

Project Management

Time	Event	Content
1 hour & 30 min	<i>Session 21</i> Delivery Skills	<ul style="list-style-type: none"> • Five key components of good project delivery • Introduction to tools for successful project delivery • Assessment of project management, delivery skills (Group discussion)
1 hour & 45 min	<i>Session 22</i> Monitoring and Measuring Impact	<ul style="list-style-type: none"> • Involving project partners and beneficiaries in the monitoring and evaluation (Group discussion) • Resolving problems encountered in monitoring (Group discussion) • How do you measure impact? (Group discussion)
1 hour	<i>Session 23</i> Reporting	<ul style="list-style-type: none"> • Evaluation by Logical Frameworks • Guidelines for report preparation • Communication with the partners, beneficiaries and donors • Report formats • Dissemination
1 hour	<i>Session 24</i> Reflection Next Steps	<ul style="list-style-type: none"> • What are you going to do after the workshop, how are you going to share your new skills? (Sharing individual plans) • Reviewing training objectives and overview of all sessions • Feedback and workshop evaluation
15 min	Closing	<ul style="list-style-type: none"> • Distribution of Certificates • Closing

Improving Project Management & Delivery Skills

Objectives

By the end of Day 5 you will be able to:

- discuss what skills you need for effective project management and delivery
- identify tools to enhance your key project management and delivery skills, especially monitoring and evaluation and report writing for your own projects

Activities

Session 21 – Delivery Skills

Activity 31: 'What do we need to do to achieve a successful project?'

Activity 32: Outline what you found effective and useful in the delivery of your projects?'

Activity 33: Select and describe project management tools

Activity 34: Improve your delivery and management skills

Session 22 – Monitoring and Measuring Impact

Activities before launching the project

Activity 35: What do you do in these situations?

Session 23 – Reporting

Activity 36: Analyse a project report

Session 24 – Next Steps, Closing

Activity 37: Develop your actions after the workshop

Activity 38: Reflect on the goals, objectives and your expectations and achievements

Activity 39: Complete and submit your workshop evaluation form

Resources

- Your draft project plan
- Proposal Assessment
- Workshop Evaluation Form (Handed out at the workshop)

■ Session 21

Delivery Skills

Objectives

By the end of the session you will

- understand the components of project implementation
- be introduced to examples of tools that will assist in project management/implementation
- identify areas you need to improve
- identify further training needs if necessary

How to be a Great Project Manager?

What skills and characteristics do you need?

The project manager is a key member of the project team. The character and skills of this person can make the difference between a successful project and a failure between an adequate project and a brilliant one. Do you think you have the skills and characteristics for the job?

Surveys in project management journals consistently list the following characteristics as vital for effective project management:

1. Leadership by example
2. Visionary
3. Technically competent
4. Decisive
5. Good communicator
6. Good motivator
7. Capable of standing up to senior management when necessary
8. Supportive of team members
9. Encourages new ideas

The following key characteristics are identified for a great project manager (modified for relevance):

1. Interpersonal skills. The ability to manage people is vital. Project managers will ultimately be responsible for co-ordinating the work of the project team. It's crucial that they have the interpersonal and leadership skills to direct team members and keep them motivated and on track. In cross cultural projects e.g. when the donor is from another country, the ability to be aware of and address cultural differences can be very important. The project manager also needs to be able to smoothly navigate through the tricky politics within and between the participating organizations be they those of stakeholders or partners. Keeping donors informed, involved as appropriate and satisfied also requires good diplomacy skills.

2. Organizational skills. This key characteristic of great project managers is absolutely critical to keep projects on schedule and budget. The ability to allocate resources, prioritize tasks, and keep track of the budget will ensure quality and ensure the project's success. Vision is needed to come up with innovative solutions, but without the discipline of organization, the vision will become an empty dream.

3. Communication skills. The project manager is the main communication link between the donor and the project team, the donor and the beneficiary and the team and the beneficiary. Her or his ability to clearly communicate with members of all groups is essential. She/he must be able to clearly communicate project objectives, challenges or problems, and the proposed solutions and regular project status reports.

4. Problem-solving skills. In every project, it's unexpected problems or challenges that drive everyone crazy. The project manager must be able to effectively handle these situations and mitigate risks so they don't get out of control.

