



FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

Webinar 4: How to apply best practices in project management

Horticulture for Development Professional Series

Questions? Email horticulture@ucdavis.edu



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Mission Critical Designs

Why shouldn't learning be fun?

Project Management for
the
NGO Professional

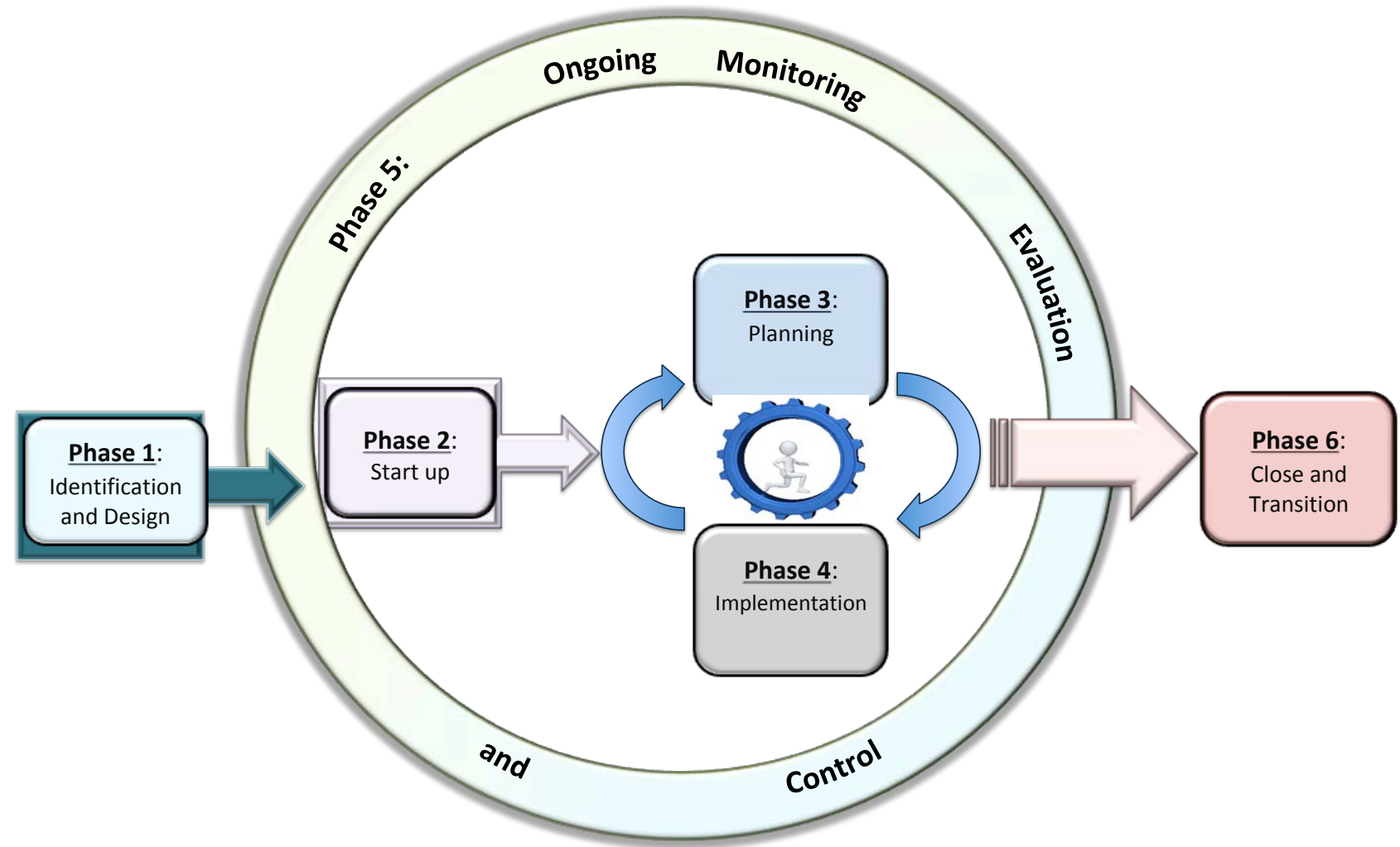


Mission Critical Designs

*The fundamentals you need
to understand and manage
projects*

Maureen MacCarthy, MBA

How to Apply Best Practices in Project Management





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Why shouldn't learning be fun?



Maureen MacCarthy, MBA

About your trainer: Maureen MacCarthy, MBA

Since 2000, I have been providing organizational capacity building, consulting and training services to Nonprofits, NGO's, Government agencies and related businesses.

I believe strongly that project management is a fundamental core competency of our sector and an essential skill set to meet the emerging developmental needs and adherence to greater standards of efficiency and impact. In 2011, I developed and launched the three day training and certification course for InsideNGO's PMD Pro 1 Certification in Project Management. I have trained and certified over 5000 NGO global professionals in Project Management in 14 countries.

I believe that people, teams, organizations, and companies want the capacity and the opportunity to contribute their best efforts, to do great work, and to be seen and appreciated for their efforts.

I am delighted to share this time and this webinar with you. I hope I can assist you today in your professional development and hope to remain a future resource that you will turn to in need.



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maureen@mcd-ngo.com

Maureen MacCarthy, MBA

About your trainer: Maureen MacCarthy, MBA Services and Resources

Consulting, training and facilitation for improving organizational performance and results through:

- Organizational Effectiveness and Change Initiatives – Change management
- Management for Managers
- Project Management
- Training – Courses and Workshop Development
- Myers Briggs Personality Type Assessment
- Facilitation – large and small groups
- Global Learning and Managing Knowledge

[Download our free PM toolkit: www.missioncriticaldevelopment.com](http://www.missioncriticaldevelopment.com)



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The fundamentals you need to understand and manage projects

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What is Project Management?



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Definition:

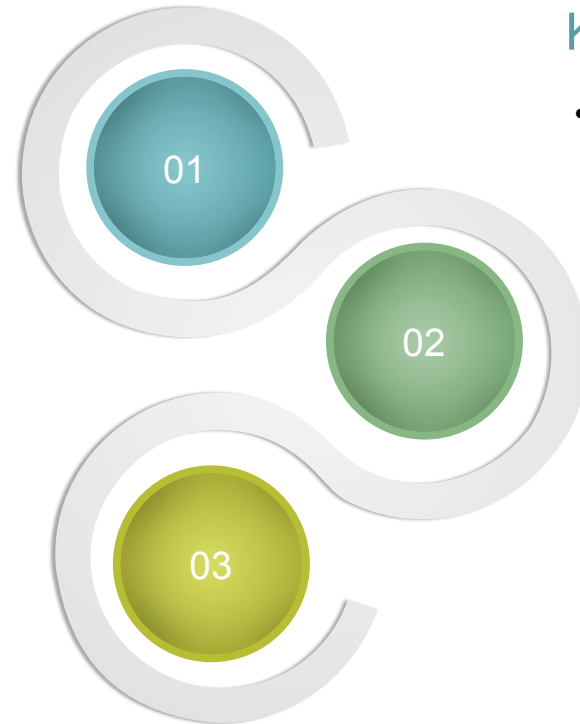
Project Management

Project Management is the application of knowledge, skills, tools and techniques to project activities to meet the project requirements.



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Project Management is the...



Knowledge

- Professional approach, terminology and understanding to the development, organization, execution and management of all projects

Tools

- Professional standard tool set(s) for designing, managing and executing projects

Skills

- Applying the knowledge and tools in the context of your project successfully

the application of *knowledge, tools* and *skills* to execute project activities to meet the project requirements.



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The fundamentals you need to understand and manage projects

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Project Management was invented by Project Managers



It's "best practices" from experience, to help you succeed.



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Definition:
Project

*"A project can be defines as
a temporary endeavor
undertaken to create a
unique product or service"*

- PMI



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Project Management

To understand project Management, we first have to be able to define a project



What makes a project, "a project"?



