Manage Projects
Handbook

INTRODUCTION

Welcome to *Manage Projects.* In this unit you will learn about the project management cycle, the role of a project manager and risk and change management. Through practical application of a project of your choice, you will develop skills to define and develop a project plan, administer and monitor a project, finalise and review a project.

 The Elements of Competency for this unit are:
- Define Project
- Develop project plan
- Administer and monitor project

- Finalise project
- Review project

There are many different frameworks for project management. Below you will find some basic suggestions of a template and key sections you may like to include in any project plan. You can then adapt these sections to a grant or any other requirements you may have.

Project Plan template
1- Project Name:

2- Rationale for the project:
Note: this requires you to define why this project is necessary & important, so provide background information about the issue/ need; the causes of the issue and briefly explain how this project would address this issue. Use activity 5 to help you.

3- Knowledge and assessment of related work in the area & important strategic alliances:
Note: this section is about you demonstrating that you have done research into the type of support/ programs that are being provided around the issue you have chosen which may include work done by other services/ communities or government is doing work in the area; if there are similar projects; what is working well, the gaps in services/programs. This section also requires you to identify who the key stakeholders are who you can partner with to deliver the project. You must note consultation that you had with stakeholders in this section. Use & insert activity 5.

4- Goals, Objectives and Outcomes of project:
Note: this section is about you clearly stating what the project aims to achieve. Use activity 6 to help you in this section.
5- Monitoring and evaluation strategy:
Note: You need to insert a completed evaluation and monitoring plan- use activity 11 and template provided.

6- Approach and key stages of the program:
Note: Discuss if this project is a pilot project; will it use action research? Will it be a community development approach? Insert Action Plan template in this section

7- Benefits of the program:
Note: In this section you need to paint a picture about the impact this project will make to the community/ group; to your and other agencies etc. This is where you sell the project and why it is so important

8- Critical success factors:
Note: In this section you need to discuss what environment and other factors need to be present for the project to be a success? Discuss change/ contingency plans in this section.

9- Key assumptions and risks:

Note: Insert completed Risk Register template.

10- Budget:
Note: This is a critical part of the project plan. Use quotes and accurate figures and always check that the budget adds up.

RESOURCES AND OPTIONAL READINGS:

Zivets, L., (2003), Ch. 5 "Partnership and Planning the Project", in Project Identification, Design and Appraisal: A manual for NGO's, Australian Council for Overseas AID (now ACFID), Canberra, pp. 45-51.

Dwyer, J., Stanton, P. and Thiessen, V., (2004), Ch 6 "The Implementation Phase: Carrying out the Plan", in Project Management in Health and Community Services: Getting Good Ideas to Work, Allen & Unwin, Sydney, pp132-163.

Baccarini, D., (1999), " The Logical Framework Method for Defining Project Success", Project Management Journal, 30 (4), pp 25-32.

Broughton, B. and Hampshire, J., (1996), Ch 2 " Principles of Monitoring, Review and Evaluation", in Bridging the Gap: A Guide to Monitoring and Evaluating Development Projects, Australian Council for Overseas Aid (now ACFID), Canberra, pp. 19-27.

Ellis, P., (2004), "Ten Points for Better Monitoring and Evaluation", Development Bulletin, 65 (August), pp 68-71.

Gosling, L. and Edwards, M., (1995) Ch 3 "Recognize and Deal with Differences and Discrimination", in Toolkits: A practical guide to assessment, monitoring, review and evaluation, Save the Children, London, pp. 28-38.
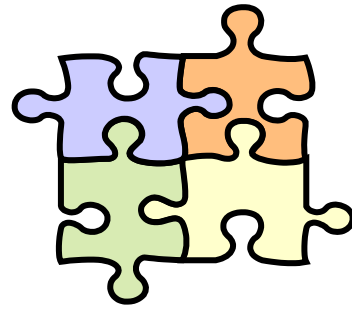

Further information available at:

Australian Institute of Project Management: www.aipm.com.au/html/

The Project Management Institute Australian Chapters: www.pmichapters-australia.org.au/home.asp

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WHAT IS PROJECT MANAGEMENT?

Definitions of a Project

A project is defined by a collection of inter- related activities that are required to achieve a goal. Projects are time bound and have an allocated budget.

In the community development and services industry, projects aim to address very specific and clear needs as well as goals and include detailed outcomes (end results).

A characteristic of projects is that they have multiple stakeholders (individuals, groups and agencies who have an interest in the project) as well as resources.

For example: A new project is created after speaking to numerous individuals from the community (young mums, young dads, maternity health workers, DHS etc) who all identify a gap in support provided to young fathers. A number of stakeholders who have an interest in this area may work together to define the issue and needs and clarify why they think the gap exists, what is already available (why this is not working), and agree on what is the desired end goal. If they worked in partnership one of the agencies would then secure funding to trial this project.

In this instance- the new project created is an action research pilot which aims to conduct research into why young fathers do not participate in postnatal classes and find out the type of support they would engage in. This project aims to consult and work with young fathers and trial a new 'young dad's' group for one year and write up and share the results.

-This project goal is to learn more about this issue and trial a proposed new young father's peer to peer support group
-The project is a one-year trial with an aim to advocate for agencies to pick up the model and deliver this service if the project is successful
-A range of different agencies, participants, community groups are all involved in this trial project and will be allocated various roles and will provide resources to contribute to the project

Projects are different from daily work tasks such as one on one client contact, emails etc as these are stand-alone activities. Projects are also temporary which means that they have start and end dates for numerous activities to be completed to achieve the end outcomes.

What is Project Management?

Projects such as the example provided are made up of set of tasks which various people need to complete. A project manger keeps track and controls the project to ensure that everyone involved is accountable and things get done.

Management of a project requires the project manager to plan, organise, lead and monitor these tasks and a team to ensure that things get done and the project can be a success. Management of projects is important particularly because in life things don't always go ahead as we think they will. A manger will need to think of potential risks and come up with contingency plans and ensure these are put in place as necessary.