5. Professional training. When assessing the project team proposed for to manage and implement a project, donors will often look not only the formal, long term training and qualifications, but also the kind of professional training completed post graduation. They also consider the length of time a person has been working in the role similar to the one they will fill in the project. All this is for a very good reason. Being a project manager is a complex and demanding task. For it to also be rewarding, you need the skills and knowledge to do it well.

There is a fit between the key characteristics of a great project manager and five key components of successful project management - see the Table 16 below.

Table 16. Relation between Successful Projects and Successful Project Management Needs

Successful projects include:	Successful project management needs:
Monitoring and evaluation	Organizational skills, professional training
Communication	Communication skills
Managing risks and maximising opportunities	Problem solving skills
Good organization	Personal organizational skills
Good people management	Interpersonal skills

If you feel you need more training to be a great project manager, there are avenues you can follow. Your organization may have a staff development programme or in house training organization. This is often the case with government departments. There may be incentive programmes conducted by your government to increase the general level of skills, alternatively you may be able to incorporate relevant training in support offered by donors.

A tool kit for successful project management⁹

Successful projects are those that are delivered as promised, completed on time and to budget, produce the expected quality of outputs, meet the original purpose and stakeholders expectations and leave the project team satisfied and motivated to do. Below as shown in Table 17 is a set of real tools that with help any project manager to best manage any project. When reviewing the tools, remember that:

- The following tools represent the key information and thought processes that are needed to effectively manage a project
- Separate documents are not always needed. Relevant information, particularly in relation to a particular topic such as planning, can be grouped in to a single document
- Planning documents need to be reviewed and agreed to by the relevant project stakeholders and team members

As you can see, the following tools all fit neatly into the five essential components of project management, monitoring and evaluation, communication, managing risks and maximising opportunities, good organization, and good people management.

⁹ The following draws heavily on 'Absolute Beginner's Guide to Project Management', Que Publishing but is substantially modified to meet the requirements of this training. See the original material see www.quepublishing.com/title/0789731975.

Have a look at the five key components of successful projects, and see if you can decide which tool will help with which component and why. For example, the Project Organization Chart/organogram will help ensure good people management because all team members will have a clear understanding of their roles and responsibilities and relationships with other members of the project team. This will reduce confusion and frustration.

Table 17. Project Manager Tools (some of these tools can be combined)

Tool	Description	Benefit	Notes
Project Contract/ Agreement	A document that authorises project and the project manager.	Provides official notice to the organization	Essential before any work starts on the project. Unless there is authorisation, there is no requirement by the donor to cover any costs incurred. Depending on the nature of the project, this is not always be a formal document; at a minimum, get email notification followed up by more formal documentation
Project Definition document	Often can be a logical framework. Defines project purpose, objectives, success criteria, and the scope of the work	Key for managing expectations, controlling scope, and completing other planning efforts	Some of these components can change in the development phase of the project or after the initial/inception phase of the project. It is important that the final definition of the project is clear for all participants
Requirements/output Document	Can also be in the Logical /frame work. Defines the specifications for products/ outputs of the project	Key for managing expectations and controlling scope	Essential for control of the quality of the outputs or products
Project Schedule/or timeline	Shows all work efforts and activities, reasonably estimated, assigned to responsible people and scheduled according to the calendar	Key for directing all project team work efforts; Key for managing expectations; Allows for impact and what-if simulations when things change	
Milestone Chart	It is a summary of the detailed project schedule/ timeline showing progress against key milestone	Allows stakeholders to see high level project progress on one page	Detailed work plans and timelines can be difficult to read and interpret; or to Incorporate into Status Reports. A simplified version allows for instant overview and tracking

Table 17. (Continue)

