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UNIT 7
PROJECT MANAGEMENT



Introduction

- Welcome to the last unit of this module.
- In this unit we will focus on project management.
- First we will introduce you to the concept of project management.
- Then we will discuss a practical approach to project management.
- In the final part of the unit we will learn how to write project proposals.
- The purpose of this unit is not to merely help you develop a broader understanding of project management, but also to enable, you the education manager, to practically undertake project management and write project proposals.



Expected learning outcomes

Upon completion of this unit, you will be able to:

a) Explain the concepts of project management

b) Apply the skills required to manage a project

c) Write a project proposal



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Introduction to project management

In this section you will be taken through the concepts related to performance management, critical issues related to performance management, factors influencing the success of projects, the project cycle and project planning tools.

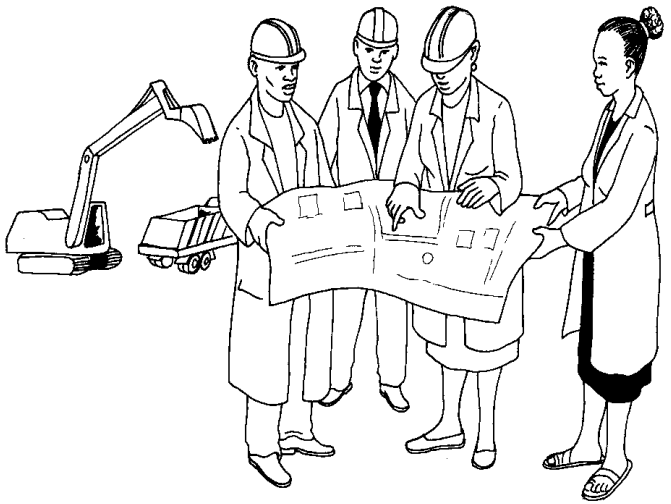
Definition of terms

Project:

- This is a series of tasks directed towards a specific outcome/goal.
- It is a set of activities which must be implemented in a logical sequence in order to achieve a well-defined objective which usually addresses the needs of an institution.

Project management:

- Project management is the process of combining systems, techniques, and knowledge to complete a project within established goals of time, budget and scope.
- It is the process of leading a team of capable people in planning and implementing a series of related activities that need to be accomplished on a specific date with a limited budget



Project scheduling:

- This involves splitting the project into tasks and estimate the time and resources required to complete each task.
- It involves organizing tasks concurrently to make optimal use of the workforce.

Project milestone:

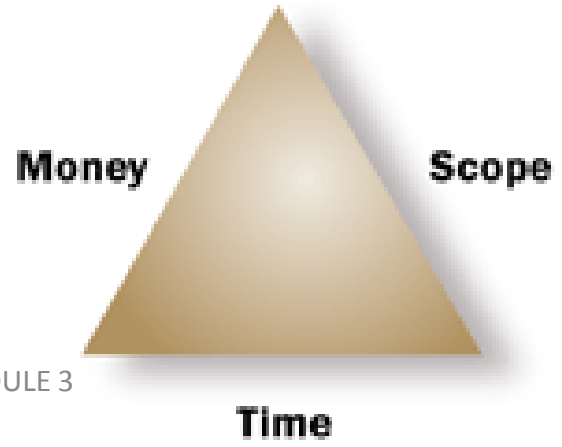
- This is a predictable state where a formal report of progress is presented to management.

Project plan:

- The project plan sets out the resources available to the project, the work breakdown and schedule for the work.

Factors that affect project management

- According to Microsoft (2014) at every project's core is the trio of time, money, and scope.
- These are the factors you juggle every day to keep your Project plan on track.
- If time, money, or what your project accomplished were unlimited, you would not need to do project management.
- Most projects have a specific time limit, budget, and scope.
- It is this combination of elements (time, money, and scope) that are referred to as the project triangle or the triple constraints of a project.





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- If you adjust any one side of the triangle, the other two sides are affected.
- For example, if you decide to adjust the project plan to:
  - Reduce the scheduled time - you might end up with increased costs and a decreased scope.
  - Reduce the project budget - the result might be a longer schedule and a decreased scope.
  - Increase scope - your project might take more time and cost more money in the form of resources, such as workers.

Factors influencing success of a project:

For a project to succeed, as a manager, you need to take the following factors into consideration.

(i). Controlling

- Having a documented change management in place
- Holding regular and frequent meetings
- Avoiding scope creep
- Taking regular measurements of performance



(ii). Leading

- Ensuring the support of senior management
- Obtaining customer involvement
- Maintaining realistic expectations
- Encouraging and sustaining a sense of owner ship by all participants
- Having commitment and cooperation of all participants.

