INTRODUCTION TO PROJECT MANAGEMENT

CONTENT

SAQA UNIT STANDARDS

The following SAQA Unit Standards have been incorporated into the training programme.

Unit Standard Title	SAQA ID	NQF Level	Credits
Plan, organise and manage oneself in the organisation	110078	2	2
Organise community group activities	119356	2	18

Specific learning outcomes

It is anticipated that the participants should be able to:

- Illustrate the components of project cycle
- Identify objectives of community activities according to specific context requirements.
- Plan activities in relation to expected outcomes.
- Planning and prioritisation is explained in terms of given time frames.
- Demonstrate an understanding of the effective use of time scheduling in the workplace.
- Manage time plan in the workplace.
- Apply corrective action steps where work-scheduling problems occur.

EXPECTATIONS

It is crucial in any learning process that the expectations and needs of the learners are identified. The identification of the learners' expectations and needs enables the course facilitator to create a relevant and learner - focused learning process.

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Activity

List all your expectations for this course

GROUND RULES

In most group situations it is important to collectively develop ground rules or norms of behaviour in order to create an environment that is conducive to learning for all participants. Ground rules set the tone for future group discussions and behaviour.

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Activity

List all your expectations for this course

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AN INTRODUCTION TO PROJECT MANAGEMENT

This course is designed in such a manner that each chapter is composed of learning objectives. These objectives outline the main points that are essential for each learning chapter.

The learning objectives consist activities which you should attempt. A number of think points and self check questions will appear at the end of every learning objective. The questions will test your understanding of the learning objectives. Solutions to these questions will be discussed and shared with the learning team.

Objectives

The purpose of this section is to ensure the following:

o Understand the definition of a project
o Understand the concept of project management

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Do you think it necessary to understand project management?

PROJECT MANAGEMENT CONTEXT

Projects are, more than ever, a fact of life for Non Profit Organisations. Changing patterns of funding, particularly the impact of the Community Fund, mean that it is becoming ever more common for agencies to develop their work and secure funding by developing *specific projects*. Funders, such as the European Union (EU) in their turn are asking for details of how projects will be managed, with some beginning to expect agencies to use one or another established project management system.

The Non Profit Organisations can learn that (irrespective of the level/position of a representative at the NPO sector) knowledge and that their ability to manage the growing number of projects can be improved.

The projects within the NPO sector could tend to be smaller, however, the process of making funding applications can be *an added complication*. With the essential skills of project management, this process could be made simpler.

A typical project starts with someone having an idea, which then gains acceptance from a wider group: probably informally through discussion with colleagues and then through a more formal process involving senior management, the management committee or board. This leads to a fund-raising process, which usually causes significant delay, and then if the funding bid is successful the project can start, staff can be appointed and work can begin. This work has to be planned and managed, problems dealt with, until the project concludes, hopefully successfully, and is wound up.

Formal methods of project management offer a framework to manage this process, providing a series of elements – templates and procedures – to manage the project through its life, i.e. project management cycle. The key elements are discussed below:

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Activity

What do you think project cycle management is?

Discuss this question in your working teams and develop own definition.

The project management cycle refers to a logical sequence of activities to accomplish the project's goals or objectives. Regardless of scope or complexity, any project goes through a series of stages during its life

2. TEAM ESTABLISHMENT

1. PROJECT DEFINITION

3. PROJECT PLANNING

(Scope, importance, project plan in terms of timeframes and resources)