Status Reports	Periodic reviews of actual performance/outputs versus expected performance/ outputs	Provides essential information to stakeholders; Allows for timely identification of performance variances	Core tool
Project Organization Chart/ sometime also called an organogram	Shows the project team, partners, stakeholders, beneficiaries and the working relationships among them	Allows team members and all project participants to get a better understanding of project roles and organizational dynamics	On smaller projects, may be combined with project plan or project definition document
Responsibility Matrix	Defines all project roles and the responsibilities that go with that role including decision making responsibilities.	Key for managing expectations; Establishes accountability, Clarifies who should make what decision	As above, on smaller projects, may be combined with project plan or project definition document
Communication Plan	Defines the how, what, when, and who regarding the flow of project information with the project team, and to stakeholders including the donors, beneficiaries and partners	Key for managing expectations; Establishes buy-in	On smaller projects, may be combined with project plan or project definition document
Monitoring and Evaluation Plan	Defines the approaches and methods that will be utilized to monitor the project and manage the quality levels of project processes and results	Key for managing expectations regarding quality, performance, and compliance with planning and budgets	On smaller projects, may be combined with project plan or project definition document
Staffing Management Plan	Lists how project experts will be recruited, when they are needed, how much they are needed, and how long they will be needed	Key for building the schedule; Key for properly managing human resources	May also include role profiles, rates, training needs; On smaller projects, may be combined with project plan or project schedule.
Risk Response/Risk management Plan	Lists each identified risk and the planned response strategy for each	Communicates potential issues in advance Proactive measures help reduce impact to project	On smaller projects, may be combined with project plan or project definition document
Project Plan	Formal, approved document that is used to manage project execution	Includes all other supplemental planning documents; Key output of project planning	On smaller projects, it may combined with the project Project Schedule/ timeline
Summary of the Deliverables	Defines and lists all deliverables to be produced by the project	Key to managing expectations; Ensures proper visibility, tracking, and reporting of targeted deliverables	May be combined with status reports

Table 17. (Continue)

Project Log	Captures essential information for each project risk, issue, action item, and change	Ensures proper visibility, tracking, and reporting of items impacting the project	Can be combined with the Project file
Project File	Used by project manager to maintain official record of important project documents and deliverables	Part of managing project information	Electronic and/or hardcopy versions
Terms and Conditions	These are the rules or expectations by the donor for the conduct of the project.	Ensures that everyone is clear about what are the proper processes to follow and avoids breaches in the agreement with the donor that may come from	Usually these from part of the project contract/ agreement
Standard Formats	The particular form to be used each time an activity or process is required eg report formats, requests for changes in budget or activities, time sheets, expenses forms, requests for payment	Ensures consistency in project documentation and reporting, ensures all the required information is included and the proper processes followed, allows for clearer tracking and reporting	
Administration guidelines/Procedures	Outlines the proper processes to follow and which forms to use	Ensures that all the donor terms and conditions are met and the procedures required by your own organization are known and followed by the project team	Important when there are several countries involved to know in which country
Grievance procedure/ Disputes Resolution Document	Outlines the steps to follow when you are not happy with the conduct of another team member/project partner or how the project is being implemented. Outlines how disputes should be resolved and the legal basis for this resolution	Ensures the project team know how to address differences and disputes in a constructive way and also under which legal measures the dispute should be resolved	

Project management software

There are several project management software available that help you to manage complex and or multiple projects. These software would remind you of upcoming tasks, deadlines, warn you if project tasks and events clash, help you to monitor roles, responsibilities, provides you space to share documents, comments etc. These software come in all shape and forms: desk-top, web-based, individual and collective use, for single and multiple projects, simple or complex projects etc. On-line (internet-based) project management software are especially useful when your project staff work in various geographical locations and the project has a tight schedule which requires frequent monitoring of milestones.

Consider, however, if and/or when you want to use project management software as it takes significant amount of time for keeping your project management system up-to-date. You may not really need computer software to manage simple projects.

In order to use any of these project management software effectively, you need to, however, fully master the basics of project design and management.

This is a list of open source and commercial project management software:

- List of recommended software: <http://www.teamtechnology.co.uk/project-management-software.html>
- PRINCE2 <http://www.citi.co.uk/open/Method-and-accreditation/PRINCE2/>
- Project Place (web-based) <https://projectplace.com/>
- Web Office (web-based) <http://www.weboffice.com>

Activity 31

You will be brainstorming on the following question in the whole group: 'What do we need to do to achieve a successful project?'

Activity 32

You will be interviewed with the following question in the whole group: 'Briefly outline what you found effective and useful in the delivery of your projects?'