(iii). Defining

- Dividing the project into manageable pieces
- Keeping the scope well defined
- Having a clear definition of requirements
- Focusing on customer/client
- Having a clear mission and objectives



(iv). Planning

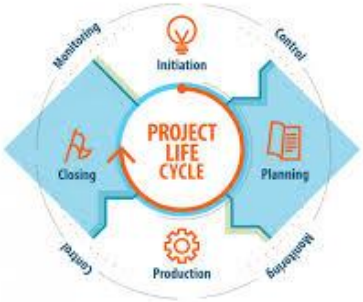
- Focusing evenly on technical and business issues
- Developing meaningful plans
- Having more frequent project milestones
- Having shorter flow time

(v). Closure

- Releasing people correctly to minimize impact on morale and performance.



- Describe one project in your institution that has been completed.
- Identify the key elements in the success of this project



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Project management cycle

The phases of the project management cycle can be illustrated as follows:

Phase 1
Phase 2
- Planning
- Identification

Phase 3
Phase 4
- Formulation
- Financing

Phase 5
Phase 6
Phase 7
- Implementation
- Evaluation
- Close out



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i. Programming:

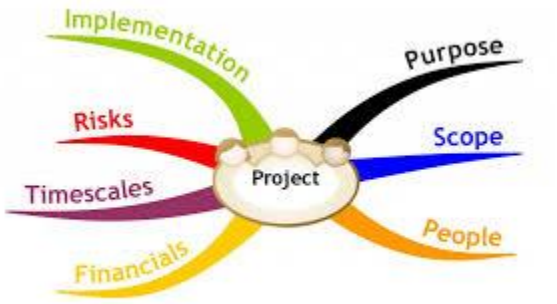
- During this phase, an analysis is undertaken to identify problems, constraints and opportunities which the project could address.
- The purpose is to identify and agree on the main objectives and priorities for the project.

ii. Identification:

- In this phase, ideas for projects are identified and screened for further study.
- To identify what a project will focus on, we need to find out who should benefit and what their needs are.
- A —needs assessment will give an overview of the institutions problems.
- A —capacity assessment will help identify which problem the project should address.
- This involves consultation with the intended beneficiaries of each action, an analysis of the problems they face, and the identification of options to address these problems.

iii. Formulation:

- In the formulation phase relevant project ideas are developed into operational project plans.
- Beneficiaries and other stakeholders participate in the detailed specification of the project idea that is then assessed for its feasibility (whether it is likely to succeed) and sustainability (whether it is likely to generate long-term benefits for the beneficiaries).
- On the basis of this assessment, a decision is made on whether to draw up a formal project proposal and seek funding for the project.



iv. Financing:

- The financing phase requires for project proposals to be examined by the funding agency and a decision is taken on whether to fund the project.
- The funding agency agrees on the modalities of implementation and formalizes these in a legal document which sets out the arrangements by which the project will be funded and implemented.





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v. Implementation:

- During this phase, the project is mobilized and executed.
- This may require the tendering and award of contracts for technical assistance or works and supplies.
- During implementation, and in consultation with beneficiaries and stakeholders, project management assesses actual progress against planned progress to determine whether the project is on track towards achieving its objectives.
- If necessary the project is re-oriented to bring it back on track, or to modify some of its objectives in the light of any significant changes that may have occurred since its formulation.



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vi. Evaluation:

- Evaluation should be carried out at or after project
- completion.
- The funding agency assesses the project to identify what has been achieved, and to identify lessons that have been learned.
- Evaluation findings are used to improve the design of future projects or programs.
- It is common practice to conduct a mid-term evaluation during the implementation phase.



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vii. Project handover, closure and review:

- The last major phase of a project's life cycle is the close-out.
- This involves formally terminating and concluding all tasks, activities, and component parts of a particular project, or phase of a project.
- It typically involves the transfer, acceptance, and approval of the final deliverables to the assigning party, or, in the event the activity did not end up taking place, initiating and completing the cancellation process.
- It is essential to fully complete the closing process so that no further charges can be accrued by or attributed to that project, allow staff to be reassigned to other projects and check whether the outcomes match the stated goals of the project.



Discuss how each phase of project management might impact on the success of a project.