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Concept: Project Constraint Triangle

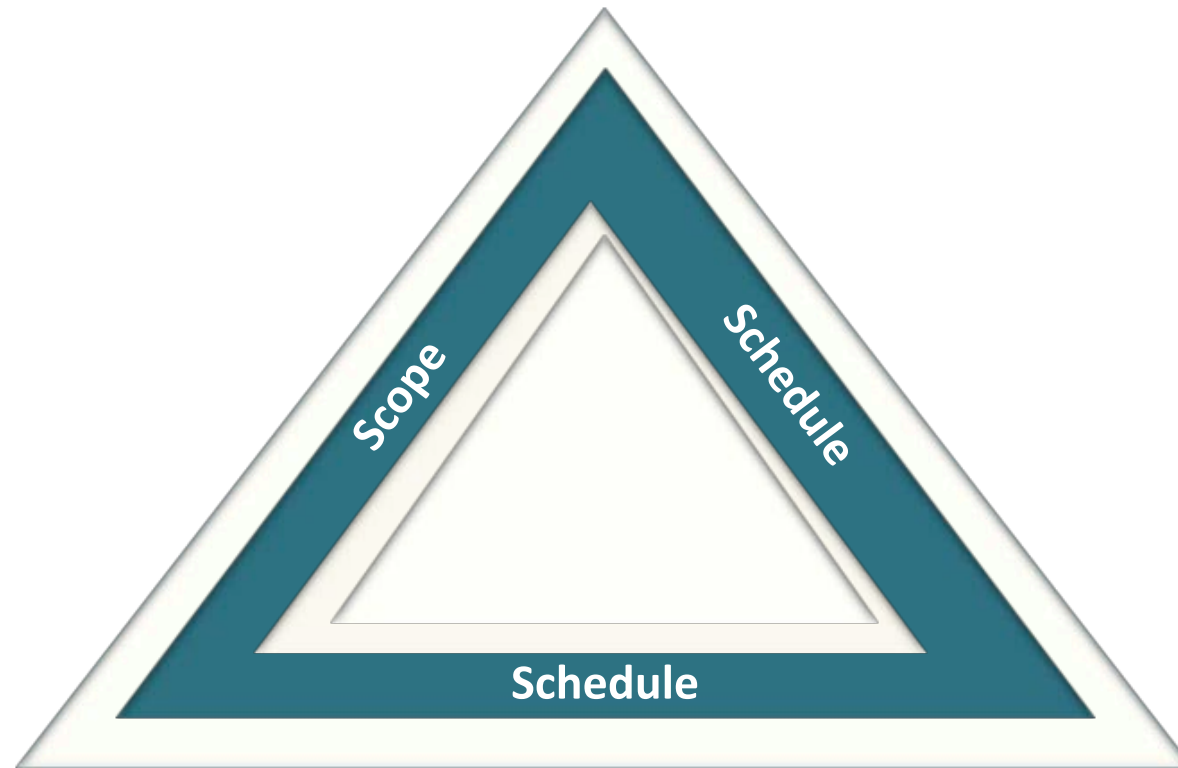
Project Constraint Triangle, visually represent the limits that define and bound all project activities and services must be carried out in order to achieve project outputs and outcomes.



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Project Constraint Triangle

The PM's way to show the relationship of the constraints that bind all projects



These elements are connected. If one is impacted, the others are likely to be.



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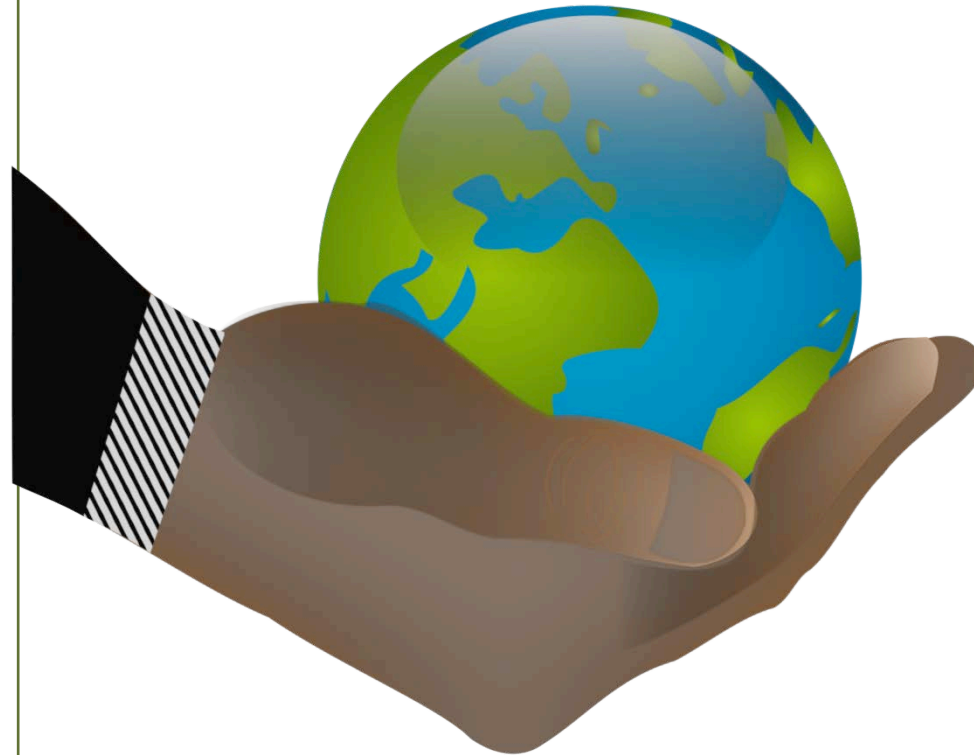
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Project Management in the Development Sector

Understanding the context of Project Management in a donor-driven sector



- Social Welfare and Benefits
- Outputs and Outcomes
- Process and Learning
- Donor funding

How are projects different in NGO/ NPO sector?



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The Project Manager's Challenge

Delivering on scope, on schedule and on budget



***Great accountability
with limited authority.***

It's a complex job that
requires multiple skill
sets."

What does it take to be a successful Project Manager?



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The fundamentals you need to understand and manage projects

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Core Competencies of a Project Manager

Personal / Self-Management

- Analyzing
- Presenting
- Prioritizing
- Persuading
- Listening

Development Sector Knowledge

- NGO Context
- Local / Cultural Context
- Subject Matter Content



Interpersonal / Leadership

- Leadership
- Conflict Resolution
- Motivating Groups
- Team Building
- Consensus Building
- Negotiation Skills
- Moving agendas

PM Technical Competency

- Project Identification & Design
- Project Initiation
- Project Planning
- Project Implementation



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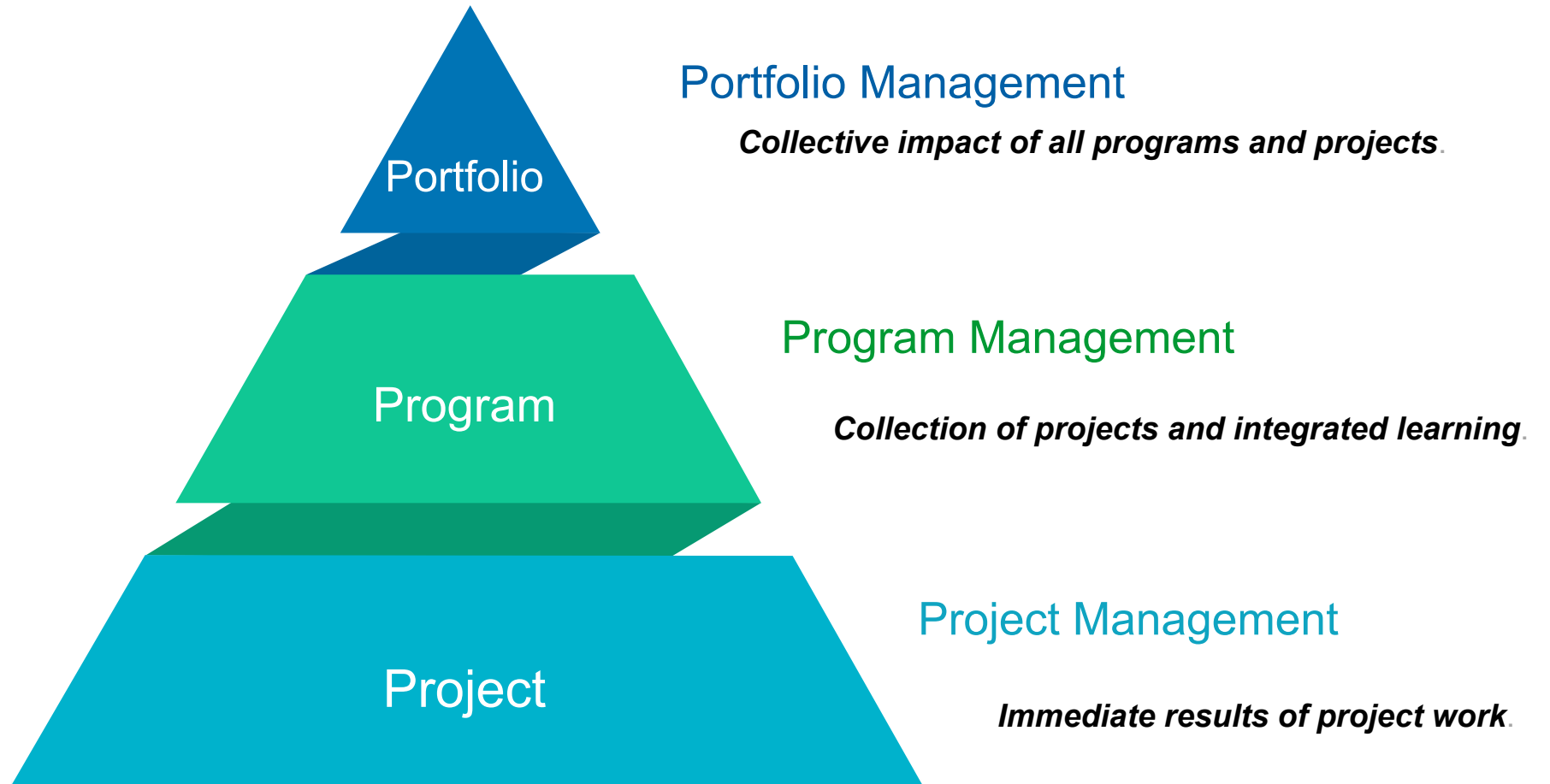
Definition:
Organizational Project
Management

