Essentials of Project Management

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What is a project?

- The cynic would say …
a series of loosely connected activities that take three times longer and cost twice as much as foreseen, to achieve half the expected results

- But should really be …
a systematic, goal-oriented, temporary and one-time endeavour to create a unique product or service within clearly specified time, cost and quality constraints
What is a project? (cont)

A particular method of organising work that differs from standard business operational activities:

– Different from *routine* activities:
  
  does not involve the application of implicit or explicit procedures existing in the organisation to regulate day-to-day work

– Different from *improvisation*:
  
  • more effective, but also more time-consuming
  • entails a level of uncertainty or risk

– Particularly useful to introduce innovations, address new challenges or find solutions for problems for which the existing procedures and routines do not accommodate
Types of projects in public health

Research projects:
- Identify health problems
- Identify risk factors & determinants
- Identify strategies to address problem determinants

Development projects:
- Develop and pilot test interventions

Implementation projects:
- Implement interventions in natural setting
- Test applicability enhance stakeholder participation

Execution projects:
- Implement intervention on large scale

Research Programme:
- Universities
- PH Institutes
- International Organisations

Public Health Programme:
- Universities
- NGO’s
- Government
- Local partners

NGO’s

Institutionalise
What is project management?

• *A cynic would say …*
  not so much knowing what to do and when, as knowing what excuses to give and when

• *But it really is …*
  The skills, knowledge, experience, tools and processes that are required to make a project successful
Project management comprises

• A set of **skills, specialist knowledge, and experience** to reduce the level of risk and enhance the likelihood of success

• A set of **tools** to improve chances of success
  
  e.g., document templates, registers, planning software, modelling software, audit checklists, review forms, …

• A series of **processes** to monitor and control time, cost, quality and scope on projects
  
  e.g., time management, cost management, quality management, change management, risk management and issue management
Pitfalls in project management

- Selecting an unimportant problem
- Addressing the wrong problem determinants
- Not choosing the best intervention strategy
  - “quick fix” or “common sense” solutions
  - reinventing the wheel
  - insufficient adaptation to the target group or context
- Poor quality of implementation
- Not performing the right kind of evaluation
  - wrong evaluation level
  - poor evaluation methodology
- Insufficient dissemination
  - poor visibility of the project
  - no sustainability of the results
Avoiding pitfalls by following a systematic approach

“Failing to plan... is planning to fail”
Planning for quality

• **Project planning**
  – a form of operational planning
    • mapping out the consecutive steps to implement the project activities
    • based on an analysis of relevant information
    • linked to the program in which the project takes place and to which it contributes
  – involvement of internal and external stakeholders from the start
  – logical structure is essential
Elements of a project plan

- Clear rationale with relevance to the problem, programme and policy context
- Aims and Objectives
- Approach and method
- Outcomes, outputs and deliverables
- Planning and organisation of the work
- Organisation of the partnership
- Resource planning
- Evaluation plan
- Dissemination plan
Aims, Objectives and Target Group

• Indicates what you want to achieve and with whom

• Should include:
  – **Aim**: a broad statement of the problem you intend to solve or what you intend to achieve
  – **Objectives**: realistic targets to achieve during the project, derived from the aim and should be
    • *Specific* – Clear about what will be achieved
    • *Measurable* – It is possible to quantify results and measure when they have been achieved
    • *Achievable* – They can be achieved
    • *Realistic* – Attainable with within project resources
    • *Timed* – Attainable within a specified period
  – **Target group**: groups who will be involved in and benefit from the project
    • *Direct* (immediate) beneficiaries
    • *Indirect* beneficiaries
Outcomes and deliverables

• Specification of what the project will create
• Should include:
  – **Deliverables** – tangible outputs like content, software, guidelines, etc
  – **Outputs** – less tangible outputs that should be documented and shared with the wider community
    e.g., knowledge and experience, attitudes, competences, ...
  – **Outcomes** – the changes your project will stimulate or enable, and their likely impact on the policy, health and research communities
    e.g., lifestyle changes, health status changes, more health equality
  – **Core project documents** – the plans and reports that support project work
Methods

• Sets out the overall approach that will be followed to achieve the set objectives
• Should include:
  – **Scope and boundaries** – Clear indication of what will and will not be covered,
  – **Strategy and/or methodology** – Description of how the objectives will be achieved
  – **Critical success factors** – Factors on which the success or value of the project depends
Organisation of the work

• A clear, comprehensive, and logically structured outline of who will be doing what at what time with whom to achieve the project objectives and deliverables

• Should include:
  – A detailed description of the different tasks
  – A timetable with milestones
    • scheduled events signifying important decision making moments or the completion of deliverables
    • allows a proper monitoring of the project
Organisation in work packages

• Building blocks of the *work breakdown structure* that allows the project management to define the steps necessary for completion of the work can be thought of as “sub-projects”, which, in combination, form the completed project.