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Principles of Project Cycle Management (PCM)

i. **Adherence to the phases of the project cycle** to ensure a structured and well-informed decision-making process.

ii. **Client orientation** through the use of participatory planning workshops at key phases of the project cycle, and the formulation of the Project Purpose in terms of sustainable benefits to be delivered to beneficiaries.

iii. **Incorporation of aspects of sustainability into project design** to ensure sustainable benefits.

iv. **Use of the Logical Framework Approach** to ensure a consistent analytical approach to project design and management.

v. **An integrated approach** which links the objectives of each project into the objectives of the institution and education at a national level.



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PCM Planning and Management Tools:

- In this section we will focus on two project planning tools: Logical framework approach (log frame) and the Gantt chart.

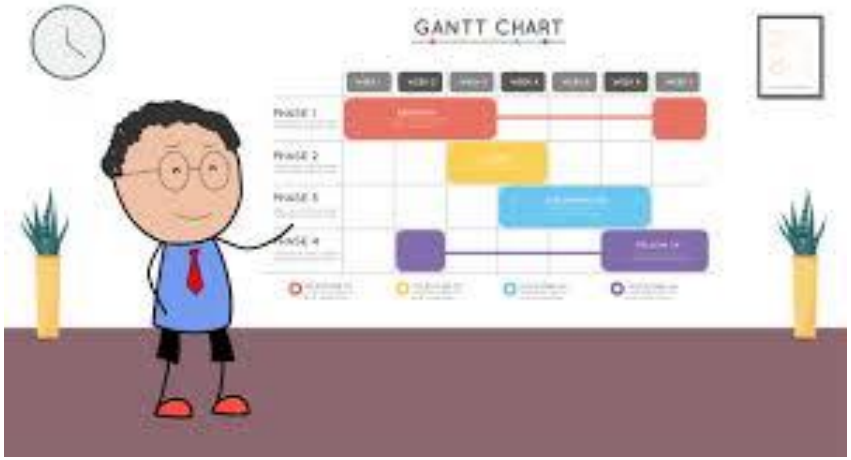
(i). Logical Framework Approach (LFA):

- This is an effective technique for enabling stakeholders to identify and analyze problems and to define objectives and activities which should be
- undertaken to resolve these problems.
- Using the log frame structure, planners test the design of a proposed project to ensure its relevance, feasibility and sustainability.
- In addition to its role during program and project preparation, the LFA is also a key management tool during implementation and evaluation.
- It provides the basis for the preparation of action plans and the development of a monitoring system, and a framework for evaluation. Below is a log frame matrix:



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[Project Name] LOGFRAME			
objectives	indicators	Means of verification	Assumptions
Goal 1			
Outcome 1			
Output 1.1			
Output 1.2			
Output 1.3			
Activities may often be included in separate document (activity schedule) for practical purposes	Inputs/ resources	Inputs/ resources	



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Gantt chart

- This is a graphical representation of a Project that shows each task as a horizontal bar whose length is proportional to its time for completion.
- A Gantt chart is a horizontal bar chart that illustrates a Project schedule.
- In the Gantt chart time is displayed on the horizontal axis and the tasks/ activities are arranged vertically from top to bottom, in order of their start dates.
- A detailed Gantt chart for a large project might be quite complex and hard to understand.
- To simplify the chart Project manager can combine related activities into one Task.
- Below is an example of a Gantt chart template.

Task	Persons Responsible	YEAR				Cost (Kshs)
		Quarter 1	Quarter 2	Quarter 3	Quarter 4	
Task 1						
Task 2						
Task 3						
Task 4						



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Practical project management

- In order to practically engage in project management you need to first of all get started (initiation), define your project, plan your delivery and finally close down the project.
- We'll examine these steps one by one in details:

A. Getting Started – Initiation

1. Develop a solid business case for your project. Where appropriate, ensure you obtain senior managers' agreement before you start the project. Research points out that too many projects are started without a firm reason or rationale. Developing a business case will identify whether it is worth working on.
2. Ensure your project fits with the key organisational or departmental agenda or your personal strategy. If not, why do it? Stick to priority projects.
3. Carry out risk analysis at a high level at the initiation stage. Avoid going into great detail here – more an overview focusing on the key risks.
4. Identify at this early stage key stakeholders. Consider how much you need to consult or involve them at the business case stage. Seek advice if necessary from senior managers
5. Where appropriate, involve finance people in putting the business case together. They can be great allies in helping crunch the numbers which should give credibility to your business case.