**Integrated portfolio,
program and project
management**



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Projects, Programs and Portfolios



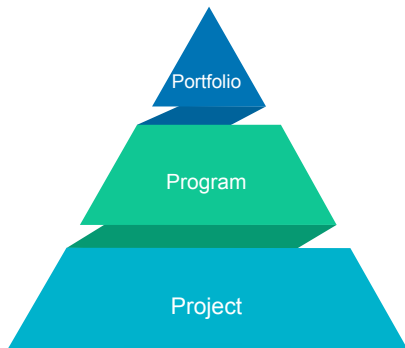


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Organizational PM: Project Management

**Integrated portfolio,
program and project
management**

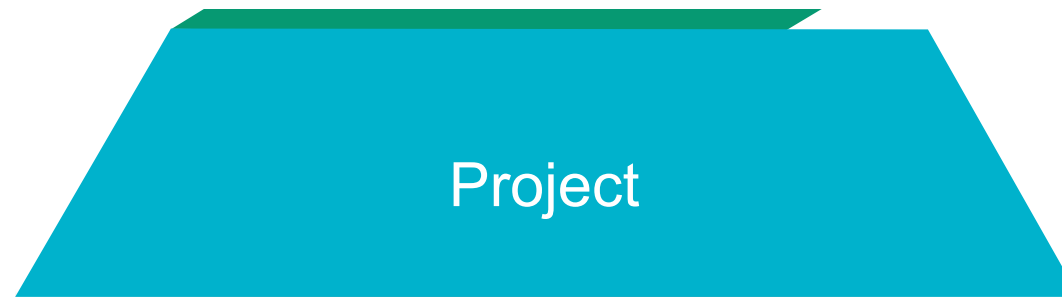


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Project Management

Immediate results of project work

- The tangible results of the work
- Ensures delivery on commitments and contracts
- Positive changes in the lives of the beneficiaries



Project Management

Immediate results of project work.



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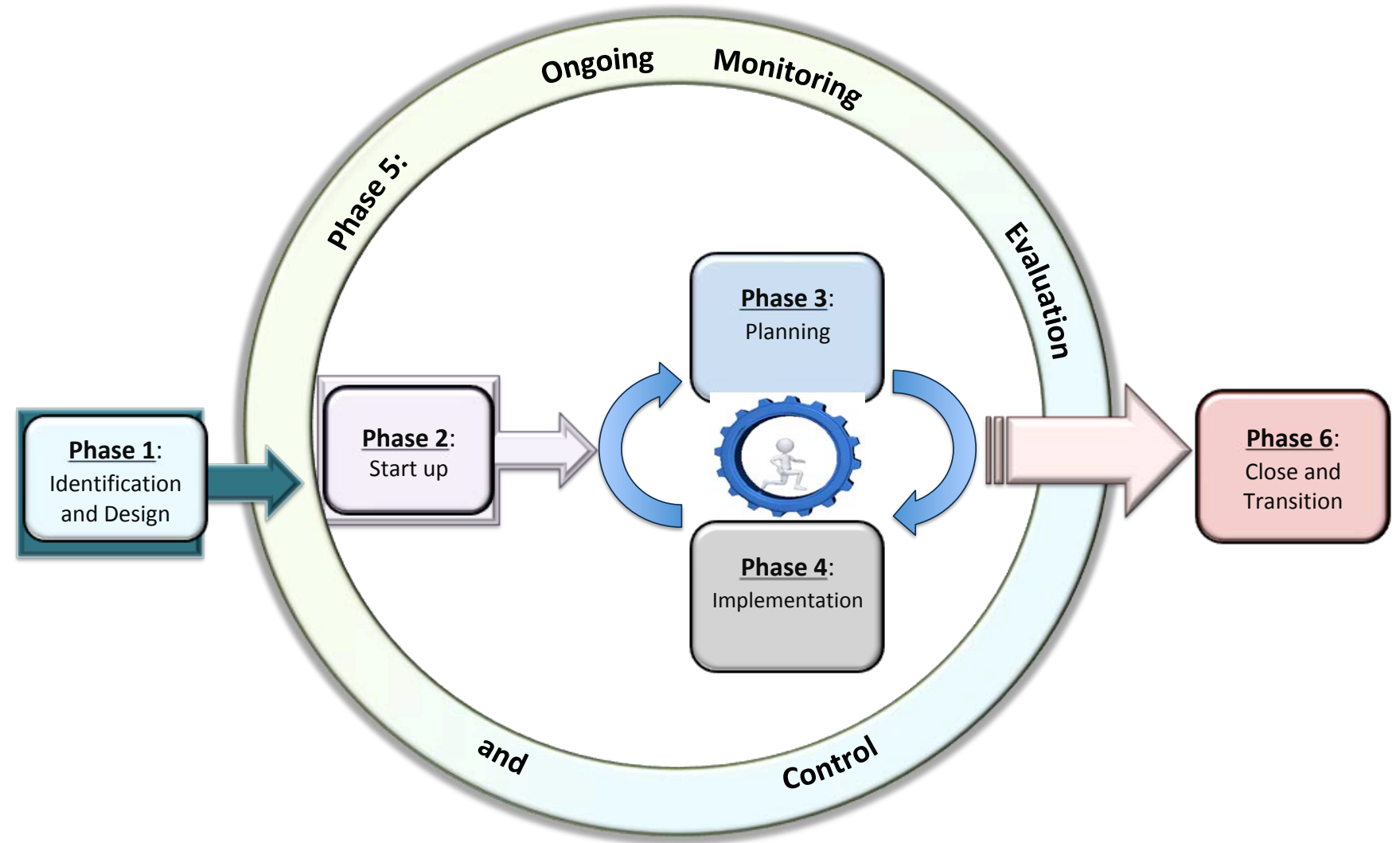


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Project Lifecycle: A Six Phased approach to organizing and managing projects





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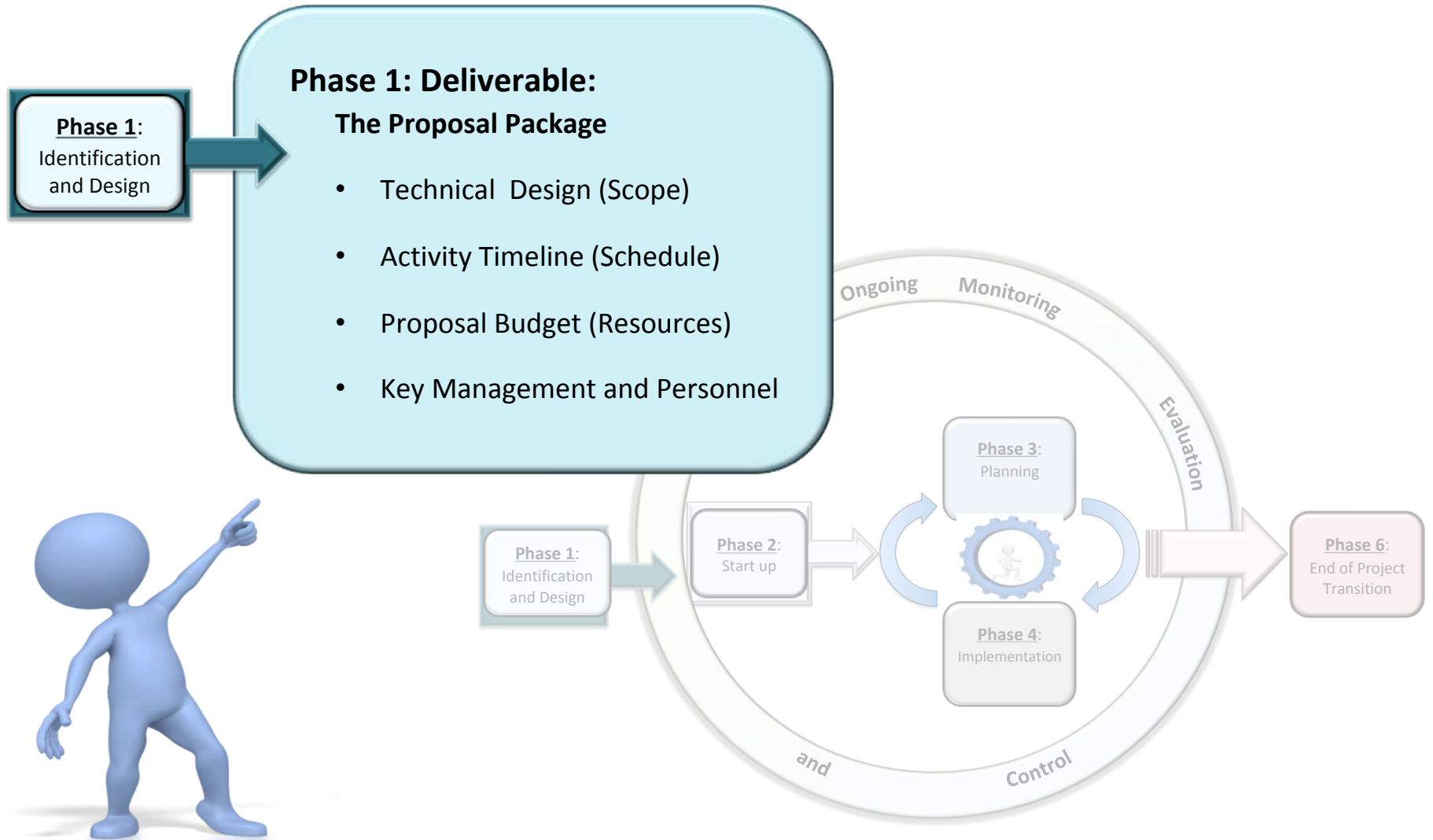
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Phase 1:
Identification and
Design