• Distinction between
  – *content* work packages
    focus on the tasks that will lead to the project outcomes
  – *horizontal* work packages
    concerned with the management of the project e.g., collection and distribution if information among the partners, monitoring and reporting of progress, communication and decision making within the partnership, …
# Work breakdown table

<table>
<thead>
<tr>
<th>No</th>
<th>Type of task</th>
<th>Description of task</th>
<th>Outputs deliverables</th>
<th>Work Package</th>
<th>Responsible person(s)</th>
<th>Deadline</th>
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Project coordination

• **Coordination**
  the planning, monitoring and control of all aspects of a project and the motivation of those involved, to achieve the objectives

• **Key elements**
  – Project plan and supporting plans
    budget plan, human resource plan, communications plan, risk management plan, evaluation plan, dissemination plan
  – Management structure
  – Project meetings
  – Core project documents
    • Minutes of meetings
    • Interim and final reports
    • Terms of reference for the management committee
    • Agreements with partners and other stakeholders (e.g., consortium or license agreements)
Resource planning

• An estimation of the expected input in terms of the resources necessary to achieve the project objectives
  Key project resources: people, time, equipment, budget

• Resource planning:
  – **Human resource planning** – estimation of the staff input
    • define requirements by listing the roles and responsibilities for the project, without being constrained by the people that are available
    • anticipate number of working days
    • look for people within and outside
    • consider personalities in addition to skills
  – **Financial planning**
    • estimation of the financial expenditure for different posts (staff, travel and subsistence, equipment, subcontracting, overheads).
    • estimation of sources of income
    • planning of expenditure over time
Time planning using a Gantt Chart

<table>
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<th>Duration</th>
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Evaluation plan

• Outline how the quality of project implementation, outputs and outcomes will be evaluated

• Key elements:
  – Evaluation questions
    • for process evaluation: linked to the planning and organisation of the project activities
    • for effect evaluation: linked to the specific objectives
    • in consultation with the stakeholders
  – Evaluation indicators
    • Process indicators (progress)
    • Performance indicators (outputs)
    • Effect indicators (achievement of objectives)
  – Evaluation targets
    numbers expected, level of quality aimed for, ... to serve as a standard to compare the process or results of the project with
  – Evaluation methods linked to the indicators
Evaluation Indicators

- **Variables** which measure the performance and progress of the work and the level to which the objectives are reached.
- Differentiate between:
  - **Process indicators** (progress)
  - **Performance indicators** (outputs)
  - **Effect indicators** (achievement of objectives)
- Indicators should be:
  - Explicitly linked to the specific objectives
    - For each specific objective, one or more indicators can be defined.
  - Either **quantitative** (e.g., numbers of participants, numbers of users, ...) or **qualitative** (e.g., the appreciation of project deliverables by external experts).
  - **Measurable**: the way in which they will be measured must be detailed in an evaluation plan (e.g., document analysis, counting, questionnaire, observation, ...).
## Indicator table

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Actions</th>
<th>Process Indicators</th>
<th>Impact/ outcome indicators</th>
<th>Method of data collection</th>
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Practical issues on evaluation

• Outsourcing evaluation?
  – **Pro's:** enhance the quality and objectivity of the evaluation, add to the project status, take away the practical burden of carrying out the evaluation
  – **Cons:** reduces the ownership of the evaluation results, may give rise to conflicts over priorities, and reduces the opportunity to learn from the project
  – Small-scale evaluations focusing on formative aspects can mostly be undertaken by organizations themselves

• Budget
  Evaluation should be incorporated in the project’s budget in a way that makes the evaluation study realistic, manageable, efficient, and productive

• Timing
  – It is a common mistake to assume that evaluation takes place at the end of a project.
  – Evaluation must be planned from the outset and conducted throughout the project lifetime
Dissemination

• The process of making the results and deliverables of a project available to the stakeholders and to the wider audience

• Key elements
  – **Stakeholder analysis** – an exercise in which stakeholders are identified, listed, and assessed in term of their interest in the project and importance for the its success, dissemination and sustainability
  – **Dissemination strategy** – explains how the visibility of the project outputs and outcomes will be maximized and shared with stakeholders, relevant institutions, organisations, and individuals
  – **Exit/sustainability strategy** – models and scenarios outlining what should happen to the project outputs at the end of the project, and to explore how they can be sustained
Conclusions

- A project represents a method of organising work which is particularly useful to introduce innovations, address new challenges or find solutions for problems.
- Project success depends on the quality of its planning.
- A good quality project plan provides a basis for adequate follow-up and evaluation and increases the visibility and sustainability of outcomes.
- Evaluation and dissemination should be planned from the onset.
“My personal philosophy is not to undertake a project unless it is manifestly important and nearly impossible”

- Edwin H. Land (polaroid camera inventor)

Further info
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