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B. Defining Your Project

6. Produce a written project definition statement (sometimes called PID) and use it to inform stakeholders – see point 13. This document is “your contract‘ to carry out the project and should be circulated to key stakeholders.
7. Use the project definition statement to prevent creep (Scope creep is one of the most common reasons projects run over budget and deliver late). Use it to prevent you going beyond the scope of the project through its use in the review process.
8. Identify in detail what will and will not be included in the project scope. Avoid wasting time by working on those areas which should not be included – identify these in the PID.
9. Identify who fulfills which roles in your project. Document them on the PID. Include a paragraph to show what each person does.



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10. Identify who has responsibility for what in the project e.g. project communications is the responsibility of project manager. This helps reduce doubt early in the life of the project.
11. Think “Team Selection‘ – give some thought to who should be in your team. Analyse whether they have the skills required to enable them to carry out their role? If not, ensure they receive the right training. Check they are available for the period of the project. NOTE: this includes any contactors you may need to use.
12. Form a group of Project Managers. The Project Manager role can sometimes be very lonely! Give support to each other by forming a group of Project Managers.
13. Identify who the **stakeholders** are for your project – those affected and ‘impacted‘ by the project. This should be an in-depth analysis which needs updating regularly.



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14. Recognise early in the life of the project what is driving the project. Is it a drive to **improve quality, reduce costs** or hit a **particular deadline?** *You can only have 1.* Discuss with the sponsor what is driving the project and ensure you stick to this throughout the project. Keep —the driver in mind especially when you monitor and review.
15. Hold a kick off meeting (Start-up Workshop) with key stakeholders, sponsor, and project manager project team. Use the meeting to help develop the PID (see Tip 6). Identify risks and generally plan the project. If appropriate hold new meetings at the start of a new stage.
16. Ensure you review the project during the Defining Your Project Stage –involve your sponsor or senior manager in this process. Remember to check progress against the business case.



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C. Delivery Planning

17. Create a Work Breakdown Structure (WBS) for the project. A WBS is a key element you will need to develop your plan. It lists out all of the activities you will need to undertake to deliver the project. Post it notes can be a great help in developing your WBS.
18. Group tasks under different headings once you have a list. This will enable you to identify the chunks of work that need to be delivered, as well as put together the Gantt chart and milestone chart.

19. Identify dependencies (or predecessors) of all activities. This will let you put together the Gantt and milestone charts. Ensure you write them down otherwise you are trying to carry potentially hundreds of options in your head.
20. Estimate how long each activity will take. Be aware that research points out we *are notoriously bad* at estimating. You estimate a task will take 3 days. Identify how confident you are that you can deliver in 3 days by using % E.g. I'm only 40% certain I can deliver in 3 days. You should aim for 80%. If you do not believe you can achieve 80% then re-calculate
21. Identify the critical path for the project. The critical path identifies those activities which have to be completed by the due date in order to complete the project on time.





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22. Communicate, communicate, and communicate! Delivering a project effectively means you need to spend time communicating with a wide range of individuals. Build a communication plan and review it regularly and include it in your Gantt chart.
23. Are you involved in a major change project? If you are, think through the implications of this on key stakeholders and how you may need to influence and communicate with them.
24. Conduct Risk Assessment – carry out a full risk analysis and document it in a risk register. Regularly review each risk to ensure you are managing them, rather than them managing you. Appoint a person to manage each risk.

25. Develop a Gantt chart and use it to monitor progress against the plan and to involve key stakeholders in the communications process.
26. Draw up a milestone plan. These are stages in the project. You can use the milestone dates to check the project is where it should be. Review whether activities have been delivered against the milestone dates and take a look forward at what needs to be achieved to deliver the next milestone.





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D. Project Delivery – Monitoring and Reviewing Your Project (Project Governance)

27. Have a clear project management monitoring and reviewing process – agreed by senior managers - the project sponsor and the project Board, if you have one.
28. Ensure your organisation‘s corporate governance structure and your project management monitoring and control structure are compatible. If you do not know whether this is the case then seek senior management involvement.
29. Be aware early in the project what will be monitored, how they will be monitored and the frequency.

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33. Agree to a system for project changes – have an agreed system for monitoring and approving changes. Use change control forms and obtain formal sign off (agreement) by the sponsor, *before* action a change. Look for the impact of the change on the project scope as well as the —key driver - quality, and cost and time.
34. Appoint someone to be responsible for project quality especially in larger projects. Review quality formally with the client at agreed milestone dates.
35. Make certain you have agreed who can sanction changes in the absence of your sponsor. If you haven‘t agreed this, what will you do in their absence?
36. Set a time limit for project meetings to review progress. Have an agenda with times against each item and summarise after each item at the end of the meeting.
37. Produce action points against each item on the agenda and circulate within 24 hours of the meeting. Use these action points to help in the creation of your next agenda.



