

MILIEUKONTAKT
OOST-EUROPA



Project Management

Content of the Module

Proposed Agenda

Objectives of the Module

Introduction

What is required for successful Project Management

Process of project management

Analysis of the situation

Aims and Objectives

Strategy and Methodology

Planning

- Why do we plan?
- Key managerial planning issues
- Time frame of planned activities

Implementing the project

Monitoring and Evaluation

Reporting

- Narrative Report
- Financial Reports

Proposed Agenda

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|-------------------|---|---------------|
| 15 minutes | Welcome and agenda review | (#1) |
| 15 minutes | Opening Exercise | (#2) |
| 15 minutes | Introduction and overview | (#3) |
| 15 minutes | Project Management Introduction | |
| | • What is required for successful project management; | (#4) |
| | ❖ Large group discussion | (#5) |
| 60 minutes | Process of project management 1 | |
| | • Analysis of the situation | (#6) |
| | ❖ Small group session | (#7) |
| | ❖ Large group discussion | (#8) |
| 60 minutes | Process of project management 2 | |
| | • Aims and objectives | (#9) |
| | ❖ Small group session | (#10) |
| | ❖ Large group discussion | (#11) |
| 60 minutes | Process of project management 3 | |
| | • Planning | (#12) |
| | ❖ Small group session | (#13) |
| | ❖ Large group discussion | (#14) |
| 60 minutes | Process of project management 4 | |
| | • Implementing the project | (#15) |
| | ❖ Small group session | (#16) |
| | ❖ Large group discussion | (#17) |
| 60 minutes | Process of project management 5 | |
| | • Monitoring | (#18) |
| | • Reporting | (#19) |
| | ❖ Small group session | (#20) |
| | ❖ Large group discussion | (#21) |
| 20 minutes | Workshop summary and evaluation | (#22) |

Objectives of Module:

- To inform participants about the importance of successful project management.
- To give participants an opportunity to experience the process of project management.
- To increase participants' understanding of different aspects and elements of the project management process.
- To provide participants with tools to use in managing their own projects in their organizations.

INTRODUCTION

This Chapter of the Trainers Manual is about the basic elements and steps of project cycle management as a crucial element in the successful operation of NGOs. This will aid NGOs in planning and organizing projects, mobilizing people, and coordinating activities.

There are many definitions of project management that explain that it is a relatively simple tool that can help us to establish the factors that affect the success of the operation, or that project management is the process of planning, organizing, and mobilizing people and resources for a given purpose, or that project it is the process undertaken by one or more individuals to coordinate the activities of others, etc.

This Chapter is designed to serve to the trainer as a guide to the transfer of knowledge, skills and experience, in order to lead the group in the preparation of a successful project management plan.

The Chapter includes: general information on project management; analysis of the situation for developing a good plan; developing the aims and objectives of the project; developing a management plan; advice for good implementation and reporting. It also includes guidelines and tools in the form of figures at the end of the chapter.

Training Aids

- Flipcharts and flipchart stand;
- Markers;
- Overhead projector and screen;
- Transparencies;
- A4 writing paper;
- Tape;
- Training notes.

Methods of Work

- Presentation;
- Questions and answers;
- Small group session;

- Large group discussion;
- Games and exercises.