Role of the Project Manager

The project manager is the key to a successful project. Their responsibilities include:
- o Planning the project
- o Communicating regularly with all stakeholders
- o Monitoring the project's progress
- o Handling any difficulties that arise
- o Preparing reports as required
- o Ensuring team members work cooperatively
- o Making or facilitating multiple people to make decisions

Skills of an experienced project manager

- o Verbal and written communication skills, including ability to develop successful grant submissions and community action plans
- o Ability to network and to nurture internal and external relationships through promotion of cooperation and partnership
- o Ability to guide, mentor and develop others
- o Ability to respond flexibly to stakeholder needs and changing circumstances
- o Project and staff management, including financials
- o Ability to harnesses information and opportunities
- o Good judgment and commonsense
- o Commitment to taking action to ensure sustainability
- o Ability to perform in times of uncertainty, whilst supporting and implementing change
- o Strong research and analysis skills
- o Ability to use project management planning tools

Activity 1:

Brainstorm how you could use project management or the skills of a project manager in your daily life as well as in your work context.

For example, in my daily life I used project management skills to build a fence. Professionally, I shared my knowledge and skills of project management with a refugee community and helped them plan a 'learning to drive' project which will help isolated women get their license and be able to get around to shops, their schools and find potential work.

How can you use project management skills, tools in your personal and work life
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Project management in the community development sector requires a manager to be familiar with action research which share the same principles of planning, reflection, learning from actions and altering course. As you will note in the diagram below- project management is an ongoing process and cycle directed by reflection and learning.

Project Management Cycle

Consultations with key stakeholders, risk and change management should occur in all stages

Legislation & codes of practice (including OH &S) should be included in design of project

Implementation is the 'doing' phase where key activities occur.

(re) design project plan

Implement

Reflect

Monitor

Evaluate

Monitoring of outputs & activities is ongoing through the cycle

You evaluate project outcomes, impact & sustainability through:

- o   Measuring overall performance of forecast vs actual outputs/ activities
- o   Assessment of context/ need of project, feasibility of design & delivery
- o   Monitoring & implementation and project cost efficiency)

Activity 2: You have been selected to manage Judy's fence project. List all the activities that need to take place in their order of priority and identify the project management stages

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THE PLANNING & DESIGN STAGE

'If you fail to plan, you plan to fail'

Why is it important to plan?

Planning is useful for a number of reasons, including helping you to:

o Prepare for future activities and understand which are priorities for community groups and your organisation

o Identify issues and needs and the importance these being addressed

o Understand all required resources, time and activities that a project needs and whether it is achievable

o Develop clear goals and way forward

o Motivate a number of different stakeholders to participate in numerous activities to achieve a bigger goal

o Knowing what actions need to happen, by whom and making sure that you can follow up and make things happen

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Activity 3: Think of an example of when things have gone wrong because there was no planning done. What happened? Why did things go wrong and what were the consequences?

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The scope (definition) of the project

The project manager and team members should conduct scoping exercises to develop a project brief. This is a formal document that includes the:
- o   Purpose, objectives and desired outcomes
- o   Stakeholders and their roles and responsibilities
- o   Standards expected
- o   Resources allocated or available
- o   Time lines and progress points
- o   Payment schedule and conditions
- o   Copyright conditions/ownership of materials produced
- o   Indemnity and insurance
- o   Contingency plans.

Whilst this sounds like a big job, it can be broken down into a number of smaller steps, which will in the end, provide you with the information you need for articulating the scope of the project in a project plan.

STEP 1: NEEDS IDENTIFICATION AND ANALYSIS

The first step is for you to identify an idea for a project. This often comes out of:
- o   Seeing a gap of service / activities;
- o   Feedback or consultation from community groups;
- o   Improvements to existing projects or a new and innovative approach or activity

Once you have an idea you have to analyse the issue/ need.

Remember that any needs identification and project development should be done by or in **consultation with the community** group or individuals that are impacted. This takes time, but is essential to ensure that projects have genuine benefit for those that we work with. Community leaders and representatives should be involved in the decision making process at all stages of the project cycle.

Read the following articles from your reader: 'Partnership and Planning Projects'; 'Disappointments of participation: Finding the correct role for community participation' and 'Recognise and deal with differences and discrimination'

Activity: Why is it essential to ensure in depth consultation and participation by community in the project cycle?

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Tools available to assist with identification of needs and solutions

A number of planning tools are available to assist with planning and the consultation process. You can access these invaluable tools at:

