	Investment and expense containment Investment and expense expansion
Management strategies	Services outsourcing Policy coordination Strengthening the social fabric – co-management

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Activities:

- (i) Identify the territory's strengths and weaknesses (internal analysis of the territory) that could impact achievement of the core objective, based on the potential and limitations confirmed in the situation analysis. Make a general list, then select three of the items and place them in the SWOT matrix provided below (see table 3).
- (ii) Identify the opportunities and threats in the external context that could impact achievement of the core objective. Make a general list, then select three of the items and place them in the SWOT matrix provided below (see table 3).
- (iii) Define strategies for achieving the objective based on an interrelated analysis of strengths, weaknesses, opportunities and threats.

Table 3
SWOT Matrix

Objective (problem tree centre)	Strengths (internal) (1)..... (2)..... (n).....	Weaknesses (internal) (1)..... (2)..... (n).....
Opportunities (external) (1)..... (2)..... (n).....	Potentialities Strategies for harnessing opportunities and strengths	Challenges Strategies for overcoming weaknesses by harnessing of opportunities
Threats (external) (1)..... (2)..... (n).....	Risks Strategies for overcoming threats by harnessing strengths	Limitations Strategies for neutralizing threats

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

In that regard, strategies should be formulated that seek to:

- take advantage of opportunities and strengths;
- overcome weaknesses by taking advantage of opportunities;
- overcome threats by building on strengths; and
- neutralize the threats.

Note 1. It is suggested to focus on the potentialities in order to draft at least two strategies in that quadrant.

Note 2. From the other intersections develop a strategy for each one.

In completing the matrix, consider the concepts set out in table 4.

Table 4
SWOT matrix concepts

Concepts	Definition
Strengths	Positive internal conditions of the territory that contribute to its development and to the achievement of the objective
Weaknesses	Internal conditions of the territory that may hinder the territory's development and the achievement of the objective
Opportunities	Conditions and variables external to the territory that contribute to its development and to the achievement of the objective
Threats	Conditions and variables external to the territory that may hinder its development and the achievement of the objective
Potentialities	From the combination of opportunities and strengths emerge the greatest potentialities, which can contribute to the territory's development
Challenges	From the combination of weaknesses and opportunities arise challenges that must be addressed in order to reach the targets set
Risks	From the combination of threats and strengths arise risks that must be considered in order to meet the objective
Limitations	This is the worst-case scenario. From the combination of threats and weaknesses arise limitations that if not considered can generate disruptions that compromise the improvement of the population's quality of life

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Table 5
Strategies and linkage to SDG targets

Strategies	SDGs	Target
1.		
2.		
3.		

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

5. Workshop V: Actors map

Objective:

To analyse the strategies defined in the previous workshop and identify relevant actors for implementing those strategies. It is important to consider the power and influence of the actors, as well as their position regarding the implementation of these strategies (opposed, indifferent and in favour).

Inputs:

Strategies defined in the previous workshop

Diagram 9
Actors map



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Expected results:

Partial output 5

- An actors map to chart possible institutional linkages that should be generated in order to carry out the strategies, as well as to enable consideration of the viability of achieving the SDG targets linked to these strategies.

Activities:

- **Identification of actors and actors map**

For the strategies to succeed, it is essential to think about which actors there are, as well as their positions and the powers they have—or not—to implement these strategies and achieve the targets.

- (i) Complete table 6 by listing the actors and their positions. Consider the power that each actor has, drawing distinctions between power to make decisions, influence public opinion or organize resistance movements.

Table 6
Actor matrix

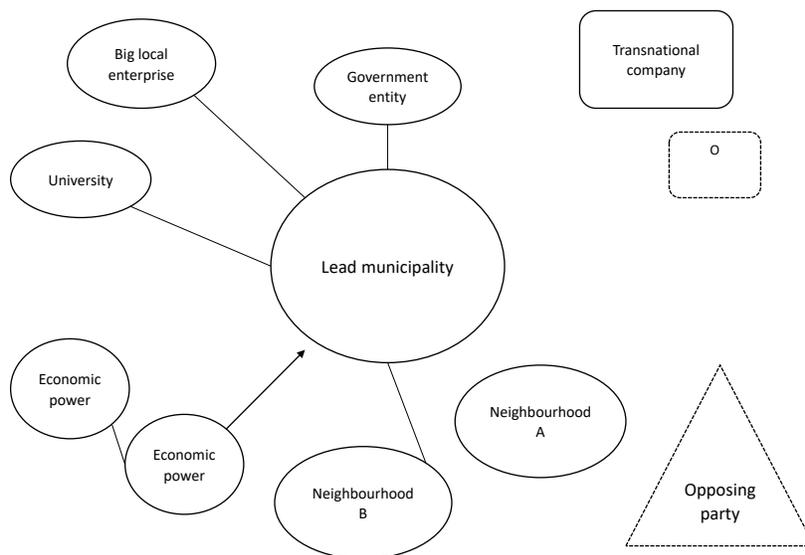
Power to	In favour	Opposed	Indifferent
Make decisions			
Influence public opinion			
Generate resistance movements			

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

(ii) Draw an actors map, taking into account the information in table 6.