Training design

Time	Technique	Trainer Notes
15 min. #1	Presentation Individual presentation Q&A	<p>1. Welcome and agenda review: (instructions) Welcome the participants and thank them for coming. State the reasons why the decision was made to have the participants in the workshop. Introduce yourself and provide some biographical description, which establishes the trainer’s credentials. Personalize the formal introduction. Ask each participant to introduce him-/herself, learning something new about where they work, why they work for the organization and/or personal interests (or use games No. ### from the “Games and Exercises” Chapter in this manual). The goal is to facilitate a more personal understanding of who the individuals are in terms of their interests, motivation, and background.</p> <p>Refer to the objectives of the workshop. Ask the participants what their expectations of the workshop are. Point out how their expectations fit within the objectives.</p> <p>Go over the agenda and announce break times. Point out locations of facilities participants might use during the workshop. Refer in general to the roles of the trainer and the participants. Review the norms of behavior with participants.</p>
15 min. #2	Exercise	2. Opening exercise: (instructions) Refer to exercise # from the “Games and Exercises” Chapter in this manual.
15 min. #3	Presentation	<p>3. Transition: (instructions) Transition to the introduction of the workshop topic by giving general information on project management and what efforts are necessary to plan, organize and mobilize people and resources for achieving a certain goal.</p> <p>(content) The basic purpose for initiating a project is to accomplish goals. The reason for organizing the task as a project is to focus the responsibility and authority for the accomplishment of the goals on an individual or small group.</p> <p>Actual experience with project management indicates that the majority of organizations should make a better use of its previous experience, exercise better control, and be more customer-needs oriented.</p> <p>There are many definitions of project management that explain that it is a relatively simple tool that can help us to establish the factors that affect the success of operation, or project management is the process of planning, organizing, and mobilizing people and resources for a given purpose, or that it is the process undertaken by one or more individuals to coordinate the activities of others, etc.</p> <p>One explanation of project management that is useful for environmental NGOs is that it is crucial for the successful operation of</p>

NGOs if they want to plan and organize their projects, mobilize people, and coordinate activities. Project planning also contributes to the successful implementation of the NGO's annual program.

5 min. #4 Presentation **4. Project management introduction: (instructions)** Introduce the topic by stating the skills and factors required in order to have a successful project. You can use flipchart paper or transparencies to support major talking points in your presentation.

(content) Technical skills, human skills, computer skills, and conceptual skills: all are for successful project management. The combination of skills required depends on the level of management and the kind of projects the NGO needs to manage.

Success of the project depends on several factors:

- Proper planning;
- Project team participation in planning;
- Project addresses real problems;
- The organizational structure suits the project team;
- The target group is involved from the start;
- A competent and motivated project team;
- Other factors.

10 min. #5 Large group discussion **5. Project management introduction discussion: (instructions)** Ask the participants to comment on what they have learned on the subject and to share any personal experiences, if any. Open the floor for questions, comments and discussion.

15 min. #6 Presentation Q&A **6. Analysis of the situation: (instructions)** Begin your presentation by giving an overview of the process of project management. Briefly explain what questions should be answered in each step of the process. Refer to Figure No.1 (given below after the training design section), prepared on a transparency or a flipchart paper.

(content) There are many suggested processes for successful project management. One of the processes that is easily applicable for NGOs is the following: (refer to Figure No.1)

(instructions) Continue talking about needs analysis and what questions this should answer. Refer to Figure No.2 (given below after the training design section), prepared on a transparency or a flip chart paper. Ask for questions at the end of presentation.

(content) Needs analysis reminds us that no matter how wonderful our ideas may be, how important and crucial our role may seem, nothing makes sense if it is not needed. (refer to Figure No.2) Needs analysis should be realized by answering the following questions:

- Why this project is needed? Are the communities' needs reflected in it?
- What are the opportunities for the project?

- Does the community want the project? Is someone else doing it?
- What is innovative in it?
- What is the project going to change?
- Do the project involve the broader public and key persons?

30 min. #7	Small group session	7. Analysis of the situation exercise: (instructions) Divide participants in groups of 2 to 4 people, depending on the size of the whole group. Provide enough space for groups to work without interference. Participants in each group can use A4 writing paper or a flipchart to write on. Ask participants in each group to select a project idea and answer all the questions that were mentioned in the presentation by generating needs analysis ideas.
15 min. #8	Large group discussion	8. Analysis of the situation discussion: (instructions) Ask each group to present what they have written on the subject. Open the floor for questions, comments and discussion.
15 min. #9	Presentation Q&A	9. Aims and objectives: (instructions) Refer in your presentation to the aims and objectives of a project and how to define them according to the SMART principle. Also, link that with how one chooses strategies and methodologies, based on aims and objectives. You can use flipchart paper or transparencies to support major talking points in your presentation. Ask for questions at the end of the presentation.