VSO (2009) ' *Participatory Approaches: A facilitators guide: Tools*'; VSO International, London.
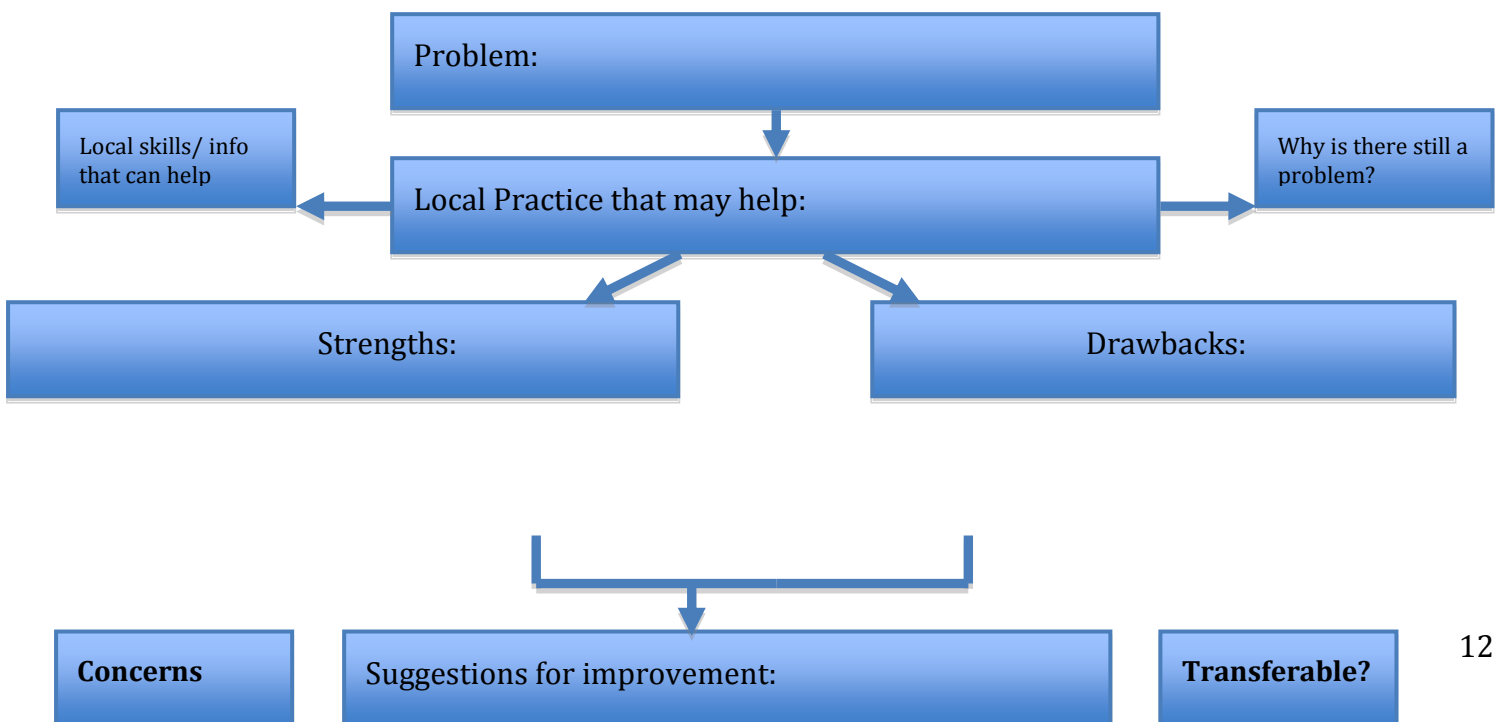
In particular you can use the following:

Fishbone Diagram Tool

Involve the community to identify the problem and then explore the causes. This will assist the community to ask questions why a particular problem exists in the fist place and what influences contribute to the problem. By conducting the fishbone analysis it will help you to understand the problem and then this will allow you to be clear in what needs to happen to resolve the issue. By examining the root cause of the problem, you are planning for your project to provide a holistic solution rather than a 'band aid fix'.
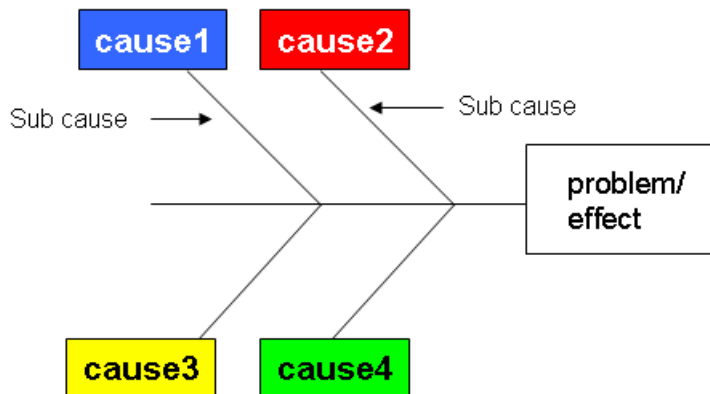
You can also use the Local Solutions tool:

Once a problem has been identified, you can use this tool to understand community strengths and barriers for addressing this issue. This allows for a worker to understand type of support required and how partners can be involved.

Activity 5: Identify and analyse an issue/ need to prepare for defining your project
Use the tools just described to articulate and analyse the issue/ need for a project.
You need to conduct the relevant research to understand relevant work in the area.
If you are more comfortable brainstorming and doing some research rather than using the tools,
below are some questions to help you get started

o What is currently taking place?
o What is missing?
o What should be in place of what is happening?
o Who is there to help? Where to start defining the problem/ solution?
o What are the priorities?
o Who is best placed to respond to this and with what authority?
o What is the environment where the project will take place (background, context, culture, views)?
o What level of development is the community/ participant at?
o What is the relevant legislation that impacts this project? (For example anti-discrimination
   legislation; codes of practice and ethical principles; privacy laws; occupational health and safety
   laws; environmental legislation.

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STEP 2: DEFINE THE PROJECT

Now that you have a good understanding of the need/ issue - it is time to work with the community and/ or those that the project will impact to identify what the goal of your project will be.

The previous activity shoud have given you an insight into how complex and large some issues and needs are. It is important that you discuss and think about which aspect/s of this issues your project will try to address. How much funding, time and engergy or other things alrady happening in the sector to address this need will influence the type of project that is developed.

For example, if you wanted to address the gap between indiginous and non indiginous communities, you would need to specify an area of focus. You will not be able to solve the wide range of inequalities with one project, but you could certainly focus on one area and make a big difference. For example- by being specific, my project could work with a remote indiginous community and organise transportation to access basic services. In this instance the project could work with the community to secure a small community bus for use as required.

At this point you should brainstorm different ways of addressing the issue at hand. Remember- there are many roads that lead to Rome. Similarly there are many ways to address community needs. The response selected needs to be suitable to the community and or organisation. Be mindful of groups and oranisations capacity to commit, deliver and be accountable for the project.

Useful terms and definitions you need to know to get started

As with most things in life- project management has new language that you will have to become familiar with. Below are some of terms and definitions of project management.

The Goal should describe in one or two statements why you are doing a project. These statements need to be specific and narrow enough to define the project whilst clearly communicating the aim and the expected long-term results. The goal should place the project in wider context.
Eg: Increasing access to driving programs for isolated youth living in Broadmeadows

The Objectives provide further and more specific details about how the goal will be achieved. Often it can be used without reference to a goal and in this instance, will provide information about what the project will achieve.
Eg: Provide opportunity for youth to gain an understanding of Victorian road rules

Outputs are the specific results of actions, which are often used by participants to achieve the outcomes (benefits/ results) desired in the project. Outputs are planned activities by the project manager to ensure that the objectives can be reached.
Eg: 5 workshops to be held, 20 youth involved over a 2 week period over the school holidays.