Each group should design an actors map, positioning itself as the central actor (governing body of the territory responsible for executing the strategies described in the potentialities) and establishing the links with other relevant actors who influence and have power to implement the strategy or strategies.

Diagram 10
Map of allied, neutral and opposing local actors



Source: Inter-American Institute for Social Development (INDES), "Gestión integral del desarrollo económico territorial. Metodología para el mapeo de actores. Module V: Módulo V: Gobierno subnacional y alianzas públicos-privadas-BID-INDES", September 2011, unpublished.

The symbols set out in table 7 could be used.

Table 7
Actors map symbols

□	Actors in favour of forming partnerships
△	Actors opposed to forming partnerships
○	Actors neutral about forming partnerships

Source: Inter-American Institute for Social Development (INDES), "Gestión integral del desarrollo económico territorial. Metodología para el mapeo de actores. Module V: Gobierno subnacional y alianzas públicos-privadas-BID-INDES", September 2011, unpublished.

Once the strategies have been defined and the actors who influence them analysed, the next task is to think of actions that, depending on their scope, constitute the programmes and projects that will serve as inputs for implementing the strategies and the overarching aim of achieving the targets.

6. Workshop VI: Project proposals

Objective:

Tie the knowledge yielded previously by Workshops I to V into concrete actions organized in a project structure with a logframe matrix.

Inputs:

Logical framework matrix; information on a project in the territory that was selected in the earlier workshops.

Diagram 11
Project development



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Expected results:

Partial output 6

- Logframe matrix applied to a selected project (see table 8).

Table 8
Logframe matrix

	Objectives	Indicators	Means of verification	Assumptions
End	Why is the project important for the beneficiaries and society? Describe the expected long-term impact of the project (While the project makes a significant impact, it is not always sufficient to achieve the desired outcome)	They should measure the change attributable to the project; they should be obtained at reasonable cost and preferably from existing data sources. They should specify quantity, quality and time	Identify where the implementer or evaluator can obtain information about the indicators. Existing information sources should be identified	The environmental, financial, institutional, social, political, climate or other risks that may cause the project to fail. Assumptions are identified for each stage. Risk is expressed as an assumption that must be met in order to move to the next level in the hierarchy of objectives (from the bottom up)

	Objectives	Indicators	Means of verification	Assumptions
Purpose	Why do the beneficiaries need the project? Describe the direct effect, the immediate expected result once the project is implemented. A single purpose should be defined	They should measure the change attributable to the project; they should be obtained at reasonable cost and preferably from existing data sources. They should specify quantity, quality and time	Ditto	Ditto
Components	What will the project deliver? These are the projected results for the purpose to be met. For example, others completed, training completed	Concise descriptions of the components supplied by the project. They should specify quantity, quality and time	Ditto	Ditto
Activities	What will be done? Activities to be carried out to achieve the expected results (components) The activities described in this framework should be further detailed subsequently in a chronological schedule for them	The activity indicators are a prerequisite for each one	Ditto	Ditto

Source: E. Ortegón, J. Pacheco and A. Prieto, "Metodología del marco lógico para la planificación, el seguimiento y la evaluación de proyectos y programas", *Manuales series*, No. 42 (LC/L.2350-P), Santiago, Economic Commission for Latin America and the Caribbean (ECLAC), 2005.

Activities:

Project template

- (i) **Project name:** It should be a short, precise name that includes the thematic area of the project and its geographical scope. The title should arise directly from the definition of the purpose described in the logframe matrix.

- (ii) **Project justification:** This section contains a narrative summary of the justification for the project and presents the core problem it seeks to solve. This narrative is the interpretation of the territory's timeline the problem tree and the objective tree.

- (iii) **Beneficiary scope:** Who and how many people will benefit from the implementation of the project?

- (iv) **Identification of stakeholders:** Which actors are in favour of the project and could be involved as partners or allies?

- (v) **Project logframe matrix:** In this section the logical framework matrix methodology is applied with the key information to develop the project. The matrix with 4 rows and 4 columns expresses the narrative summary of the objectives, each with its indicators, means of verification and assumptions.

Comments on the matrix

Objectives: The objectives in this methodology are achievements, successes, and targets met. They should be realistic, effective, coherent and quantifiable.