(content) From the need analysis, we know why this project is important. Now is it time to identify what your project is for. What should the project achieve? Why does the project exist? In this phase, we have to decide what the aims of the project are.

The aims do not include dates, methods, or the activities of the project; they will be dealt with in other sections.

The aims should not change during the project. Changing the aims means changing the project as a whole.

The most important thing about setting the objectives of the project is that they have to be SMART:

Specific

Measurable

Achievable

Realistic

Time-bound

The more abstract the objectives are, the more difficult it is to measure performance.

Project managers need to discuss the objectives with the project team, the target group, and project partners. Objectives must be understandable and acceptable to those who will help achieving them.

The choice of one or more strategies will usually be made after the project aims and objectives have been decided upon.

Strategy identification involves:

- a. Identification of the different possible ways to achieve the project

aims and objectives.

- b. Determining that your target group understands the process you propose to them.

The methodology should ensure that results are available at the best moment.

The methodologies have to be concerned with a global approach and concepts. The working methods are the way that we are going to do the activities to pursue concrete objectives or steps. It is very important that other people or partners need to understand the methodology and the strategy of the project.

The most important elements to take into account when we talk about methodology are:

Coherence. The different components of the project have to make sense as a whole, and to respect the framework provided by aims and objectives.

Consistency. Despite the flexibility that makes the project a “living” entity, what we do has to be consistent with what we stand for or what we state as being our values.

Effectiveness. Whatever you decide to undertake in the form of concrete activities must strive for effectiveness.

30 min. #10	Small group session	10. Aims and objectives exercise: (instructions) Divide participants in the same groups of 2 to 4 people, as in the previous small group session. Provide enough space for groups to work without interference. Participants in each group can use A4 writing paper or a flipchart to write on. Ask participants in each group to work on the selected project idea and write down aims and objectives to be achieved.
15 min. #11	Large group discussion	11. Aims and objectives discussion: (instructions) Ask each group to present what they have written on the subject. Open the floor for questions, comments and discussion.
15 min. #12	Presentation Q&A	12. Planning: (instructions) Continue your presentation by giving an overview of why we need to plan. Briefly explain what the key managerial planning issues are and what questions should be answered for each of those issues. Refer to Figure No.3 (given below after the training design section), prepared on a transparency or flipchart paper. Briefly talk about a time frame of planned activities. Refer to Figure No.4 (given below after the training design section), prepared on a transparency or a flipchart. You can use flipchart paper or transparencies to support major talking points in your presentation. Ask for questions at the end of presentation. (content) Why do we plan? <ul style="list-style-type: none">▪ Planning enables the NGO to accomplish goals rather than to accept the future.▪ By having a plan, the organization commits itself to “making things happen”.▪ You have a framework and clearly defined direction that guides and supports the management of the organization.

- Planning provides resources for activities involving NGO members from all NGO teams.
- Improves the quality of the plans; good suggestions can come from different levels of the organization.
- Planning has positive effects on NGO functioning.

Key managerial Planning Issues (refer to Figure No.3)

Time frame of planned activities (refer to Figure No.4)

30 min. #13	Small group session	13. Planning exercise: (instructions) Divide participants in the same groups of 2 to 4 people, as in the previous small group session. Provide enough space for groups to work without interference. Participants in each group can use A4 writing paper or a flipchart to write on. Ask the participants in each group to work on the selected project idea and write down a management plan with a time frame for activity implementation.
15 min. #14	Large group discussion	14. Planning discussion: (instructions) Ask each group to present what they have written on the subject. Open the floor for questions, comments and discussion.
15 min. #15	Presentation Q&A	15. Implementing the project: (instructions) In your further presentation, provide information on how the implementation should be managed and that indicators should be used to monitor and evaluate the progress of the project. Refer to Figure No.5 (given below after the training design section), prepared on a transparency or a flipchart paper. You can use flipchart paper or transparencies to support major talking points in your presentation. Ask for questions at the end of presentation.