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Phase 1 - Identification and Design





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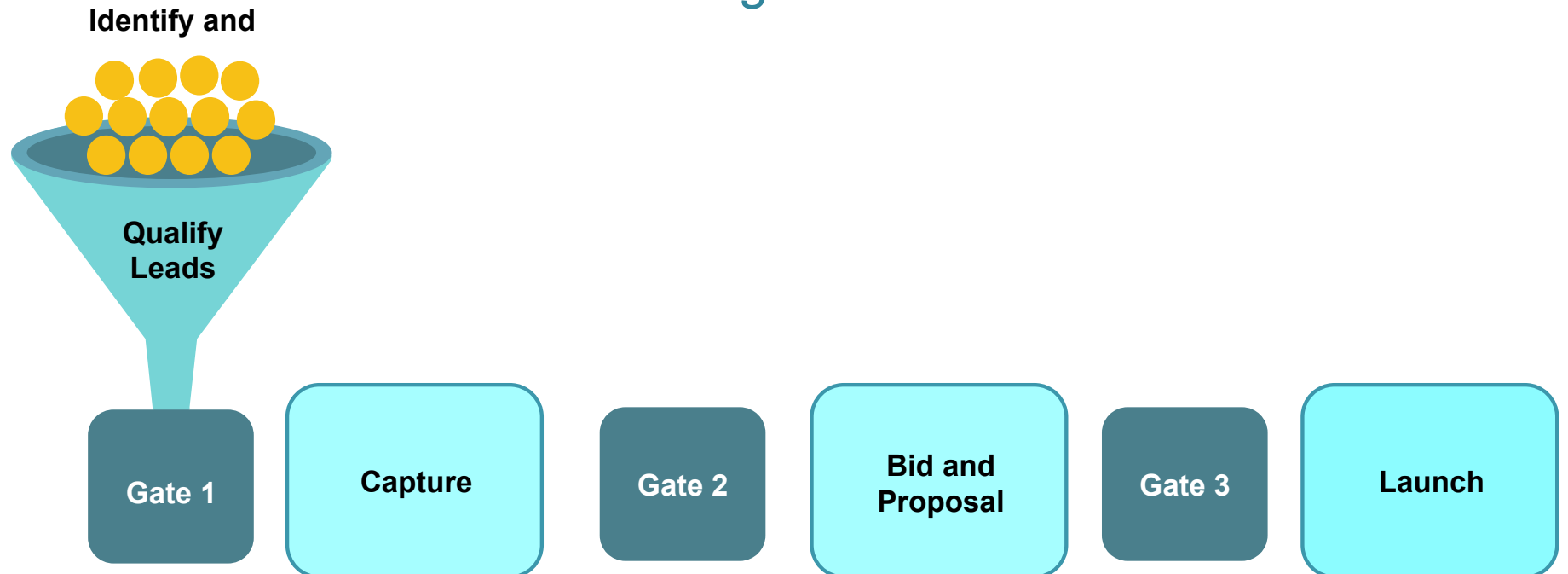
Phase 1:
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Design

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Phase 1 - Identification and Design: *in action...*

The Project Proposal Process

*Setting out to win new awards,
grants and contacts*





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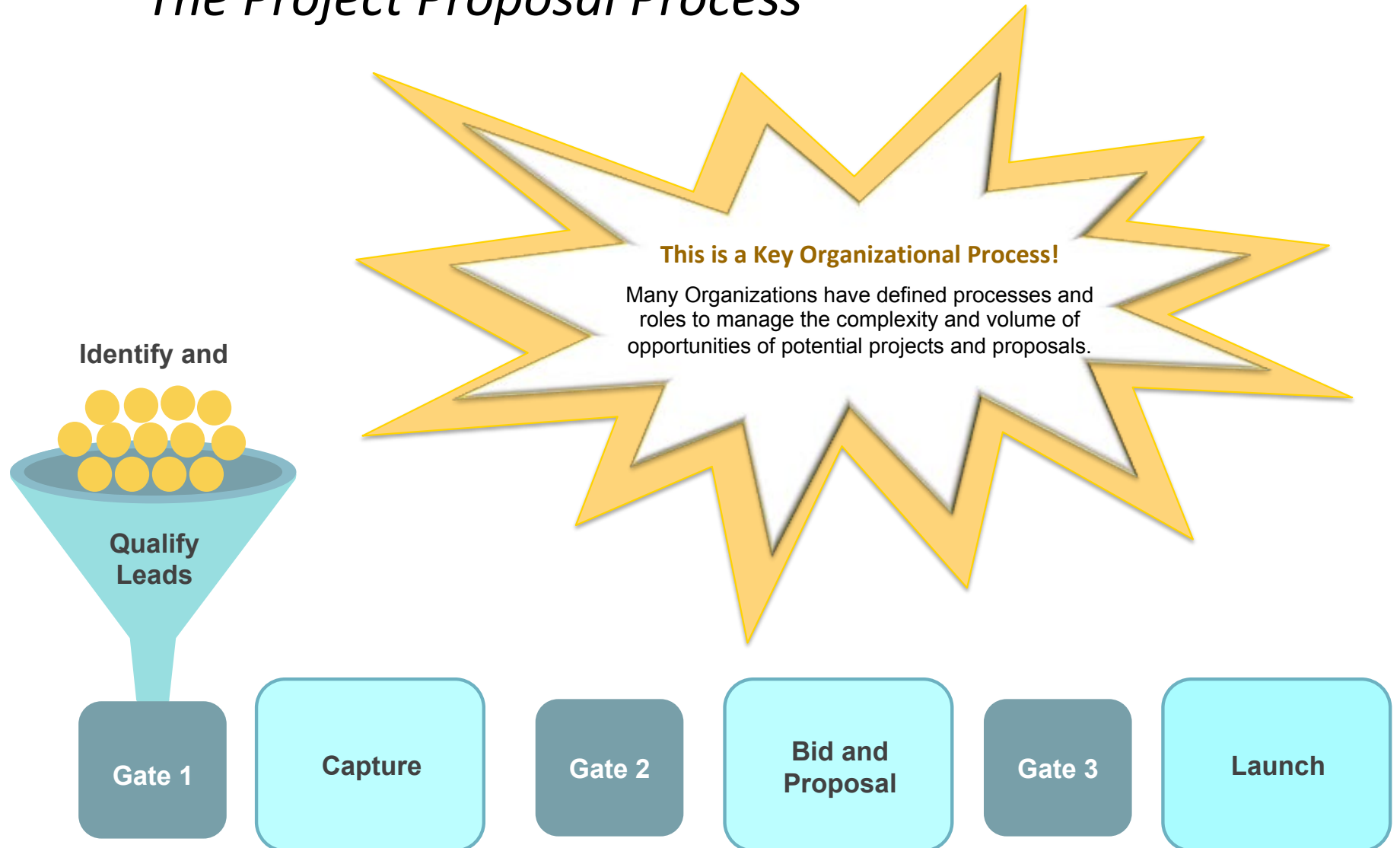
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Design