Outcomes refer to the expected benefits and effects of program outputs.
Eg:
o the *quantitative outcome* describes the effects that can be measured such as 18 out of the 20 youth got their learner's driver's license.
o The *qualitative outcome* describes the benefits/ results of participation and potentially increased confidence, health etc. In this example, an increased confidence and mobility which leads to greater social connection and ability to access services, educational and employment.

Read the first two articles in your reader: 'Project Management Fact Sheet: Language Matters and Managing small projects.
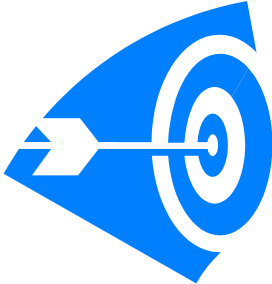
Activity 6: Now that you have identified the problem or issue you would like to resolve. Come up with a new project that you can use for your assessment.

Goals	Objectives	Outputs	Outcomes
1			
2			
3			
etc			

Before you proceed- you now need to consult and decide if this project aligns with your organisational vision and objectives

- o This means that you need to consider and ask appropriate authority if this project is a priority and if there is commitment from the organisation to allocate resources to it (time, money etc).

- o You also need to analyse if your organisation is most experienced and best placed to respond to this particular need. If not- you can advocate on behalf of the community for another better placed agency to take on the project, which you can partner on.

STEP 3: PROJECT DESIGN

STAKEHOLDER ANALYSIS

Who are the key stakeholders; why; and how should they be engaged.
What role should they play; what are their key objectives and requirements?

Project stakeholders are people or groups who have an interest or stake in a project and its outcomes. They are often people who are impacted by activities of the project or those who can influence the impact of an activity. Stakeholders may be:

- o Internal and/or external groups or individual who are relying on the project to deliver certain outcomes
- o Funding bodies
- o People or groups who may provide resources, time, support or expertise
- o Managers or staff who have special responsibilities in context of the project
- o Community leaders & members, clients, customers and other groups such as suppliers.

Often stakeholder groups include:

- o Project sponsors instigate (or pay for the project). They may also be senior managers within an organisation who are affected by its outcome. They should be a single point of reference for supervisory decisions for the project manager. They also require to receive regular reports in their preferred format.

- o Project managers are responsible to ensure that planning, implementing, monitoring and evaluating of the project take place. Their role is to see that the team and tasks are all completed and a range of stakeholders is managed. They are responsible for reporting and controlling the project.

- o Managers and project team members include other staff from the organisation who have a role of supervising, or have responsibility for various tasks within the project.

- o Community or consumers include individuals or groups who are the recipients of the project but that should also be involved in decision-making as well as throughout all stages of the project cycle. Note you need to analyse who in the community will be involved. Will there be any winners and looser as a result?

- o Funding bodies are groups or individuals who provide money to fund the operation of the project. There are both internal funding bodies such as departments or managers who have allocated budget for the project or external funding bodies which can include industry bodies, philanthropists, government departments, shareholders, other businesses or private investors.

- o Steering committees or reference groups are a group of people with expertise and experience who guide and support the project manager in achieving the project's goals. They may be from within the organisation or from an outside group.

- o Other organisations who have an interest in the project who may provide resources, time, support

Why conduct a stakeholder analysis?

This is a useful tool that helps:

- o Improve our understanding of the needs of those affected by a problem

- o Involve those who are impacted to participate in project design and to inform us of a more accurate version of the issue, environment, culture and other factors

- o Reveal if the project will have any negative impacts on the community or other groups. This includes sub groups of a community who may have competing interests. For example- youth and elderly.

When conducting a stakeholder analysis- please consider:

o Are there any conflicts between various stakeholders' interest and goals? (in particular it is important to review this to ensure that the project is in the best interests of the community)

o Are there power imbalances across various stakeholders? (eg: community vs the donor?)

o Stakeholder needs may change over time. How will you ensure that you have a good relationship with stakeholders and are able put in place a framework to be able to monitor changing interests

o How you will provide clear direction and communicate with others about which issues stakeholders expect to be involved in?

o How you will keep the community as well as other stakeholders involved in the decision making process and keep them accountable throughout the project cycle?

o How will you not only involve but also empower and build capacity of the community? Note the below diagram to get you started in thinking through this question.

QuickTime™ and a
decompressor
are needed to see this picture.

Seeking approval for projects

Often before a project gets funding the project manager is required to seek authority for project parameters from their organisational management. This includes sitting down and discussing as well as showing project planning documentation to senior management. Once things are approved, project proposals can be put forward to funding bodies. Organisational management often wants to be involved in various steps of projects, and it is your duty to become familiar with their expectations and your level of authority in making decisions.

Documentation

Managing stakeholder interests is a key part of project management. Internal and external stakeholders need to be consulted, cooperated with and understood at each stage. To ensure that a range of stakeholders come to a common agreement, it may be necessary to prepare a formal, legally binding project contract.

This should include the:
- o Responsibilities of all parties
- o Lines of accountability
- o Project goal
- o Fees, payment, budget
- o Specific clauses outlining terms and conditions
- o Milestones and time lines
- o Required standards
- o Specific clauses relating to the project.

There are also less formal and simplified forms of contract such as:

A memorandum of understanding (MoU) which is a more basic and briefer document that:
- o Is used between major partners (across agencies & communities) and;
- o Outlines the conditions and parameters of a project
- o Defines the broad principles and guidelines for the working arrangement
- o Clarifies the key roles and responsibilities.

A terms of reference document is a short, clear and a formal guide for a steering committee or reference group which includes:
  o The reason for the project
  o The parties involved and their roles and responsibilities
  o The scope of the project
  o The structure of the project
  o A meeting schedule for the steering committee
  o How the steering committee will function
  o Communication protocols between the steering committee and the project team
  o How difficulties will be managed.