(content) After planning, its time to convert the Project Plan into an operating timetable. The scheduling function is more important than the ongoing operations themselves. A detailed schedule can also serve as a key input in establishing the monitoring and control systems for the project. Typically, the schedule is based on the previously determined action plan and/or work breakdown structure.

- It is a consistent framework for planning, scheduling, monitoring, and controlling the project.
- It denotes the times when specific individuals must be available for work on a given task.
- It determines the dates on which tasks may be started - or must be started if the project is to stay on schedule.
- It illustrates which tasks must be coordinated to avoid resource or timing conflicts.

It is useful to have a chart with information about the project on the management table. (refer to Figure No.5)

30 min. #16	Small group session	16. Implementing the project exercise: (instructions) Divide participants in the same groups of 2 to 4 people, as in the previous small group session. Provide enough space for groups to work without
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interference. Participants in each group can use A4 writing paper or a flipchart to write on. Ask the participants in each group to work on the selected project idea and write down an implementation plan with the resources needed.

15 min. #17 Large group discussion **17. Implementing the project discussion: (instructions)** Ask each group to present what they have written on the subject. Open the floor for questions, comments and discussion.

5 min. #18 **18. Monitoring: (instructions)** Continue your presentation by giving an overview of why we need to monitor the project.

(content) Why do we monitor the projects?

- To measure progress;
- To collect information;
- To look at costs and benefits;
- To solve problems (not to criticize or to blame anyone);

To help the project team see where they are going and if they need to make any changes.

15 min. #19 Presentation Q&A **19. Reporting: (instructions)** Provide information in your presentation about why reporting is important, why it is used, and how it can be used. Explain the elements of narrative and financial reports. Link this with what kind of follow-up can be planned using the report information. You can use flipchart paper or transparencies to support major talking points in your presentation. Ask for questions at the end of presentation.

(content) Reporting is a form of monitoring the project. Reporting is a tool that keeps the donor informed about the progress of the project. Reporting allows the donor to assess the way the project is being managed during implementation and in the light of the agreements. The donor of the project has to be informed about the progress of the project, compared to the original plan.

Reporting not only keeps the donor informed, but also helps project management to reflect on the implementation of the project and to suggest corrective actions if needed. Progress reports should be an analysis of project activities, including financial expenditures for the past months with regard to the objectives and output structure of the project document and budget. Reporting involves early identification and analysis of factors affecting the planned progress and achievement of the project's aims, and being aware of any additional measures taken by the project management to implement the agreement made.

Most of the time, reporting is also related to liquidity planning and fund requests. The financial report gives an indication of expenditures during the reporting period and provides a plan for expenses during the coming period. Based on this, the fund flow of the project can be established and requests for funds can be forwarded to the donor.

The following information should be addressed in a *narrative report*.

1. Introduction. Significant developments in the reporting period.
2. Objectives and planned activities for the period.

3. Were the objectives and the activities of the project achieved?
4. Did you meet any bottlenecks and/or problems?
(If so, why? What was done to deal with them?)
5. Were you able to carry out the activities according to schedule?
(If not, why? What was done to adapt the activities?)
6. Has the target group been reached?
7. Copies or samples of every material produced during the project implementation, like posters, leaflets, study reports, newspaper articles, publications, training lessons and programmes, etc.
8. Objectives and planned activities for the next period.
9. Specific recommendations for any action necessary to ensure that the project achieves its objectives.