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Phase 1 - Identification and Design: *in action...* *The Project Proposal Process*





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Phase 1 - Identification and Design: *in action...*

The Project Proposal Process





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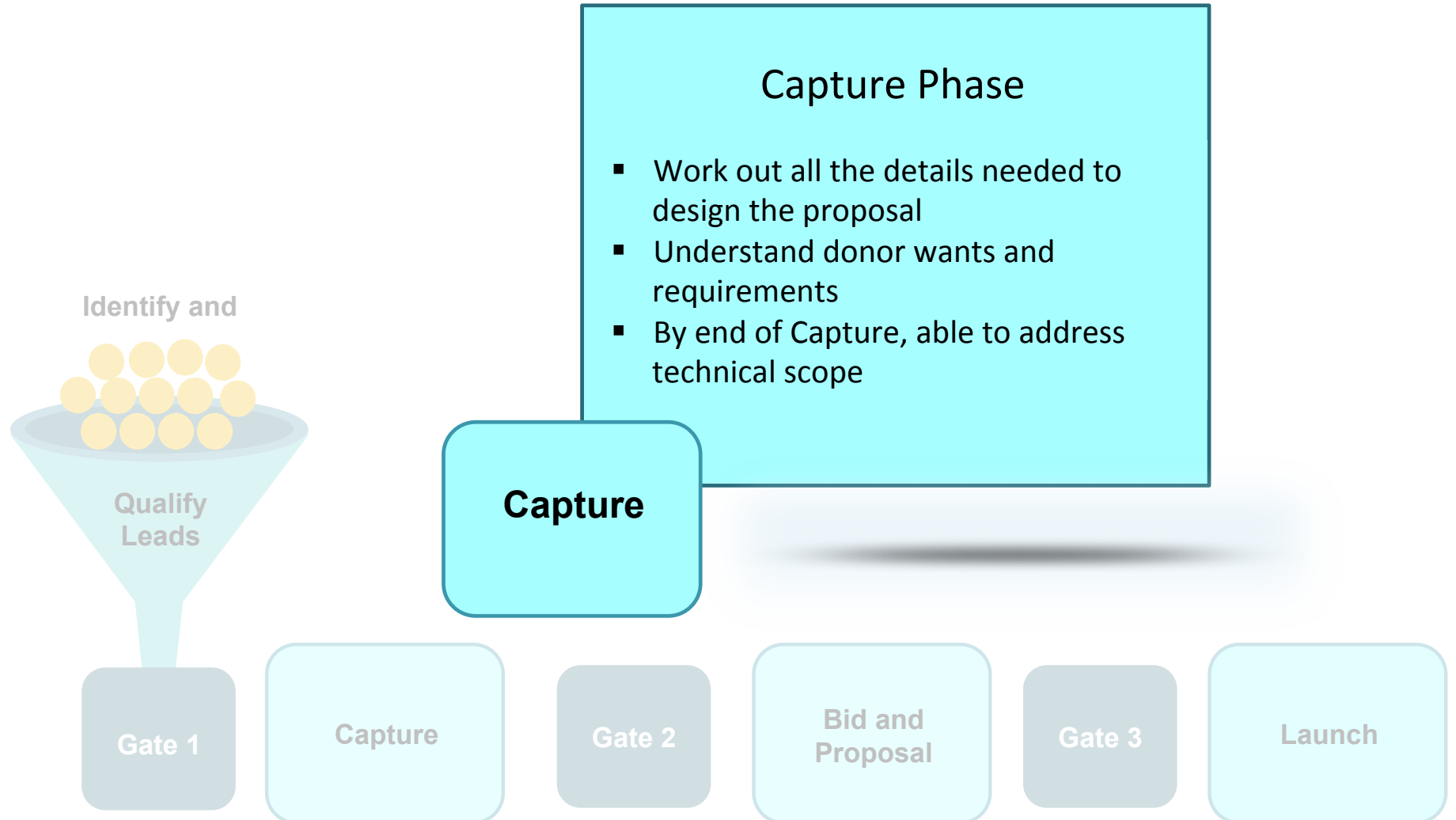
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Phase 1 - Identification and Design: *in action...*

The Project Proposal Process





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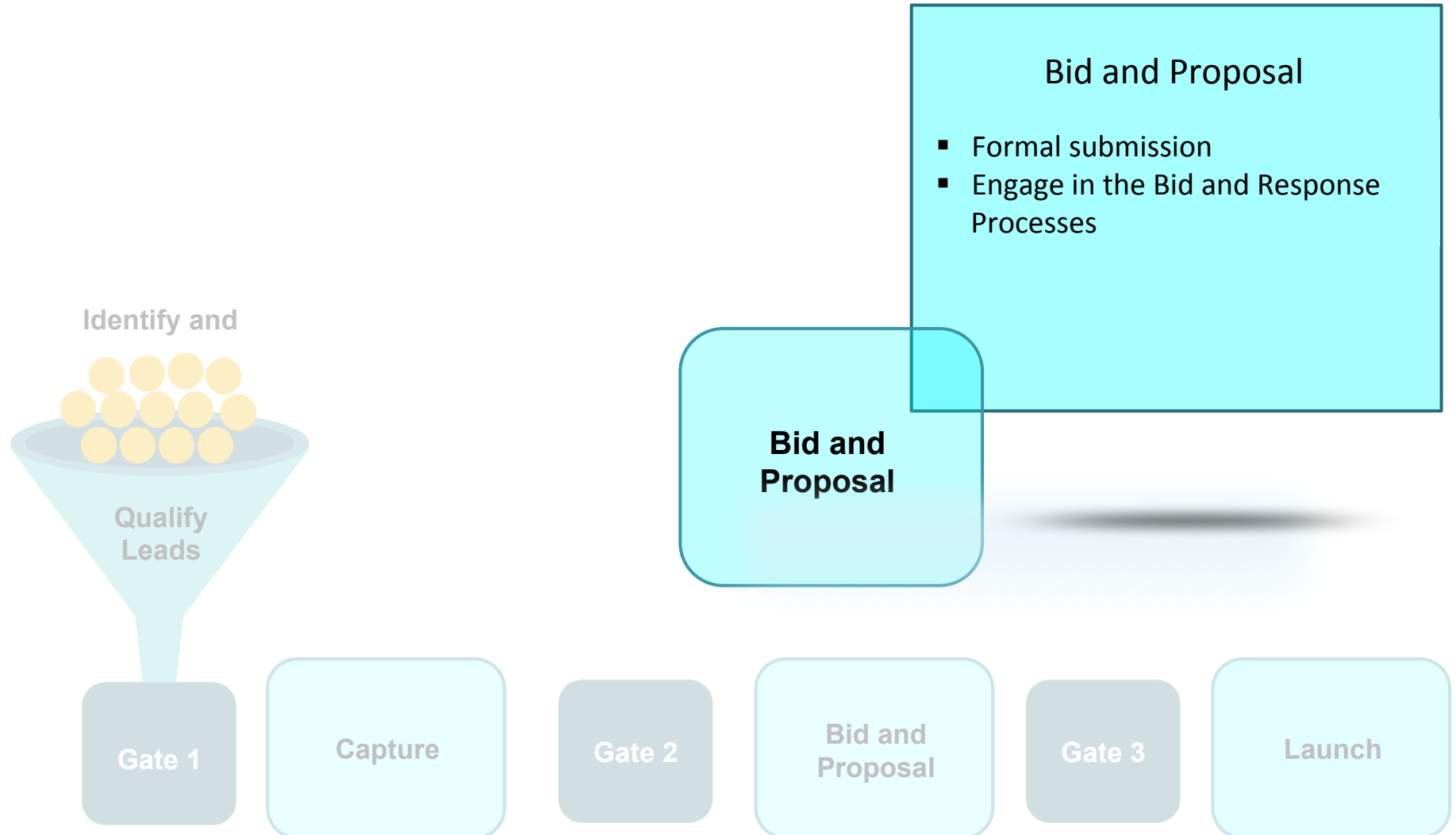
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Phase 1 - Identification and Design: *in action...*

The Project Proposal Process

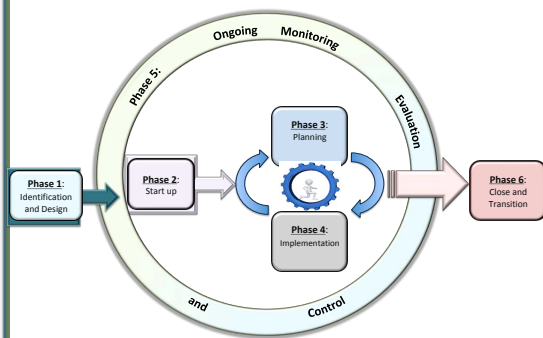




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Phase 1: Identification and Design