Activity 7: Stakeholder analysis and development of a communication plan

Consider the project you have identified and conduct a stakeholder analysis plan.
Use this template, which is in your reader and to detail the expectations and requirements of each stakeholder.

Stakeholder	Name/role of key contact	Contact details	Expectations & Communication requirement	Communication channel (eg-media, report, face to face etc)	Time frame/s
Eg: Funding Body	John Smith: Manager	Ph\ Mob: Email: Address:	Regular updates/ reports especially of changes to progress and project plan Information about any media about the project Invitation to events etc	Meetings and reports 3 x year Verbal and written invitation to events Ph conversation re questions that come up ect.	31st Jan 2011 25th June 2011 1st Dec 2011

ACTION PLANNING

What are the activities and resources that need to take place to get this project done?

- Define each task as clearly as possible as this will give you more information about the type of resources and timeframes that are required for this project.

- Ask yourself what you need to know in order to get this task done

- Make sure that when defining a task you are clear about what needs to happen, who needs to do it, what you want the end result to be and the timeframes required. Whilst you are developing your skills as a project manager- it is useful to get someone who does not know anything about the project to read over the list of tasks to see if they are clear on requirements- if not, further detail/ greater clarification may be necessary.

- Remember- keep it simple, short and clear

- Consider the different types of resources required for projects such as human resources (staff and volunteers); technological and information requirements; raw materials; funding etc. The amount of resources available to the project may be based on:
  - How much the organisation wants to allocate to the project or can source from external funding bodies
  - What the project goals and time frames suggest
  - The total budget estimate and resource allocation responsibilities within the budget.

- Make sure that you consider the legislation & codes of practice that are relevant to your project (eg: OH &S). Also research your organizational policy and procedures that are relevant to your project.

Activity 8: Defining the task

List the main tasks that are necessary for you to make your project happen, and under each main task, define specifically the steps that you need to take to achieve this.

For example: One of the main tasks of a fundraiser may be to organise the dinner. To be able to do this I first need to confirm RSVP numbers, dietary requirements, confirm budget for dinner & if this includes drinks, determine if dinner will be cooked on site or delivered etc.

What are the tasks/ activities that need to take place to make your project happen?

Use the Action Plan template (provided in your reader) to document this activity

Now that you have listed out all the steps involved in each task- consider what resources are required to make these things happen.

RISK MANAGEMENT

Even the best plans can have things go wrong. Anticipating some of the potential problems or risks could mean that you could avoid them. In other instances, when risks are unavoidable- you can plan contingencies (plan B) to ensure that the project can still happen.

In planning out a project it is important to conduct a risk assessment. This involves:

- identifying risks and potential hazards by asking what could go wrong with the plan/ what assumptions have we made?

- evaluating the level of risk by identifying the likelihood of things going wrong as well as the degree of consequences (low risk vs high risk which may impact whole project)

- developing management plans for risks by identifying how the risk can be reduced or eliminated

Why do it?

If you do not consider risks, the consequences may be so large that the project is not successful. In other instances, risks are not so large, but when they are not managed they can escalate.

Risks can have impact on staff and community welfare and safety. Others include spending more money than you have for the project, or taking longer to complete it than was specified (which also costs money in wages etc).

Other common risks are not having consulted enough with community and stakeholders which may mean that you do not have enough research on the issue which in turn will have negative impact on how you define the problem and solution. Lack of consultation can also lead to developing projects which are not a priority for the community and as a result there is little or no participation. The impact of this is that your scope may be too broad and not address the real cause of the issue.

People and projects exist in a broader environment, which means that you cannot always control every external factor. Thinking and planning for some of the more common risks can make the difference between a successful and failed project.

Risk management requires ongoing and sometimes creative measures that may need to be adapted depending on the situation.

Ensure that risk management is not the sole responsibility of the project manager but also involves other stakeholders

Activity 9: Use the below tool to identify and assess risks in your project.

Identification	Assessment & Analysis			Management		Monitoring
Risk event (What is likely to go wrong?)	**Probability** (How likely is it to happen?)	**Consequence** (What are the implications of this happening?)	**Priority** (How important is it to deal with this?)	**Response Strategies** (What can I do to prevent/ eliminate risk?)	**Accountability** (Who is responsible for actions?)	**Review** (When will you check things are still ok?)

Source: Hartley, S. (2009) ' Apendix 4- Project Management templates' from Project Management- principles, process, and practices, Pearson Education Australia, p 368

OTHER USEFUL PROJECT MANAGEMENT TOOLS

Project management tools are designed to assist you to plan out your project and keep track of information that is key to making the project happen.

Some of these tools will require you to work with others in the planning phase. In most instances the information gathered in these tools may be shared with funding body, communities, management and other key partners in the project.

The type of tools you use will depend on the size of your project as well as your organisational requirements.

Note that spreadsheets can be used to plan and track almost any aspect of the project and are often used for small or simple projects.

1- Gantt and bar charts

These are ideal for simple or short projects. They illustrate tasks against time, and map tasks in consideration of other dependencies

From your reader review: 'Project Management Fact Sheet: 'Developing a Gantt Chart'
This will provide step-by-step information on how to develop a Gantt Chart.

You can view how Gantt charts are created online. Go to the following links for some examples.
http://www.youtube.com/watch?v=dYNKz1_pnzg&feature=related

(Although this demonstration if for particular software, you can develop similar templates easily in Excel word. **A basic template titled 'Action Plan' is available for you to use for your assessment and can be found in the template section of your reader.**

http://www.youtube.com/watch?v=PMkWX6MdSWw&feature=related

2- The Logical Framework (log frames)

This is a tool to help strengthen project design, implementation and evaluation. It comes in varied structures but aims to provide an overview of the project and to show the project logically. The benefits of using this tool are, it:
- Helps workers to organise their thinking logically
- Shows weaknesses and gaps in the project design
- Helps summarise the project which can in turn be used as a tool to communicate to others

	Summary	Indicators	Evidence	Assumptions
Goal				
Purpose				
Outputs				
Activities				

Take time to read article ' The logical Framework Method for Defining Project Success which is in your reader.