Financial reports should give an overview of expenditures that have occurred during the reporting period. These expenditures should be shown in relation to the plan. In addition, an explanation should be given about the deviations from the budget. The financial report should clearly and accurately show the expenditures and use of funds during the reporting period. The presentation should include a clear breakdown of costs by budget lines as used in the approved budget. Financial reports should address the following information:

- An account of the progress made towards the achievement of the project objective.
- An overview of expenditures during the reporting period.
- An explanation of any deviation from the budget and links to actual progress.
- An overview of the budget required for financial activities and expected output over the next 12 months.

Important:

- Progress and financial reports are interlinked.

Project management should make sure that progress and financial reports are combined and that they are always submitted at the same time.

30 min. #20	Small group session	20. Reporting exercise (instructions) Divide participants in the same groups of 2 to 4 people, as in the previous small group session. Provide enough space for groups to work without interference. Participants in each group can use A4 writing paper or a flipchart to write on. Ask participants in each group to work on the selected project idea and write down the key reporting information.
15 min. #20	Large group discussion	21. Reporting discussion (instructions) Ask each group to present what they have written on the subject. Open the floor for questions, comments and discussion.
20 min. #22	Presentation Q&A	22. Workshop summary and evaluation: (instructions) Present a summary of the whole workshop and the key learning points. Ask participants to share verbally action steps they will take as an immediate follow-up to the workshop. Tell the group how the trainer can support them in achieving their follow-up plans.

Thank the group for their participation and compliment them on holding the workshop and dedicating themselves to the growth of their organization.

Ask the participants to fill in the evaluation form, and distribute the forms (use Evaluation Form No.1 or 2 from “Evaluation” Chapter in this manual). Thank them for completing it before they leave.