4. IMPLEMENTATION

Continuous project monitoring

5. EVALUATION

6. PROJECT CLOSURE AND HANDOVER
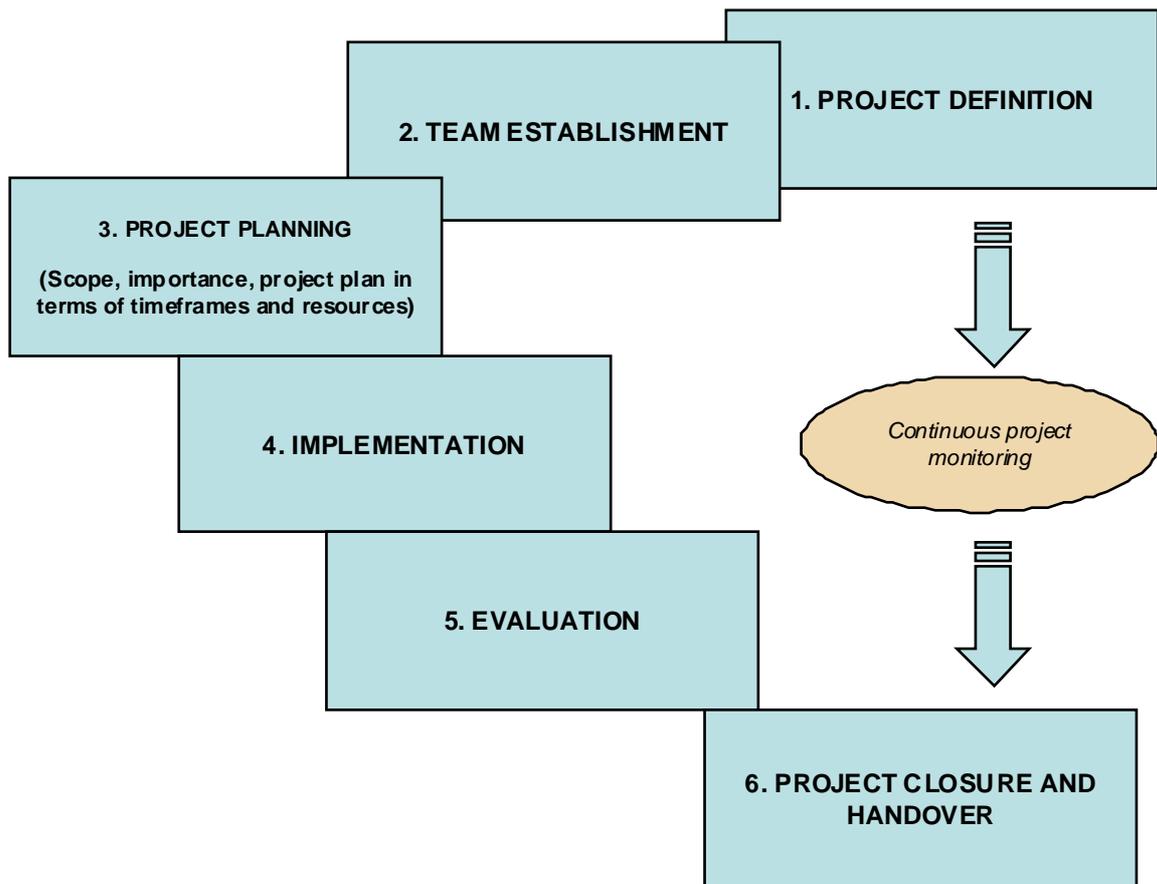
THE ROLE OF THE PROJECT MANAGER AND TEAM MEMBERS SELECTING THE RIGHT PERSON FOR YOUR PROJECT TEAM

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Think point

Interview a project manager in your organisation and ascertain what qualities he/she thinks are important from you as a project team member. What are your roles and responsibilities

SELECTING THE RIGHT PROJECT TEAM

At this point, it will be useful to form a project team. The team members can be an invaluable asset to your project. The team will act as a liaison between the project and the rest of your customers.

Customise plans and activities during phases of your project

Team members could give feedback to ensure that project activities suit the nature and needs of the organisation. Team members often know more about the organisation's culture and how to work within that culture.

Review processes

Team members can help develop and review plans for data collection, collect and analyse that data, generate preliminary recommendations and conduct presentations.

Monitor progress of the project.

Team members should know the project plans and be aware of the implementation status. Members can help, for example, by modifying plans and/or activities to get back on schedule or by changing schedules.

Sustain momentum throughout the planning process

Team members can show support for the project. Members of other NPOs or organisations can be inspired if they see team members really believing in the project.

Answer various questions from you during the project.

There will be times when you as an individual does not understand various terms and practices within a particular project. Team members can explain what is happening, any effects on the project, and suggest how the project might be modified – hence the importance of a project team.

Who Should Be on the Project Team?