3- Critical Path method is a tool that:

- Assists the project manager to order tasks according to the dependencies and time taken
- Shows you key activities/ tasks in terms of their impact on the whole project
- Shows you which tasks can be ran concurrently and which must be done in succession
- Shows you best way to schedule tasks within the set timeframe
- Identifies slack time around tasks which are not on the critical pathway which allows you to schedule these during less busy times

4- Cost Schedule control system is a tool which:

- Is used to plan, control, monitor and report on costs for a project
- Helps control the budget at all stages of the project, which is the responsibility of the project manager
- Allows you to assign and modify costs through the project

For small projects creating a spreadsheet to track your budget is sufficient.

Item	Forecasted budget	Spent to date	Remaining funds

PREPARING THE BUDGET

Now that you have identified the required activities, resources, timeframes and risks of the project- it is time to develop the budget.

There is a fact sheet available in your reader that will step you through how to create a budget for a project.

Here are the main things you should remember:

- o To develop your budget, think of the project step by step not to omit any possible expenses
- o Make sure that volunteer work and in- kind donations are mentioned and calculated both in the income and expenditure
- o Detail expenses to show that you have thought about it. Eg: Rather than just noting transport costs, be specific and details exact amounts required for fuel, the driver, bus etc.
- o When developing your budget, make sure this is done in consultation with your team, specialists and other relevant departments
- o Get quotes and do your research- never just estimate costs
- o An effective budget requires you to research and account for all associated costs with on time, standard completion of each activity identified in the project
- o You must get your budget and final project approved by relevant management / senior management in your company. Most companies will have a document outlining reporting and signatory requirement. Make sure you allow enough time for this to take place (up to two weeks or more)- especially if you are submitting a funding application
- o The money coming in and money being spent for the project need to add up
- o Always double check the budget and re do calculations

Activity 10: Complete a budget for your project

Income		Expenditure	
Description	**$**	**Description**	**$**
Eg: In kind time by volunteers ($20 x 5hr x 4 volunteers)	$400	Eg: Transport Fuel $100 Driver $250 Subsidised bus (25 seater x 2) $400	$750
Total Income	**$**	**Total Expenditure**	**$**

PLANNING FOR MONITORING AND EVALUATION

Monitoring and evaluation is something that you need to think about in the planning stage so that you have clear tools and measures in place to know what you are tracking and how successfully you are progressing against your objectives. This information is also necessary at the end of the project to check if you have reached your outputs.

These plans also help ensure that you stay focused and collect the right type of information along the way to ensure that you achieve what was set out and agreed at the beginning of the project by various stakeholders and can also evaluate this has happened.

In the planning stage- decide on what will define a successful project

Will it be judged by:
1/ Key stakeholders and the project manager;
2/ By number and level of outcomes achieved as set out in the plan
3/ Measurement of collective actions and innovative solutions within an action research framework of reflection, learning and continuous improvement

Once you have made these decisions in partnership with appropriate stakeholders, it is time to start thinking and planning the monitoring and evaluation plan. You can use the template provided below or if you prefer, you can use the log frame tool shared with you earlier in this hand book.

An example of a monitoring and evaluation template

Goal/ Objectives	Outcomes	Evaluation tools	Measures	Time-lines
Goal: Increasing employment outcomes for youth in Broadmeadows Objectives -Increase understanding of how the employment sector works and support programs available -To provide culturally appropriate job readiness training -Linking youth to additional support services as required	Increased interest and understanding of employment sector Increased participation in training Participant linked to work placement/ job	Project feedback documentation from participants, Job Services Networks -Stakeholder interviews (for benchmark) -Open ended questions during individual meetings -Exit surveys -Referral forms -Data collected as part of the training session	Number of participants involved in the project Job or work placement outcomes Extent of involvement in job readiness training Change of awareness in employment sector Trends in interest from local employers Number of referrals to support services	March 2011 June 2011 Oct 2011 Early Dec 2011

Activity 11: Complete a monitoring and evaluation plan for your project

Goal/ Objectives	Outcomes	Evaluation tools	Measures	Timelines
Goal: Objectives				

PROJECT IMPLEMENTATION PHASE

This is the doing phase where you carry out all activities and the manager makes sure that you stick to the plan

This is also the time where the project manager does the following:

- o Manages stakeholder (use communication plan to guide you)
- o Manage change
- o Manages the team (community, volunteers, other staff)
- o Gets the team to commit to the project and ensure everyone knows their role
- o Support team to maintain quality and process through coaching, mentoring, training and supervision
- o Provide regular feedback and positive reinforcement where required
- o Communicates clear timeframes, and reporting structures
- o Holds regular team meetings
- o Problem solves by identifying and responding to emerging team and project issues
- o Controls the project scope, schedule and budget
- o Manages quality and risks
- o Completing project reports (tracking progress against targets)

Not all projects are large enough to have a team, however for the projects which are large and have either paid staff or volunteers (from the organisation or the community), the project manager must ensure that team members are clear about their role. The best way to do this is to create a position description for each person which:
- o List key tasks and responsibilities
- o Has key performance indicators
- o Details the lines of reporting and liaison

The project manager must ensure that team members are committed to the project by:
- o Developing a set of standards governing team behaviour
- o Defining expected work standards
- o Asking team members to sign a document indicating they have understood the project objectives and their responsibilities.

In project where there is a team, a large part of responsibilities of the project manager role is to support team members and help them execute their assigned tasks. This is particularly important when dealing with team members:

- o Who are inexperienced in project requirements
- o With responsibilities in addition to their project role
- o With physical or other impairments
- o Time critical projects.

Strategies for supporting team members include:

- o Supervision
- o Mentoring
- o Coaching
- o Providing feedback
- o Providing encouragement
- o Providing additional resources.

Project managers may identify training requirements when choosing or meeting their team members. Project-specific training costs should be included in the project budget.

Providing learning and development opportunities helps team members complete their work and - motivates team members.

A project manager working with communities should ensure that they too receive appropriate training, mentoring and support.