Activity 33

You will be invited to select a tool and explain what you understand the tool to be, how it is used and the value of it. This is a fun, whole group activity.

Activity 34

You will be invited to reflect on what of your delivery and management skills you wish to further improve, followed by a discussion on how and where you can find opportunities.

■ Session 22

Monitoring and Measuring Impact

Objectives

By the end of the session you will:

- be able to discuss the importance of treating the donor as partner
- develop shared understanding of how monitoring and evaluation can ensure successful project delivery
- be able to discuss the importance of involving partners in monitoring and evaluation
- develop shared understanding of common, typical problems, unexpected events which could hinder project implementation and how to 'put the project back to track'

☑ Activity 35

You will be playing the role of a project manager in four situations (see below) where the project is taking unexpected direction.

You will discuss your project management suggestions from three perspectives:

- (1) How can you put the project back to track?
- (2) What monitoring tools could have you used in the past or could you in the future to prevent the current situation?
- (3) How do you communicate the situation with the donor?

Situation 1

You are the project manager. The project is in its last year.

A critical year in terms of making sure the technical innovations are accepted by all stakeholders. These technical innovations have been criticised as economically beneficial but socially and environmentally rather questionable measures.

You do not hear from one of your colleagues for two weeks. This colleague of yours is working for a partner organization, an excellent colleague, full of initiatives, great communicator, a key person in terms of getting things done, keeping good public relationship, raising the project profile, and having solid knowledge on appropriate technologies. Not hearing from him is rather unusual. You drop a few e-mails but no answer. You are just about calling when there is an e-mail from your missing colleague saying that he was hired for an important government job and he is leaving the project in a week.

1. How can you put the project back to track?
2. What monitoring tools could have you used in the past or could you in the future to prevent the current situation?
3. How do you communicate the situation with the partners?
4. How do you communicate the situation with the donor?

Situation 2

You are the project manager. You are half way through a three year project.

You achieved all planned objectives of year one in terms of number of participants, number of events and timeliness. The number of participants in your project activities is actually even higher than anticipated.

As you are preparing for a training of trainers event and you are doing a training needs assessment, you find out that people are asking for different set of knowledge and skills than you had planned in the proposal. The new situation requires new research. Your project is heading to a new direction.

1. How can you put the project back to track?
2. What monitoring tools could have you used in the past or could you in the future to prevent the current situation?
3. How do you communicate the situation with the partners?
4. How do you communicate the situation with the donor?

Situation 3

You are the project manager. It is still in the early phase of the project.

This phase is just after the first half year report which reported on the establishment of the project office, and hiring a local coordinator. You are working a lot, putting in increasing number of hours and you are realising that you are picking up tasks what others were supposed to do but never happened.

You feel frustrated as your project is just at the beginning but already behind timeline.

1. How can you put the project back to track?
2. What monitoring tools could have you used in the past or could you in the future to prevent the current situation?
3. How do you communicate the situation with the partners?
4. How do you communicate the situation with the donor?

Situation 4

You are the project manager. Your project is half way through.

You are drafting the mid term report and as you are flicking through the previous progress reports, you realise how activities have been completed but also how difficult to work with your partners, how difficult to coordinate with them, e.g. events clash and do not follow your original project plan, and they have not even sent you the necessary information and data to report against project objectives, and the logical framework... so do not even know if the project is on track in spite of all the activities. You wonder why.

1. How can you put the project back to track?
2. What monitoring tools could have you used in the past or could you in the future to prevent the current situation?
3. How do you communicate the situation with the partners?
4. How do you communicate the situation with the donor?

Situation 5

You are the project manager. Your project is approaching to the end of the first year.

You are drafting the annual financial report and you realise that you still have a lot of money, you have under-spent.

1. How can you put the project back to track?
2. What monitoring tools could have you used in the past or could you in the future to prevent the current situation?
3. How do you communicate the situation with the partners?
4. How do you communicate the situation with the donor?