The team should include committed individuals. That size often depends on the size of a project.

Membership on the team depends on the desired project outcomes and the scope of activities. If the number of employees in the organization is 10 or less, you might include all employees on the team. It often helps if the team is comprised of a cross-section of the employees, including executives, middle managers and entry-level employees. A cross-functional team can help to ensure that all levels of the organization have a chance to provide input to the development and implementation of the action plans for change, thereby increasing the ownership and participation. Also, a cross-functional team can bring a rich diversity of ideas often useful in generating diverse perspectives and opinions during the project.

REMEMBER: Project Team can include members from outside your NPO, such as investors, community members and specialists in the areas of the project.

GUIDELINES FOR YOUR PROJECT TEAM

The Manager or Chief Executive Officer should be on the team.

The Manager or CEO provides ongoing visible legitimacy, along with the ability to make decisions and provide historical information about the organisation. If there is a likelihood that the CEO will not

be on the team, members of the Board and the CEO should have clear and credible reasons for excluding the CEO.

Include the person responsible to ensure the project is finished.

Usually that person is the Manager or CEO. If someone else has primary responsibility, find out who that person is as soon as possible – that person is critical to the success of your project.

Encourage the Board Chair to be on the team.

Especially if your project involves significant change in your client's organization, the Board should consistently be aware of, and approve of, project activities. One of the best ways to ensure that kind of awareness is to include a key member of the Board on the team.

Include a "champion."
The champion helps to maintain enthusiasm during the project. Different people might fill the role of champion at different times, but you should always know who the current champion is.

Include someone to help administer the project.

For example, this person would ensure that materials and facilities are provided for meetings and that meeting results are well documented. This person can also take notes during meetings and distribute them to key personnel.

Consider including members from outside the organisation.

Examples of external members include investors, community representative or specialists in the project or service. These members can provide extremely valuable insight as to how planned changes will be perceived and can affect external stakeholders. Inclusion of investors on the team can provide significant credibility for the client to the investors, as well.

(Adapted from "Field Guide to Consulting and Organizational Development" –Authenticity Consulting, LLC.)

THE POWER OF PLANNING

Good project planning ensures that activities are carried out in the most effective and efficient way. Many projects fail because the project team is not able to put into place a project plan that meets the project goals and objectives.

Project planning is one of the most important phases of the project management process. The success or failure of a project is often determined in this phase.

There are many ways that are used to plan a project. Planning ways depend on the nature of a project, type of the organisation, management terminology used, skills of a project manager and project team, etc. For example, a public NPO involved in a project concerning community services will most likely use different planning techniques from that of a construction engineer.

In this section, please note that it is important to realise that the planning process has a rank of activities. The accomplishment of several lower level activities leads to the attainment of a higher-level activity. For example, accomplishing several objectives leads to the attainment of a goal; the attainment of several goals leads to achieving a project purpose; the completion of several projects leads to implementation of a programme / policy, etc.

There are generic planning steps and tools that are used by various project managers.

The purpose of this session is to introduce these planning steps and tools.

Project Goals and Objectives

Project goals and objectives are developed once the project has been identified.

Project goals are generally much broader than objectives. Time-frames and the expectations of goals are much broader than project objectives. The time-frame of goals might span over a few years, whereas the time-frame for **objectives** might span over a few months. A few objectives usually need to be developed in order to achieve one goal.

When you develop project goals and objectives, you must make sure that they are specific, measurable, achievable, realistic, and time defined).

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                    Thin point
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Interview your project manager in your organisation to **refine goal and objectives of an existing project**.

At the end of your interview, you and your manager should have unpacked the following key planning elements:

- Specific (indicate who is involved, what is involved, where the activity should be i.e. geographic location and/or physical location i.e. department/unit/directorate)
- Measurable (numbers and percentages and qualitative indicators)
- Achievable (indicate whether it is possible to implement the project or activity. Ask the question, can it be done?)
- Realistic (Is it is possible to implement the project? This is often determined by human resources, material resources, financial resources and time available in relation to the expectations of a project).
- Time bound (provide a timeframe. In this element, you need to indicate the start of project activities and forecast completion date)

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Activity (45 minutes)
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Together with your facilitator, develop a project goal and objectives, which are specific, measurable, achievable, realistic, and based on timeframes. Please base your examples on a real life projects.