Ensure that you never assume you understand anyone's level of skills irrespective of their qualifications. A good way to assess if someone is familiar with how to do a task is for you to ask him or her to describe how they will be undertaking certain activities. If gaps emerge in knowledge or skill- offer appropriate support.

Communication tools used throughout the project may include:

- o An organisational chart for the project
- o A team noticeboard, either in a central area or on a company intranet
- o Regular meetings and discussions with stakeholders
- o Team or stakeholder newsletters
- o Emails, letters, phone calls, website etc.

Documentation

You and other team members must keep accurate and up to date records for accountability purposes.
Examples of documentation include:
- o Minutes
- o Financial records
- o Correspondence
- o Memorandum of Understanding (MoU) and other agreements
- o Feedback from community
- o Project promotion
- o Photos that can be used for reports, to give to participants etc.

MANAGING CHANGE

Consider how you respond to change… Are you someone who likes routine and stability or are you quite happy to adapt to a situation as you go and are exited when things are different?

The reality is that we can be excited by good change (winning lotto) even if we are normally someone who likes routine. Overall, people have different preferences and reactions to change- but if not managed properly most people will not immediately deal with it well.

In your reader, Annie Riches describes the four emotional stages of change as:

1. Disbelief and denial
2. Anger and blame
3. Reluctant acceptance
4. Commitment

Activity 11: Take a moment to read Riches article.

When changed has occurred in your life- have you gone through these stages?

Note down some of the potential negative impacts that can occur in a project as a result of change

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There are instances when change is created as a result of dissatisfaction with the way something is at a given point in time. Other times, changes happen because of the external environment. Either way, project managers need to be mindful of managing change.

Make sure that you consult people who are impacted by change and promote open feedback channels. Ensuring regular communication about change will positively impact people's performance and morale. Riches also recommend giving people enough notice and information about the change so that they understand how to prepare themselves. She also notes that people need to be listened to and acknowledged when they are displaying resistance- check why people are resistant, is this due to lack of training, concern over increased work load etc. Most people will move through these stages of change quicker the more they understand the positives of change.

Before implementing change in the project/ team, consider if it is necessary by asking:

- o What is the dissatisfaction with?
- o What did it look like before?
- o What do suggested changes look like after?
- o Why Change it?
- o Who does it impact and how much resistance will there be?
- o What is the probability of this happening?
- o How will it improve workplace/ project?

Read Dwyer's article 'Implementation phase: Carrying out the plan' which can be found in your reader.

REFLECTION, MONITORING AND EVALUATION
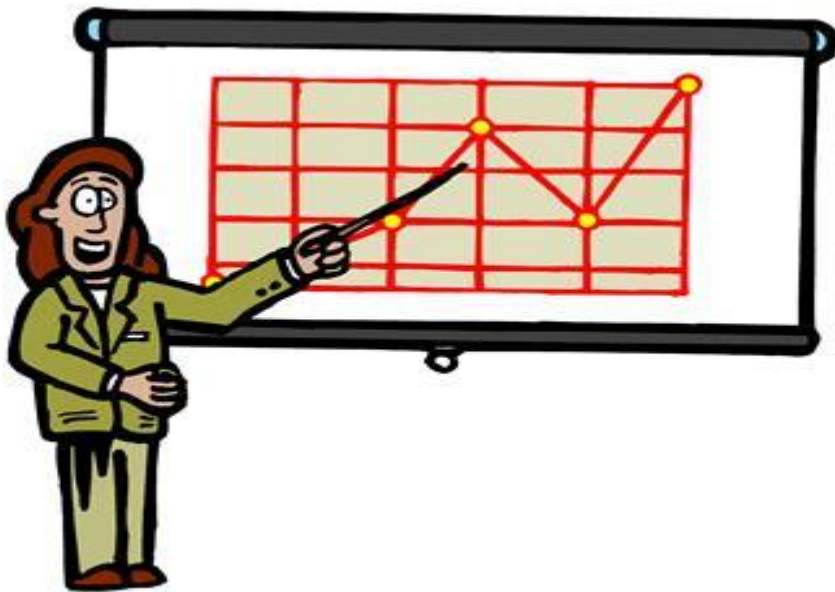
There are a number of main reasons for monitoring and measuring our performance – these are:

- o   Being accountable for doing what we say we will do
- o   Using resources as we committed to use them
- o   To learn and continuously improve our practice in this project and others

Administering and monitoring the project involves:

- o   Ensuring team members understand their responsibilities
- o   Supporting the team to ensure quality results
- o   Establishing and maintaining records
- o   Implementing and monitoring finances and records
- o   Completing project reports
- o   Undertaking risk management
- o   Achieving project deliverables.

Planning a record-keeping system in advance helps reduce the workload associated with maintaining records.

When developing a record-keeping system, ensure that:

- o Standards are consistently applied
- o Organisational requirements are met
- o Filing systems are standardised and easily understood by all members
- o Records support reporting requirements

Different types of records that may be required include by various stakeholders include:

- o Correspondence
- o Financial data
- o Project outcomes (which can be captured in noting down feedback, attendance sheets, testimonials etc)
- o Meeting minutes and activity plans
- o Recording of time spent on project
- o Samples of brochures, and other communication material
- o Documentation of the model of your project

Keep electronic and hard copies of all documentation, as it is your legal responsibility to be accountable.

Benefits of accurate, efficient record keeping include providing:

- o Evidence of progress to stakeholders
- o Evidence of the need for additional resources
- o Information to specialist departments
- o Data to monitor expenses and purchases
- o Data to provide an overview of progress and to identify problems

What are we monitoring?

Project managers should monitor progress against:

- o Schedule
- o Budget
- o Resourcing plans
- o Quality standards and
- o Most importantly- community satisfaction

In community development- we create projects to address community needs, build community skills and capacity and provide opportunity for communities to showcase and celebrate their culture and customs.

One of the most important things that we need to monitor and evaluate in projects is community engagement, increase in capacity/ skills, satisfaction and overall impact on a given community. In addition to this a project manager may be required to monitor other factors noted below.