■ Session 23 Reporting

Objectives

By the end of the session you will:

- be able to list guidelines for writing reports and keeping the donors informed
- analyse examples of effective project reports of various level of complexity (mid-term; final; activity report; financial report)
- be able to discuss the importance of involving partners in writing reports
- be able to list three effective tools for disseminating project results

Provide regular reports to the donor

In discussions about the operating agreement, the project donor will indicate what they expect from the executing agencies in terms of reporting. Donors usually provide guidelines about the frequency, level of detail and types of issues that should be covered in a regular report, as well as identifying the kinds of issues that should be discussed directly with the donor, rather than in a report. Familiarise yourself with the report guidelines and contact the donor if in doubt.

Most donors provide report formats. These formats require you to re-visit your proposal, your goal, report on the progress made towards your objectives. Most donors require you to report on the categories of the project logical framework.

Involving partners in reporting

As you involve your partners in monitoring and evaluation, you may also want to engage your partners in writing reports. The joint writing process adds extra clarity, highlights the key achievements and consolidates the sense of ownership. A joint writing process requires setting clear roles and responsibilities, allocating plenty of time, so be prepared to develop a plan before each reporting period leaving generous amount of time both for exchanging notes between partners and finalising the report (copyediting, proofreading, binding, burning a CD-ROM with all attachments, photos etc.).

Support appropriate publicity and public relations

There are usually several different groups who are interested in a project and its results, in addition to the project partners, donors and stakeholders. Others who work in a similar or related field, government agencies, political representatives, and the general population in the area are likely to be interested in how the project is going. The nature of the project and, sometimes the donor's guidelines, will determine

when and how information about the project should be provided to these interested parties. Project team members may be asked to host officials or visiting experts and to explain the project to them, to provide information for press releases, or to help plan an event, (for example, an official launch, or a celebration of a project achievement, such as the first graduates from a programme). Project team members may also want to report to colleagues on the project at academic or scientific meetings. In general, provision of interim information should be cleared with project colleagues and the donor.

Prepare the final report

Almost all project donors will require a final report. If project partners have been maintaining their records and keeping progress notes throughout the project, it will make it much easier to prepare the final report. Other stakeholders, such as government agencies, may also require a final report. It may save time if the project partners can reach an agreement with donors and stakeholders that one final report will meet the needs of all concerned, but this is not always possible. In some cases, it may be more efficient to produce separate reports that address the specific concerns of donors and stakeholders: trying to prepare a large report that addresses very diverse issues may result in an unwieldy, less effective document.

The resources for the report will include the project workplan, evaluation plan, budget, progress reports and evaluation reports, and the original project proposal. The project proposal provides a point of reference, explaining what the project intended to achieve when it was first envisioned. It also serves as a means of comparing the situation at the time the project was planned with the situation when the project has been completed.

The contributions of those who helped with the project should be acknowledged appropriately: these include the donors, partners, stakeholders and individuals outside the project who provided advice and support.

Disseminate results

Some donors require that results of a project are disseminated, that is, that they are made available widely within the field. This entails, in addition to the project report, publication of findings in appropriate journals, presentations at conferences, communication with colleagues in related areas, and in some cases, planned publicity activities, such as presentations and interviews in the media.

Activity 41

Having learned about key reporting tips, you will be analysing a project report by the donor's reviewing guidelines in the whole group. You will be playing a reviewer who has not met the project partners and has not visited the project before either.

■ Session 25

Next Steps

Objectives

By the end of the session you will have:

- developed steps and timeline to share your knowledge and skills gained at this workshop with your colleagues for the completion of developing your own proposal
- re-visited the learning objectives and activities of the five the training workshop
- reflected on your sense of achievements compared to your expectations
- formulated key lessons learned
- evaluated the workshop and provided feedback for the improvement of similar Project Design and Management training workshops in the future
- received the certificate for attending this training programme

Activity 37

You will be invited to list the first steps for activities you need to do right after the workshop to complete the proposal you drafted in this project.

Activity 38

You will be revisiting your training goal and objectives with 'walking' through the five day schedule and activities, followed by checking your original expectations.

You will be using a simple technique to discuss the following two questions:

1. 'To what extent have you achieved your expectations?'
2. 'What are the key lessons you are taking from this workshop?'

Activity 39

An individual activity, fill out and submit the workshop evaluation form.

Resource needed:

- Workshop Evaluation Form