A simplified project plan template is presented below:

Activity	Responsibility	Timeframe	Resource required	Budget	Indicator of success
Book a training venue	Matome	20 October 2007	List of venues and quotations	R 15,000	Confirmation letter

Various planning tools/techniques are used by various organisations, for example, Gantt Chart (Microsoft Project), Workbench, etc. An example of a Gantt Chart is presented below:

ID	Task Name	June 01		July 01			August 01		September 01		October 01		No
		06/04	06/18	07/02	07/16	07/30	08/13	08/27	09/10	09/24	10/08	10/22	
0	SKILLS DEVELOPMENT TRAINING												
1	1 Set up project team and agree on the process												
2	1.1 Meeting with the HWSETA and contract finalisation	2006 July 10 – 2006 July 10											
3	1.2 Work plan/business plan finalisation	2006 July 11 – 2006 July 11											
4	2 Programme customisation												
5	2.1 Consultation with selected HWSETA stakeholders	2006 July 12 – 2006 July 12											
6	2.2 Document review	2006 July 12 – 2006 July 13											
7	2.3 Incorporate learners' needs into the training programme	2006 July 13 – 2006 July 19											
8	3 Delivery of the training programme												
9	3.1 Logistical arrangements (print material, organise travel and accommodation for facilitators)	2006 July 25 – 2006 July 26											
10	3.2 Instructional training programme (2 training groups of 24 participants)												
11	3.2.1 Group 1	2006 July 24 – 2006 July 28											
12	3.2.2 Group 2	2006 July 24 – 2006 July 28											
13	3.2.3 Learners prepare their PoEs	2006 August 01 – 2006 September 11											
14	3.2.4 Learner support and follow up	2006 July 31 – 2006 September 08											
15	4 Assessments												
16	4.1 Assessment of PoEs	2006 September 11 – 2006 September 29											
17	5 Final training evaluation												
18	5.1 Compilation of the final training programme evaluation report	2006 October 02 – 2006 October 04											
19	6 Presentation and project closure												
20	6.1 Documentation, presentation and project handover	2006 October 05 – 2006 October 06											

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                    Activity (45 minutes)


In your learning teams, please develop a project work plan based
       on goal and objectives that you identified above.
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(Burke, R, 1999)

PROJECT BUDGETS

	Project Name:		
Project Manager:		

Instructions:
> Enter project tasks specific to your project
> Enter budget information into the cells
> Totals are calculated automatically
>To add rows, unprotect sheet (Tools/Protection/Unprotect). Protect when done to safeguard data entry.

Project Task	Labor Hours	Labor Cost	Material Cost	Travel Cost	Other Cost	Total per Task
Project Design						
Develop Functional Specifications						
Develop System Architecture						
Develop Preliminary Design Specification						
Develop Detailed Design Specifications						
Develop Acceptance Test Plan						
Subtotal						
Project Development						
Develop Components						
Procure Software						
Procure Hardware						
Development Acceptance Test						

Risk (Contingency):						
TOTAL (scheduled):						
Comments:	**Subtotal**	**0**	**$0**	**$0**	**$0**	**$0**	**$0**
	Project Delivery						
	Install System	0	$0	$0	$0	$0	$0
	Train Customers						
	Perform Acceptance Test						
	Perform Post Project Review						
	Provide Warranty Support						
	Archive Materials						
	Subtotal						
	Project Management						
	Customer Progress Meetings/Reports						
	Internal Status Meetings/Reports						
	Third-Party Vendor Interface						
	Interface to Other Internal Departments						
	Configuration Management						
	Quality Assurance						
	Overall Project Management						
	Subtotal						
Other cost							
Sub-Totals:						

Please note that this is a template and/or a guide. You can use various formats that are more relevant for your organisation. When you are using Excel Spreadsheet, it is easier to calculate total automatically. Ask the facilitator to demonstrate this.

www.cvr-it.com/PM_Templates/**Project_Budget** Template.xls

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Activity (45 minutes)

In your learning teams, please develop a simple project budget.
You can use format that is applicable in your own organisation.
This budget should be based on the project objectives and plan
that you developed previously.