Project Lifecycle

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Phase 1 - Identification and Design: *in action...* *The Funders*

10 Largest Country Aid Donors

- United States
- United Kingdom
- Germany
- European Union
- Japan
- France
- Sweden
- Netherlands
- Canada
- Norway

10 Largest Foundations in the World

- The Bill and Melinda Gates Foundation
- Wellcome Trust
- Howard Hughes Medical Institute
- Lilly Endowment
- Ford Foundation
- Robert Wood Johnson Foundation
- W.K. Kellogg Foundation
- William and Flora Hewlett Foundation
- Robert Bosch Foundation
- David and Lucille Packard Foundation

* Each sets its own proposal and project performance requirements



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Project Management for the NGO Professional

Phase 1:
Identification and Design

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Phase 1 - Identification and Design: *in action...* The Funders

Opportunities and Proposal Process Guidance

HOME » WORK WITH USAID » BUSINESS FORECAST

BUSINESS FORECAST

About the Forecast

The Business Forecast is an informational resource on potential funding and partnership opportunities. It provides information on various types of activities:

- Blanket Purchase Agreement
- Broad Agency Announcement
- Contract
- Cooperative Agreement
- Development Innovation
- Fixed Amount Award
- General Services Administration
- Indefinite Delivery/Indefinite Quantity
- Leader with Associates
- Personal Services Contract
- Purchase Order
- Task Orders issued under a contract
- Activities that are To Be Determined

Organizations interested in submitting a proposal or application should refer to the procurement process to provide maximum opportunity.



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PROPOSAL GUIDELINES

FEBRUARY 2018 v.1

USAID

<https://www.usaid.gov/business-forecast>

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— How We Work —

GRANT OPPORTUNITIES

The foundation awards the majority of its grants to U.S. 501(c)(3) organizations and other tax-exempt organizations identified by our staff. ([Tax status definitions](#)) ([Glossary of terms](#))

Request for Proposals (RFP):

- [Grand Challenges Grant Opportunities](#)
- [RFP for African Regional Intelligence Platform](#)
- [RFP for Postsecondary Success Intermediaries for Scale](#)

GENERAL INFORMATION

- [How We Make Grants](#)
- [Glossary of Terms](#)
- [Information Sharing Approach](#)
- [Global Access Statement](#)
- [Open Access Policy](#)
- [Evaluation Policy](#)
- [Grantees FAQ](#)
- Grant Opportunities**
- [Grant Seeking Resources](#)
- [What We Do Not Fund](#)
- [Reporting Scams](#)
- [Tax Status Definitions](#)

NEXT: GRANT SEEKING RESOURCES

GRANT SEEKING RESOURCES

If you are an organization looking for funding, please refer to the following information:

- Review our foundation grantmaking priorities to see if your organization falls within the basic funding strategies and eligibility criteria.
- Next, check the current [funding opportunities](#) and take next steps as appropriate.

Online Resources for Organizations

- The Foundation Center**
This organization provides access to private foundation information, directories, books and periodicals, grantmaker files, and bibliographic databases.
- TechSoup.org**
Nonprofits seeking technical support or hardware may find assistance through CompuMentor's TechSoup.org, which provides free information, resources, and

BMGF

<https://www.gatesfoundation.org/How-We-Work>



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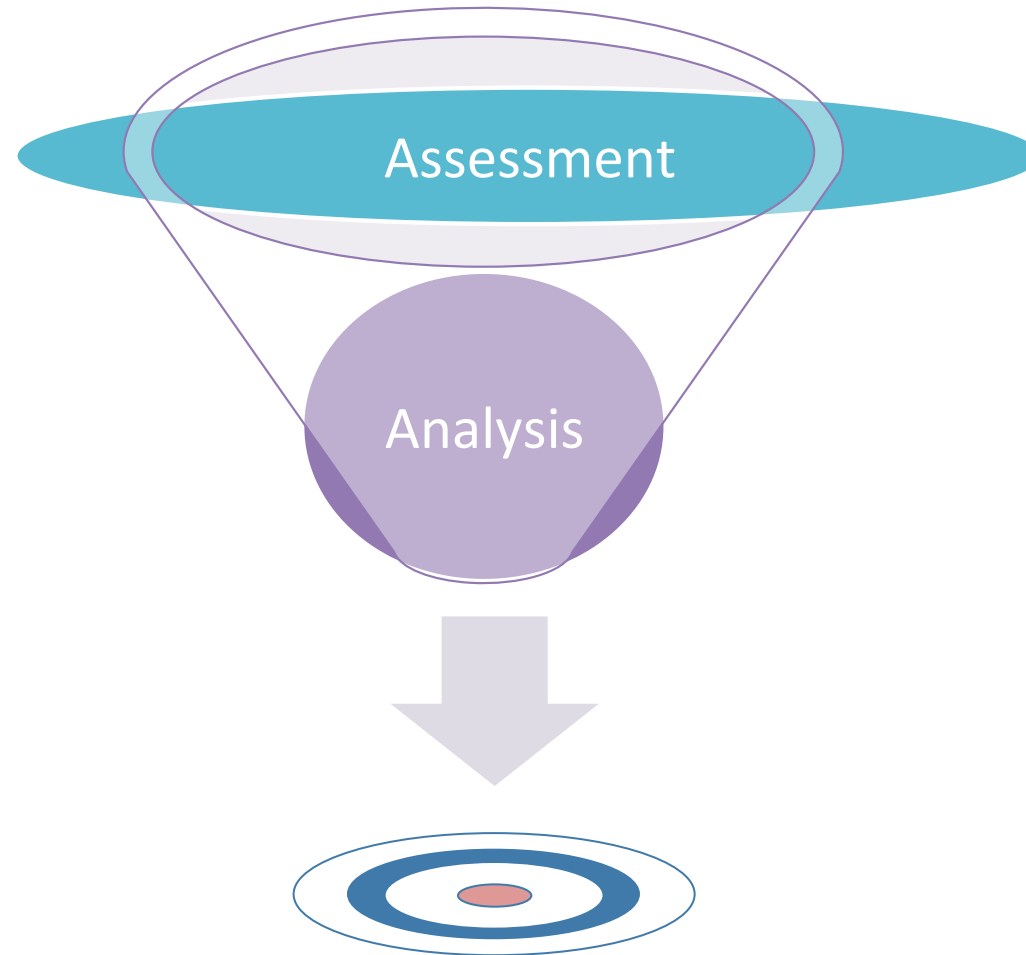
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Identification and
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Phase 1: Identification and Design

Process and Tools to help create the technical design





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Phase 1:
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Phase 1: Identification and Design

Deciding Scope: Criteria to consider

Needs Prioritization



- Align with needs and strategy

External Considerations



- Politics and relationships
- Other Projects, partners and competitors

Internal Considerations



- Capacity
- Expertise
- Resource Availabilitiy

Feasibility



- Can the proposed work be realistically accomplished?
- Is the rate of return for the investment acceptable?



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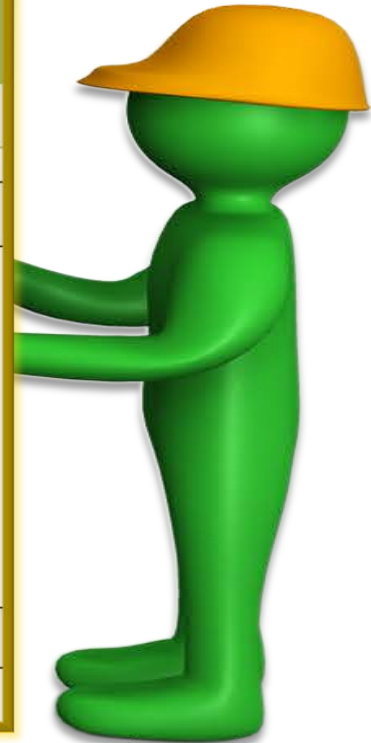
Phase 1: Identification and Design

The Project Log Frame

Goal: *What is the impact we want to achieve? What does our community look like if we are successful?*

Healthy Mothers and Infants in our target population

| Objective | Key Outputs | Major Activities | Indicators | Assumptions |
|--|--|--|---|--|
| <i>What are the desired effects on people's knowledge, attitudes and behaviors</i> | <i>What final goods and services will we provide</i> | <i>What daily efforts contribute to our outputs?</i> | <i>How will we know if we achieved our Objective?</i> | <i>The situations, events, conditions which are necessary for success but largely beyond the control of the Project's management</i> |
| | | | | |
| | | | | |

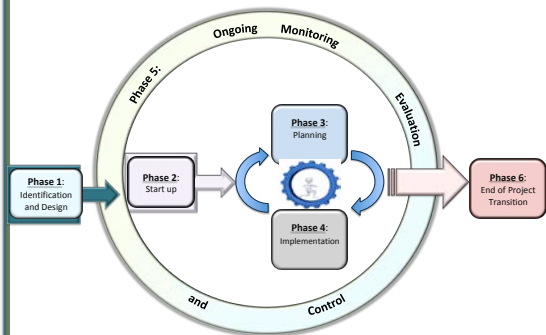




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Phase 1: Identification and Design



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Phase 1 - Identification and Design

Take a moment if you would like, to write down any questions that you would like to ask in our “Q&A” Session following the presentation.