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38. Review the items on the critical path checking they are on schedule. Review risks, review yours stakeholders and your communication plans and whether you are still on track to deliver on time, to budget and to the required quality standard.
39. Set a tolerance figure and monitor e.g. a tolerance figure of ±5% means as long as you are within the 5% limit you do not have to formally report. If exceed the 5% limit (cost or time) then you need to report this to the agreed person – probably your sponsor

Report progress against an end of a stage – are you on schedule? Time, cost or quality? Ensure that if something is off schedule the person responsible for delivering it suggests ways to bring it back on time, within budget or to hit the right quality standard.

40. Develop an issues log to record items that may be causing concern. Review at your project meetings.
41. See whether you are still delivering the original project benefits when reviewing your project. If not, consider re-scoping or if appropriate abandoning the project. Do not be afraid of abandoning a project. Better to abandon now rather than waste valuable time, money, and resources working on something no longer required. If you close a project early – hold a project review meeting to identify learning.
42. Produce one-page reports highlighting key issues. Agree on the areas to include with the Sponsor before writing a report.
43. Use a series of templates to support the monitoring process, e.g. milestone reporting, change control, log, planned v. actual.





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44. Apply traffic lights to illustrate how you are progressing – red, amber and green. Use these in conjunction with milestone reports.
45. Engender honest reporting against specific deliverables, milestones, or a critical path activity. If you do not have honest reporting imagine the consequences.

E. Closedown and Review

46. Agree well in advance on a date to hold a post project review meeting. Put this onto the Gantt chart.
47. Invite key stakeholders, sponsor, and project team to the post project review. If the date is in their diary well in advance it should make it easier for them to attend



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48. Focus your meeting on learning – identifying what you can use on the next project. Share the learning with others in the organisation.
49. Check whether you have delivered the original project objectives and benefits and not gone out of scope.
50. Make sure that you have delivered against budget, quality requirements and the end deadline.
51. Understand how well you managed risks and your key stakeholders. Use questionnaires to obtain feedback.
52. Prepare a list of unfinished items. Identify who will complete these after the project and circulate to any stakeholders.



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53. Hand over the project formally to another group (it is now their day job) - if appropriate. You may need to build this into the project plan and involve them early in the plan and at different stages throughout the project.
54. Write an end of project report and circulate. Identify in the report key learning points.
55. Close the project formally. Inform others you have done this and who is now responsible for dealing with day to day issues.
56. Celebrate success with your team! Recognise achievement, there is nothing more motivating.



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Project proposals

- A Project Proposal is a document that justifies the need for the project and objectives including methods and resources of achieving them within a given period with an aim of getting funds for its implementation.
- It is an implementation schedule of a project and justification document forwarded to the donors or project sponsors.

Proposal writing tips

- The following tips are important to bear in mind before and while writing a project proposal.



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i. Use clear and simple language.
ii. Explain points clearly and avoid verbosity.
iii. Attach verification and further explanations in the appendix.
iv. Present a problem that has been agreed upon by all stakeholders. The Beneficiaries should guide you on the priority area.
v. To describe the project background, research properly about the issues in question.
vi. Include only the information that is relevant to the project.
vii. Some donors or sponsors have their own guidelines on proposal writing; enquire first before writing.

Contents of a project proposal

- Below is the Layout of the proposal, and guidelines on what should be contained under each section, and, where applicable, how the information should be presented.

I. Front cover and title page: This will include:

- The project title, which should preferably be a single line.
- Location and name of the organization or institution.
- Names of key people in the project.
- The cover, which should look professional.





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II. Executive summary (Project overview or abstract)

- This section summarizes the key information on the project, and should be 1 to1 ½ pages.
- It should include the problem, a short description of the project, the resources required, and the design of the project
- It justifies the need of the project and tries to give the reader a positive impression of what is proposed.
- It is written last.



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III. Background information/Introduction

- This section explains why the project is needed and shows that it can be completed within the limitations of time and budget provided.
- It covers information on the situation analysis.
- It defines the problem, its seriousness and who are affected.
- The extent of solving the problem so far is explained.
- It should give a brief history of the problem, and cite previous projects and studies similar to the proposed one. It indicates how the problem to be addressed will help the potential funding agency in fulfilling their own objectives.
- It indicates the steps you have already taken.