TIME MANAGEMENT

What is Time Management?

Time management is about controlling the use of your most valuable resource. What would happen if you spent your organisation's money with as few protection as you spend company time, when was the last time you scheduled a review of your time allocation?

The absence of personal time Management is characterised by last minute rushes to meet dead-lines, meetings which are either double booked or achieve nothing, days which seem somehow to slip unproductively by, crises which loom unexpected from nowhere. This sort of environment leads to inordinate stress and degradation of performance: it must be stopped.

Personal time management has many facets. Most people recognise a few, but few recognise them all – whether managers or low level staff members. There is the simple concept of keeping a well ordered diary and the related idea of planned activity. But beyond these, it is a tool for the systematic ordering of your influence on events, it underpins many other skills such as proper management of projects.

Personal time management will allow you to:
- eliminate wastage
- be prepared for unplanned meetings

- refuse excessive workloads – can you do that?
- check on project progress
- ensure that activities of a project are not neglected
- plan each day or week efficiently

Remember! Personal time management is not only a management process.

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Reflection on you understanding of the concept of time management.

Discuss what make you waste time? Is it doing work of others, no proper project plan?

What could be your solutions to the problems?

Gerard M Blair: Starting to Manage: the essential skills, *Chartwell-Bratt (UK) and the Institute of Electrical and Electronics Engineers (USA).*

MAKING A PROJECT PRESENTATION

Once you have developed your project plan with clear objectives, deliverables and budget, you are ready to present your project the management or funders. We will not address the area of presentation thoroughly – this requires a specific course. However, in order to cover aspects of the SAQA Unit Standards i.e. organise community group activities, it is essential to look at how you will communicate your project. You do not need to speak very high level English.

Project presentations whether to a community or a donor organisation should focus on the following key elements. Donor organisations in particular, will consider your project proposal primarily on the elements that will be discussed below.

Outcomes
What difference or impact we hope the project will make.

Objectives
The purpose of the project; what the project will do. The objectives of the project must be measurable. You may also need to consider the need for that project, benefits, users, will there be any income generating initiatives, etc.

Deliverables
You need to outline the specific things (products) that the project will create.

Scope

What is and isn't included in the project (users, geographical boundaries, depth and type of work)

Methodology

Here, you outline the process through which the project will be implemented. The methodology may not include timeframes.

Possible constraints

It is also important to list the things that might prevent you from achieving the intentions of that project.

Project plan

Outline project work plan (deliverables, timeframes and resources required)

COMMUNICATION SKILLS

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What is the communication process in your organisation / How do you communicate about you projects? Discuss what works and what does not work

In order to ensure project success, it is necessary to ensure that you communicate every aspect of a project.

Communication in a project is the process by which project team members share information about the project.

The importance of project communication

We have learnt that project management is a necessity for projects. We have also learnt that projects involve teams perhaps working separately on different parts of the project. In this context, clear documentation and sound communication are essential if everyone involved in the project is to work together effectively.

Communication is important because project success depends on it. Communication requires that formal and informal communication mechanisms are developed. These mechanisms facilitate the process of ensuring that there is feedback about a project.

Ineffective communication affects progress of your projects. Let's look at the barriers of effective communication. Some examples are outlined below:

- Disagreement between verbal and non-verbal messages
- Negative Self Image
- Lack of Feedback
- Lack of Motivation
- Language and vocabulary Level
- Lack of self awareness
- Selective Perception
- Unwillingness to Change

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Activity

In your teams, identify communication problems in your organisation and discuss how they could be addressed.

WRITING PROJECT REPORTS

WHY WRITE PROJECT REPORT

A project report is normally an "internal" document that results from an investigation of a project. Also, daily, weekly, monthly, or annual reports are prepared to give feedback on the results that have been achieved by the project against the original project objectives.

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Reflection

What other reports may e required n your organisation>

It is important to check who the tended readers of your project report are?

Readers of reports are normally people higher up in the management positions, decision makers or funders in or associated with the project. It is necessary to consider the following in formulating a report.