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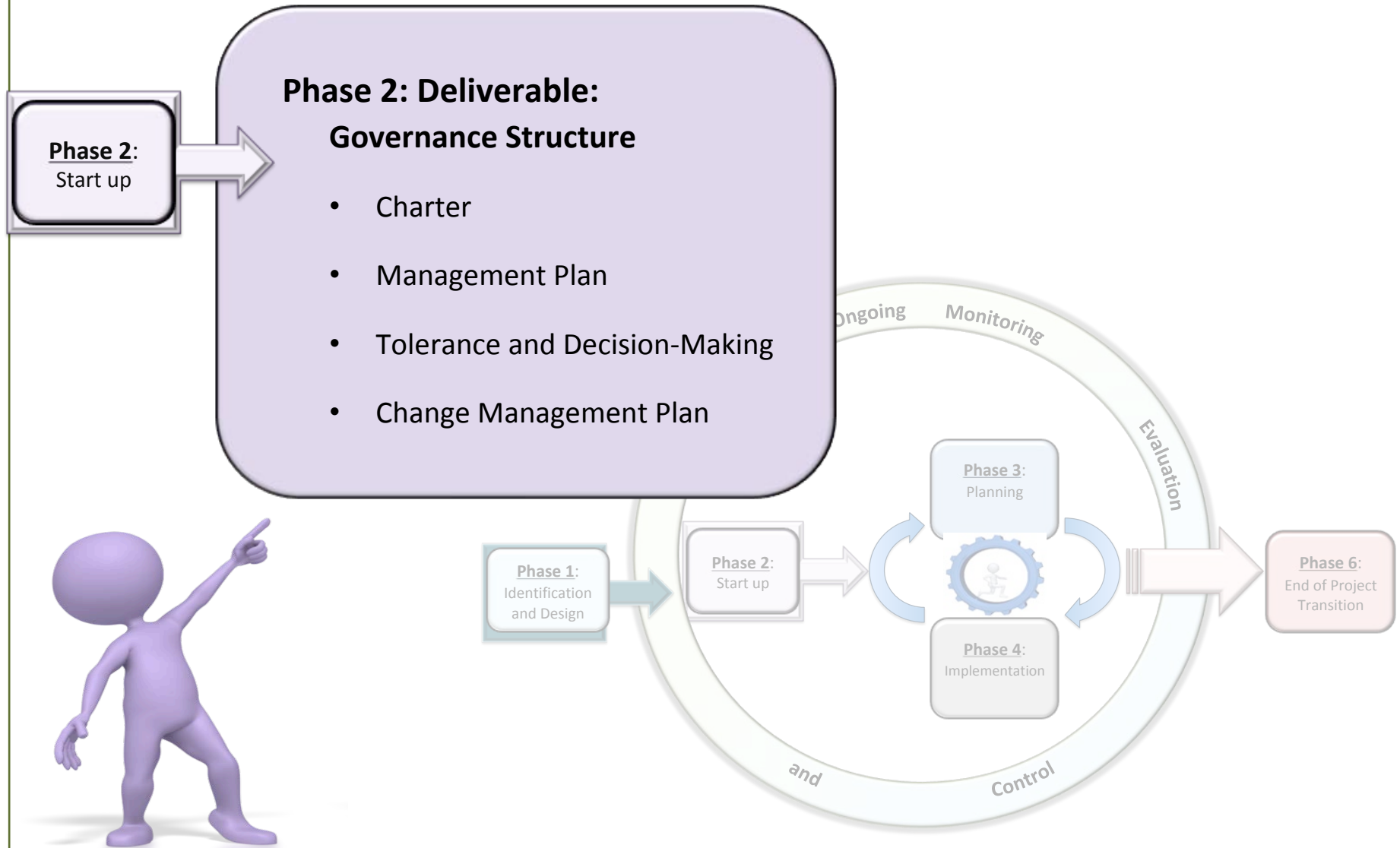
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Phase 2:
Start up

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Phase 2: Start up





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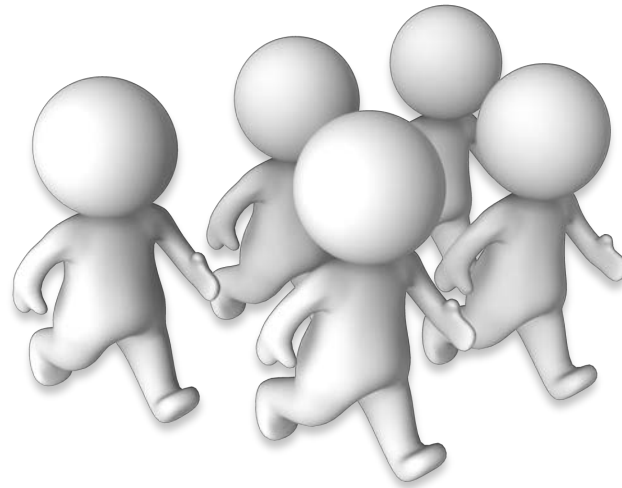
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Phase 2:
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Phase 2: Start up

Essential Activities of Start-up



- Administrative set up
- Identify project startup team
- Resolve any pending award issues
- Prepare Project Charter
- Prepare PM/KM management and filing system
- Establish internal controls and compliance requirements
- Procurement Plan
- Year one plan



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Phase 2: Start up

Establishing Governance and Developing the Charter



Management Structure and Decision-Authority

- Scope
- Schedule
- Resources
- Escalations/Changes



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Phase 2:
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Phase 2: Tools: The Project Charter

The Management Structure and Decision Authority within the project

Project Charter

| | |
|---------------------|--|
| Project Name | |
| Project Sponsor(s) | |
| Proposed Start Date | |
| Proposed End Date | |

1. Project Background Rationale

•
•

2. Project Goals and Deliverables

•
•

3. Management Plan and Decision-Authority Matrix

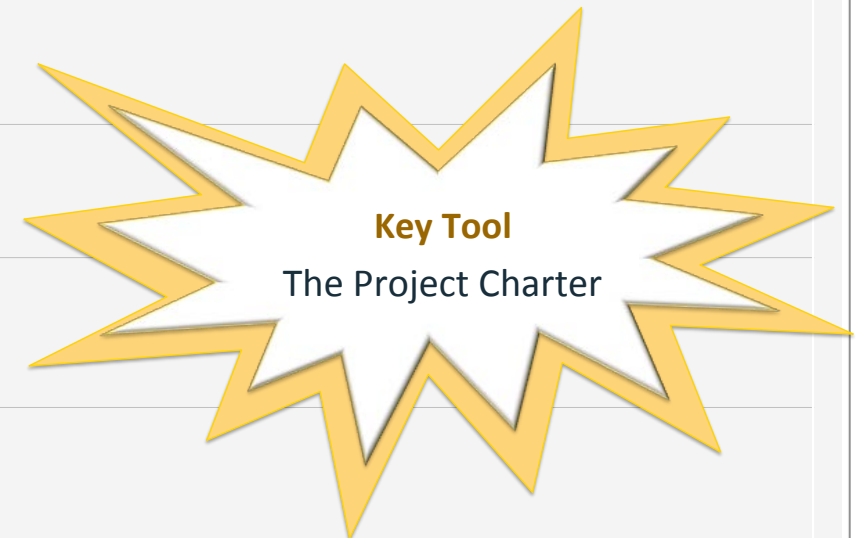
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4. Escalation and Change Control Process

•
•
•

5. Success Criteria/ Expected Outcomes & Benefits

•
•
•





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Phase 2:
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Phase 2: Start up

Benefits of a well-executed Start-up

- Rapidly, efficiently and effectively start up newly awarded programs.
- Establish expectations for startup and key milestones.
- Quickly establish a functional, country-based project management team with a functional relationship with organizational offices and support
- Fast-track priority areas of implementation while building in-country capacity to implement project activities.





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Phase 2: Start up

Start up: Timing

Preparation activities can begin in the pre-award stage when resources are approved by leadership.

An organization may choose to do pre-award Start up activities, if:

- There is a very high percentage of likelihood that the organization will receive the funds
- The proposal process has reached the BAFO stage.