Process of project management

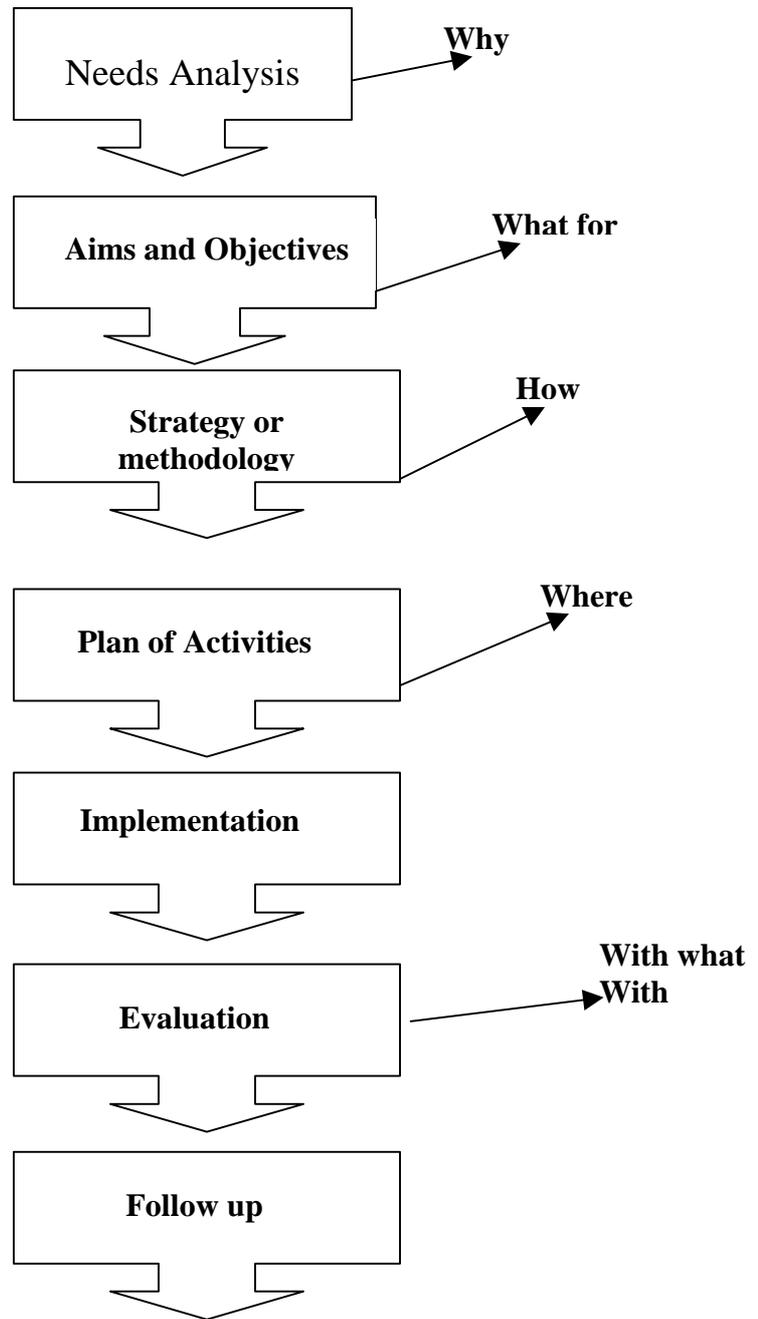


Figure No.1

ANALYSIS OF THE SITUATION

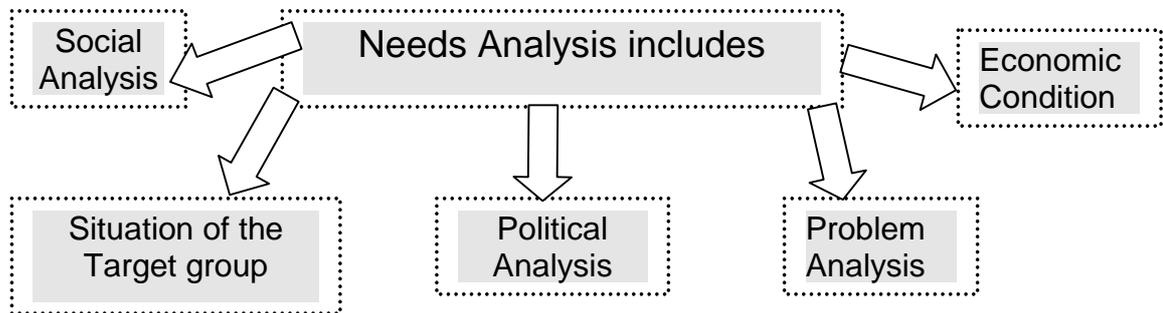


Figure No.2

PLANNING
Key managerial Planning Issues

Asking the right question for each element of the plan is critical	Planning element	Key managerial Decision
	Objectives	<ol style="list-style-type: none"> 1. What objectives will be sought? 2. What is the relative importance of each objective? 3. What are the relationships among the objectives? 4. When should each objective be achieved? 5. How can each objective be measured? 6. What person or organizational unit should be accountable for achieving the objective?
	Action	<ol style="list-style-type: none"> 1. What important actions bear on the successful achievement of objectives? 2. What information exists regarding each action? 3. What is the appropriate technique for forecasting the future state of each important action? 4. What person or organizational unit should be accountable for the action?
	Resources	<ol style="list-style-type: none"> 1. What resources should be included in the plan? 2. What are the interrelationships among the various resources? 3. What budgeting technique should be used? 4. Which person or organizational unit should be accountable for the preparation of the budget?
	Implementation	<ol style="list-style-type: none"> 1. Can the plan be implemented through authority? 2. What policy statements are necessary to implement the overall plan? 3. To what extent are the policy statements comprehensive, flexible, co-coordinative, ethical, and clearly written? 4. Who or what organizational units would be affected by the policy statements?

Figure No.3

TIME FRAME OF PLANNED ACTIVITIES

Day Activity	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Activity A														
Activity B														
Activity C														
Activity D														
Activity E														
Activity F														

Figure No.4

IMPLEMENTING THE PROJECT

What will be done	How	By Whom	When	Where	Results	Indicators	Budget foreseen

Figure No.5