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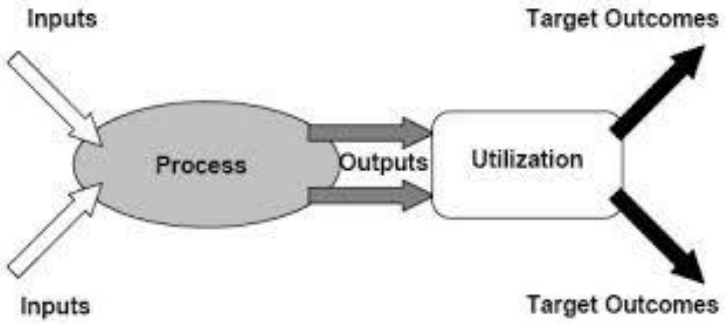
IV. Project description

- This section spells out the goals and objectives of the project.
- A goal is a statement indicating the change expected. The goal should be general and long-term. Objectives should be SMART i.e. specific, measurable, attainable, realistic and time bound.
  - Goal: To reduce infant mortality
  - Objective: To reduce incidences of malaria from 70% to 25% within 3 months. Objectives will form basis of activities and provide basis for the project.
- Ensure that there is a relationship between the goal and objectives, and those of the funding agency.

V. Beneficiaries/target group

- It describes both direct and indirect beneficiaries of the project. Who and what is the involvement, etc.
- It indicates that the beneficiaries have participated in the selection and planning.
- Verification of this claim can be attached.
- It indicates how assisting the target group is in the best interest of the funding agency.





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VI. Inputs

- This section describes the resources needed, including people, and describes in detail those who will be paid and the volunteers.
- It describe facilities that will be used, and whether purchased or rental.
- It describe existing facilities e.g. classrooms if it is a local institution.
- It lists the equipment needed. Equipment would include, computers, desks, chairs, tables, telephone, photocopying machine etc.
- Methods of implementing the project should be related to its objectives.
- The proposal should state how they will fulfill the objectives, and should include information on collaborative relationships with other Groups/projects.



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VII. Organization of the project

- The proposal should describe the organization and its management i.e. authority relationships, broad objectives of the organization and Structures to achieve the objective, and the composition of management groups.
- It should describe the personnel requirements e.g. qualifications, experience, numbers, volunteers, the numbers present and those required. It should clarify their roles and their relationship in relation to the success of the project, and briefly describe the relationship with other projects.
- It should indicate who will be responsible for which tasks.

VIII. Sustainability of the project

- The proposal must explain the viability of the project after the financiers withdraw or if not show that it is for a short duration only, or that other donors will take over.



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IX. Budget (costs and benefits)

- This section describes the personnel costs, materials, supplies and expenses.
- costs will include cost of capital i.e. interest rates, cost of nonmonetary contributions i.e. environmental degradation.
- Benefits will include increased income, literacy levels, etc.
- A comparison should be made between costs and benefits, if positive on benefits, and then it provides justification for the project.
- The budget should be presented in summary and include all sources of funds for the project.
- It should show some personal initiative in funding i.e. contributions from the community in terms of facilities, personnel and money.
- Foot notes can be used to explain various aspects of the budget if necessary.



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IX. Monitoring and evaluation

- This section should show that the monitoring and evaluation process will be participatory, and describe how these will be carried out.
- It should describe how the decision that the project is successful will be made.
- It should include samples of questionnaires in the appendices, showing both formative and summative methods.

X. Communication and reporting

- It indicates how you will be reporting the project results in monitoring and evaluation and of the outcomes. It should include the groups that will receive the reports.
- It should consider the donors, as they usually have their own reporting requirements. The type of reports and frequency of reporting should be clearly stated.

XII. Conclusion

- This is a brief summary of what the project is to achieve and a
- justification why the funding is needed. It also briefly explains the
- viability of the project.

XIII. Appendices

- Detailed documents described in the report should be included in the appendices. These may be:
- Dissemination plan: Plan for dissemination of information such as newsletter, workshops etc.
- Time line: Indication of the time frame for the project
- The evaluation instruments used.





- We have come to the last unit of module 3 where we looked at the concept of project management.
- We have learnt how to identify and initiate projects in schools and how to ensure that the ideas are viable.
- We have also learnt about the project management process and what needs to be done at each stage to ensure the successful completion of the project.
- In addition we have learnt how to write winning project proposals that will attract the necessary support and funding.
- It is our hope that you will put into practice what you have learnt in this unit in the next project that your school will undertake.