- What would be the content of the report – in other word, what will the report include?   How technical or specialised is the subject

matter of the report relative to the knowledge and understanding of the reader?

- How much time is the person likely to have available to read my report?

- What response would you like to receive from the reader?

Answers to these questions will help you to write a report which is focused, to the point, readable and interesting, and which results in a common understanding and appropriate response.

STRUCTURE OF PROJECT REPORTS

A simple project report structure is presented below:
- Executive summary
- Introduction
- Purpose
- Approach followed
- Findings
- Discussion of findings
- Conclusions
- Lessons for future projects / recommendations
- Appendixes (questionnaire, etc.)

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Lessons learnt?

LAYOUT OF A PROJECT REPORT

The following is a useful general layout of a report:

- Title of the Report
- Executive Summary
  - o An executive summary presents key issues that you covered in your entire report. In general, you would include, the purpose of your report, your problem statement, your objectives, key methods you used, your key findings (strengths, weaknesses, root causes, etc.), key recommendations, (the amount of money you are requesting if you are writing a funding proposal) in an executive summary.
  - o You would generally write up your executive summary after you have completed writing your report, because this is the easiest way of being able to select the key points that you have covered in your entire report.

- **Introduction**
  - The Introduction should give people an overall sense of what this report is about, by doing the following:
  - o **Purpose:** state the main intention of the report. For example, to evaluate, to monitor progress, to investigate, to explore, etc.
  - o **Outline of the report**: explain how the report will be structured. For example, the report will (i) explain the central problem that will be addressed, ii) identify the objectives that will be used to measure progress iii) outline the methods used to collect the information iv) critically assess the extent to which the project met the objectives v) provide recommendations to address the causes of the problems identified.

- **Problem Statement**
  - o A problem statement states the problem in a focused and clear way.
  - o Indicate in few paragraphs why it is so important to focus on this problem.

- **Background to the Problem / Issue / Project**
  - o Explain how the project came up.
  - o In other words, explain the process that took place prior to the issue that might have brought about the need for the project.

- **Objectives**
  - o If your report involves assessing "success", "effectiveness", efficiency", etc. you must have objectives against which to measure performance. Therefore reports should have SMART objectives or performance indicators.
  - o Remember! SMART objectives should be: Specific; Measurable; Achievable: Realistic; Time-bound.
  - o Objectives will assist you to assess whether your project has been successfully delivered; whether you have made significant progress; whether the money that you have allocated for the project has been used appropriately, etc.

- **Findings**
  - o This section would most likely be made up of several sub-headings. This section would contain most of the information in your report. In this section, you would explain the progress that has been made based on the objectives, etc.
  - o You might want to include tables, graphs, pie charts, etc. to illustrate your points graphically. Only include information that is relevant, otherwise include it as an appendix.

- **Conclusions**
  - o This is an optional section. You could draw certain conclusions based on the evaluation of the project, or your investigation, etc.
  - o Conclusions would be based on all your findings, where you could conclude that, "the reason for not being able to meet your objectives is because the process of communication between the Project Leader and the Project Team broke

down. The project team members held a different understanding to the project leader, which was not checked", etc.

- **Recommendations**
  - o Make recommendations based on the causes of the problems.
  - o Recommendations should be practical, realistic and achievable.
  - o Depending on the nature of the report, include time frames and if necessary who should be responsible for implementing the recommendations.

- **Appendixes**
  - o Any additional and relevant information that does not belong to the main report should be attached as an annexure or appendix.
  - o Make sure all appendices are numbered and carry a title at the top.

- **Follow Up**

Reports are written with a purpose - which is normally to keep the interest or momentum in the organisation at a high level, or to bring about improvement. So, it is essential to always follow up with the readers after submitting a report to ensure the purpose for which the report was written is achieved.

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McNamara C, (2005) <u>Field Guide to Consulting and Organizational Development: Collaborative and Systems Approach to Performance Change and Leadership</u>, Authenticity Consulting, LLC.

<u>Project Budget Template:</u>
 <u>http://www.cvr-it.com/PM_Templates/Project_Budget_Template.xls</u>