To monitor progress against the schedule, project managers need information about:

- o How actual start and finish dates compare to scheduled start and finish dates
- o The estimated completion date for tasks in progress
- o The progress made on unfinished activities
- o Any obstacles to finishing a task.

To monitor progress against budget, project managers need:

- o The estimated expenditure and the actual expenditure for each item
- o The amount spent to date against the total project costs and the budget breakdowns
- o The estimated remaining costs to complete the project
- o Information about any issues causing the project to cost more
- o To keep and file all financial documents such as receipts to support audit requirements.

Progress monitoring should also include an assessment of whether existing resources allocated are sufficient to complete each task.

This should include a review of:

- o Human resources
- o Physical resources
- o Technical resources.

To monitor the quality of work outputs, review:

- o   The original estimates of the standard of work required
- o   The standard of work being achieved and how it compares to required levels
- o   What is causing the standard of work to fall below requirements (if applicable)
- o   Related risk-management strategies and contingency plans as required.

Reporting requirements

The funding body, community and your organisation will specify their reporting requirements and it will be your role to provide progress reports. These may include:

- o   Regular, formal reporting of milestones and how much you have spent to senior management, steering committees, stakeholder groups, etc.
- o   Updates or briefings to project team on progress
- o   Bulletins issued to share good news or notify stakeholders of the successful completion of milestones
- o   Informal discussions with community members, organisation employees, stakeholders and others.

Review contracts to **understand clearly important dates for reporting and put these in your diary.**

Make sure you understand:

- o   Who needs the report
- o   How often they need the report
- o   What kind of information is required
- o   The preferred format of the report
- o   Who in your organisation needs to view and approve the report (as this may take time, which means they need notice and you need to be organised)

Risks management

Project managers should remain alert for risks throughout the routine monitoring, review and reporting processes. This may mean:

- Being prepared to implement contingency plans for risks identified in the planning stages
- Responding quickly and decisively to unforeseen risks
- Developing plans and systems to provide a framework for quick response.

Risk management includes:

- Seeking further resources to ensure deadlines are met
- Negotiating an extension of deadline or redefining completion requirements, quantity or quality of outcomes
- Reducing costs so budgets are not exceeded
- Researching and applying more efficient methods of completing project tasks
- Sharing ideas within the project team and with external groups to improve the way tasks are performed
- Outsourcing some aspects originally planned for completion by the team
- Changing roles and responsibilities within the team.

Take time to read the final three articles in your reader on monitoring, review and evaluation. These are:

1. **Principles of monitoring, review and evaluation;**
2. **Ten points for better monitoring and evaluation; and**
3. **The Evaluation Plan workbook**

FINALISING THE PROJECT

The nature of projects means that your role may or may not continue in the organisation following this project. This may be the same with other team members. It is important to make sure that once a project is finished and evaluated, that all loose ends are taken care of.

Finalising the project involves:

1- Completing accurate financial records

At the end of a project, financial records must be finalised to ensure that:

- o   Financial data has been maintained in line with project plans and according to required guidelines and standards
- o   The data is in a state that enables accurate comparisons of planned and actual expenditure
- o   The data is accurate and supported by evidence
- o   Documents can be easily transferred or copied to other departments for audit and checking purposes
- o   All financial records are prepared and presented in line with legislative requirements.

Some organisations require an external audit of financial records. The external auditor determines whether records and reports:

- o   Are accurate and valid
- o   Comply with legislative requirements
- o   Represent the project's operation and financial position.

2- Completing project documentation and obtaining approvals.

Many projects require a final report before the project can be signed off. Check the preferred format for this report from the funding body as they often have their own format for acquittals. If they do not have their own template, check the back of the reader for a template you can adapt.

Sign-off protocols and approval is required prior to submitting the final report and this may include getting permission from:

- o   Organisational management, including a steering committee
- o   Funding bodies, who may also require a financial acquittal statement
- o   Clients or customers who have joined in partnership with the organisation or provided any funding.

There are often loose ends to tidy up at the end of a project. These may include:

- o Finalising files and storing or archiving important information relating to the project
- o Destroying confidential information or information that is no longer required
- o Returning borrowed or leased equipment
- o Completing any correspondence and other documentation.

3- Assigning post-project roles to staff

Project managers should ensure that the employment of all staff that has participated in the project is concluded appropriately.

Project managers should understand that employees who have worked on the project might:

- o Be uncertain about their transfer back to normal responsibilities or about their next professional role
- o Be expecting a more challenging position in recognition of their project work.

Project managers may choose to conclude staff involvement by:

- o Reviewing each team member's performance
- o Assessing whether goals, KPIs and other objectives were met
- o Conducting project exit interviews
- o Providing references or letters of appreciation
- o Consulting with organisational specialists to ensure organisational and legislative requirements are met
- o Ensuring all staff have been fully paid and these details logged in financial records
- o Scheduling an end-of-project team function and celebration
- o Liaising with HR or other project managers to advise them of your team members' skills

It is appropriate to acknowledge the contribution of other support people in the team, the community, other stakeholders or other managers. A simple thank you and acknowledgement usually goes a long way and shows those you have worked with that they have been valued.

You may do this by:

- o A phone call or a card thanking them for their efforts
- o A follow-up letter, newspaper article or report summarising their contribution
- o Inviting them to a celebration event
- o A certificate acknowledging their efforts.

4- Getting feedback from community and determining if they require support once the project is finished:

Although your work with the community would have been for a temporary time, the relationships you have developed with the community may mean that they may:

- o Face uncertainty of your relationship post the project
- o Be unclear about the type of support they have access to post the project

Make sure that the community is acknowledged and has access to resources and reports developed in the project as this may assist them in being able to run their own projects in the future and / or obtaining funding.

Whilst the finalisation of a project should be an exciting time, it is also a change in how things have been and accordingly people may go through relevant emotional stages.

Make sure that you start discussing exit strategies with communities as early as possible, which may involve them being more active as the project progresses; linking them to other programs and supports in your agency or to other resources and agencies as required.

Remember- take time to reflect on the lessons you have learnt throughout the project and especially before things wrap up.

Take these lessons to the next project/ role you undertake.