Indicators: The quantitative and qualitative specification to measure the achievement of an objective, as collectively accepted by the project stakeholders as being appropriate to achieve the corresponding objective. They define operationally what is set down in the narrative summary of the objectives. A minimum of indicators should be used to properly specify an objective. Indicators should cover intermediate and final targets. They should be expressed in: quantity —how much we want to produce or achieve; quality – to establish a standard against which to compare; and time— to establish when the goal will be achieved. Indicators must be specific, achievable, measurable, relevant, time-bound (SMART) and independent, the last meaning that a component indicator cannot be used for the purpose, or activities as component indicators.

Means of verification: exact sources must be identified, taking into account the availability of the information, updating, disaggregation and required frequency. If the information is important but not available, it should be incorporated into the activities.

Assumptions: critical factors that are beyond the control of the project management. Assumptions are established based on lessons learned, stakeholder simulation or analytical instruments such as the SWOT analysis.⁴ It should always be borne in mind that the factor must be external to the project and that it is important; its probability of occurrence must be identified, and if that probability is low, the possibility should be considered of redesigning or adjusting the project.

7. Workshop VII: Results-based project management and the 2030 Agenda

Objective:

Incorporate into the logframe matrix an innovative approach aimed at achieving the SDGs.

Input:

The 2030 Agenda for Sustainable Development

⁴ Strengths, weaknesses, opportunities and threats.

Diagram 12
Follow-up and monitoring of results



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Expected results:

Partial output 7

- Integrated logframe matrix (see table 9)

Table 9
Integrated logframe matrix

Expected results	Indicators	Means of verification	Risks/assumptions	Stakeholders	Responsible
Impact					

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Activities:

Take 1 result or component from the logframe matrix and complete the Integrated Result Matrix (IRM).

8. Workshop VIII: Project management indicators

Objective:

To review the quality of the indicators by meeting the criteria of a SMART indicator.

Input:

IRM, Descriptive list of SMART indicators

Expected results:

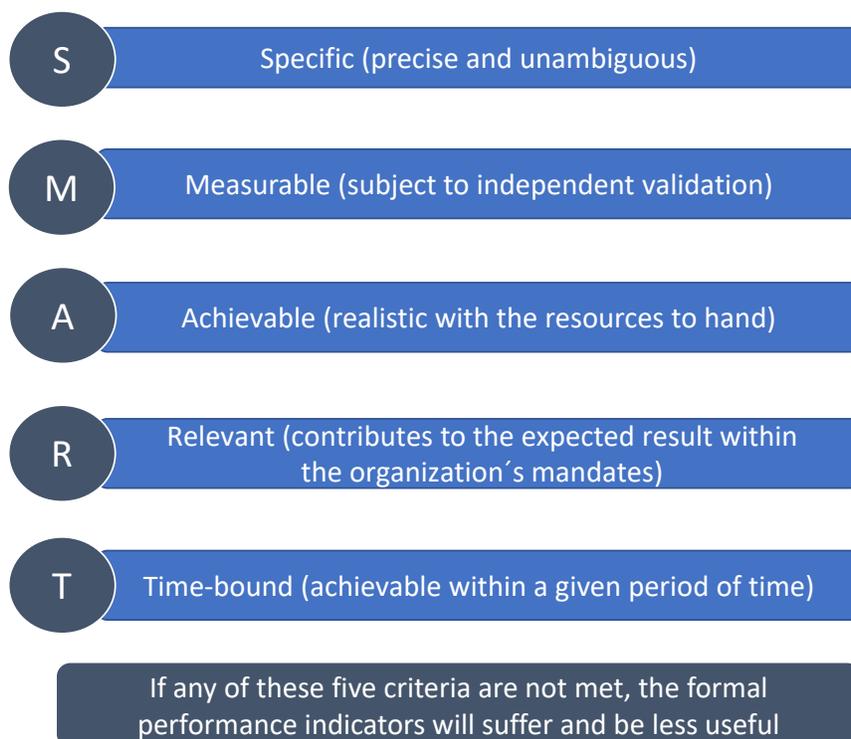
Partial output 8

- Validation or correction of the indicator(s)

Activities:

Review the indicator(s) according to the SMART performance key (see diagram 13).

Diagram 13
SMART key performance indicators



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Table 10
Indicator check

Indicator 1 yes or no	Comment	Indicator 2 yes or no	Comment
S			
M			
A			
R			
T			

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

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The 2030 Agenda for Sustainable Development provides a framework of State policies for each of the 193 signatory countries. As of mid-2019, Latin American and Caribbean countries had submitted a total of 22 reports on national progress in the implementation of the 2030 Agenda.

However, support for the establishment and implementation of the 2030 Agenda in each of the region's territories—be they municipalities, subnational governments, border areas, or other territorial units—is also important.

In this context, the main purpose of this document is to serve as a methodological guide for comprehensive planning in a territory, with a view to achieving the 2030 Agenda.

Thanks to its accessible format for those responsible for the development and implementation of planning processes in a territory, this guide seeks to ensure that the Goals and targets of the 2030 Agenda for Sustainable Development will be realized in all the territories of the region.