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Phase 2 – Start up

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Phase 3:
Planning

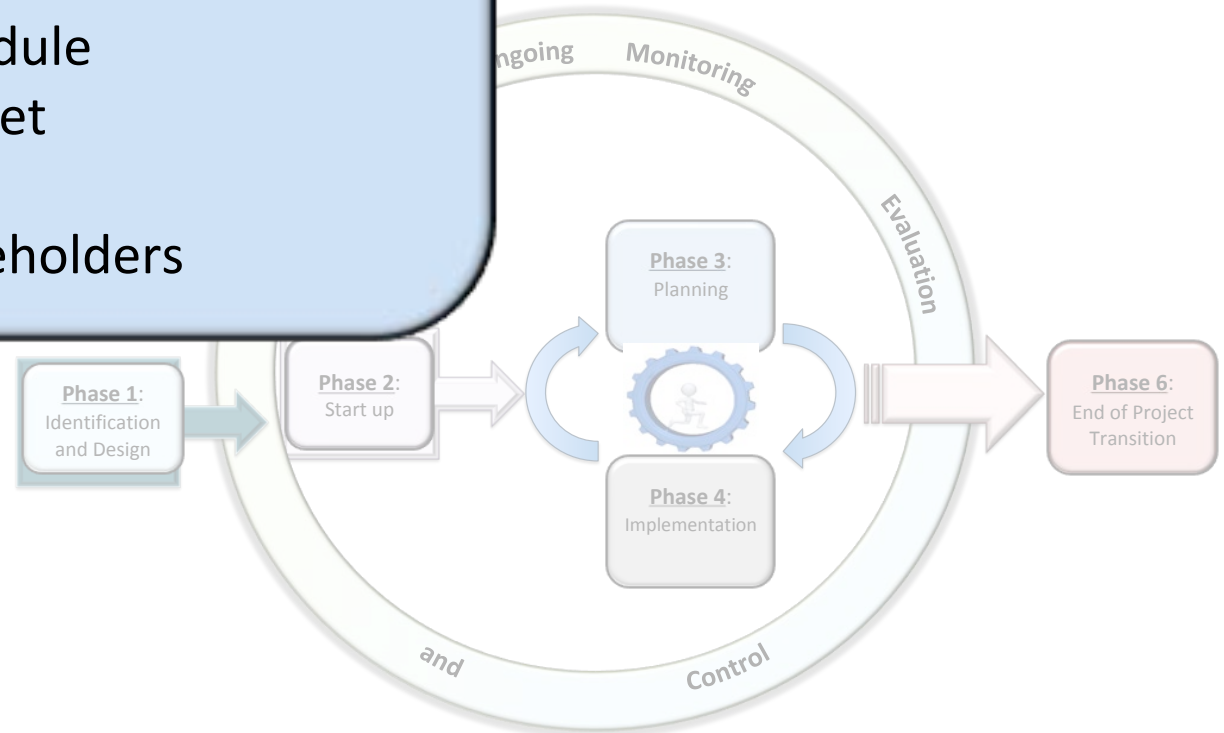
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Phase 3: Planning

Phase 3:
Planning

Phase 3: Deliverable: Implementation Plan

- Scope
- Schedule
- Budget
- Risks
- Stakeholders





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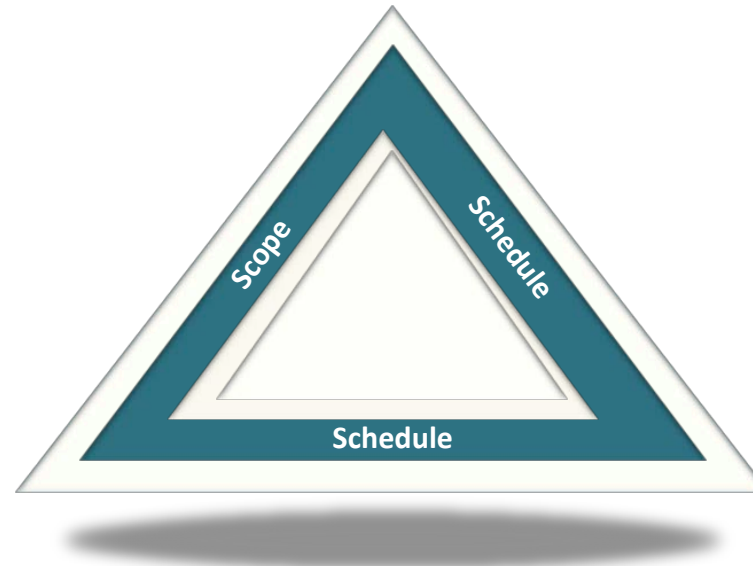
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Phase 3:
Planning

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Phase 3: Planning

Creating the detailed plan (scope, schedule, and budget)



Several different PM methodologies have evolved to help Project Manager take a high level implementation plan and create the detailed work plan, schedule and budget

Traditional Waterfall Approach

- WBS/Network Diagram
- Critical Path
- Gantt Chart

Agile Approach

- Kanban
- Scrums



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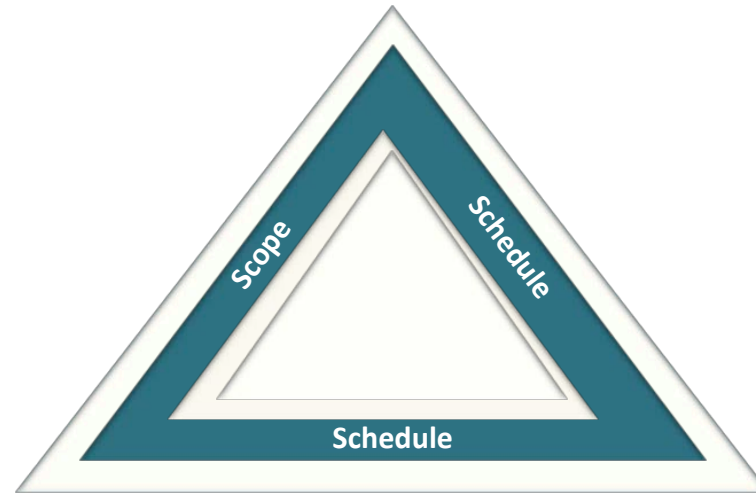
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Phase 3: Planning

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Several different PM methodologies have evolved to help Project Manager take a high level implementation plan and create the detailed work plan, schedule and budget

The Traditional Waterfall Approach

- WBS/Network Diagram
- Critical Path
- Gantt Chart

| Activity | Year 1 | | | | | | | | | | | |
|-------------------------------|--------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| Gather research/references | █ | █ | | | | | | | | | | |
| Select trainers | | █ | █ | | | | | | | | | |
| Seek Ministry approval | | | █ | █ | █ | | | | | | | |
| Develop curriculum | | | | █ | █ | █ | | | | | | |
| Select sites and participants | | | | | █ | █ | █ | | | | | |
| Print training documents | | | | | | █ | █ | | | | | |
| Schedule trainings | | | | | | | █ | █ | | | | |
| Invite key Ministry staff | | | | | | | | █ | █ | | | |
| Conduct training | | | | | | | | | █ | █ | | |

Gantt Chart (Schedule)



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Phase 3:
Planning

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Phase 3: Planning

Projects and Activities best suited for Traditional Approach

Conditions:

- Repeatable, knowable processes
 - Efficient feedback loops
 - The design is knowable from the beginning
 - Milestone focused projects
-

Pros:

- Adapts to shifting teams
- Forces structured organization (compliance)
- Allows for early design changes

Cons:

- Non-adaptive Design Constraints
- Closed to mid-process/client feedback
- Delayed testing period
- Milestone focused projects



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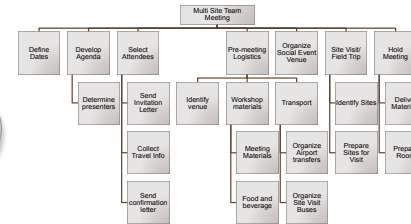
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Phase 3: Planning

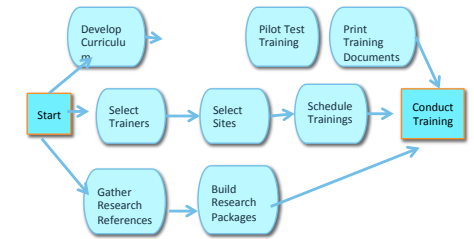
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Phase 3: Planning

The traditional approach to scope, schedule and resource planning



Work Breakdown Structure (WBS)



Sequence (Network) Diagram

| Activity | Year 1 | | | | | | | | | | | |
|-------------------------------|--------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| Gather research/references | █ | █ | | | | | | | | | | |
| Select trainers | | | █ | █ | | | | | | | | |
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| Develop curriculum | | | | █ | █ | █ | | | | | | |
| Select sites and participants | | | | | █ | █ | | | | | | |
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Gantt Chart (Schedule)



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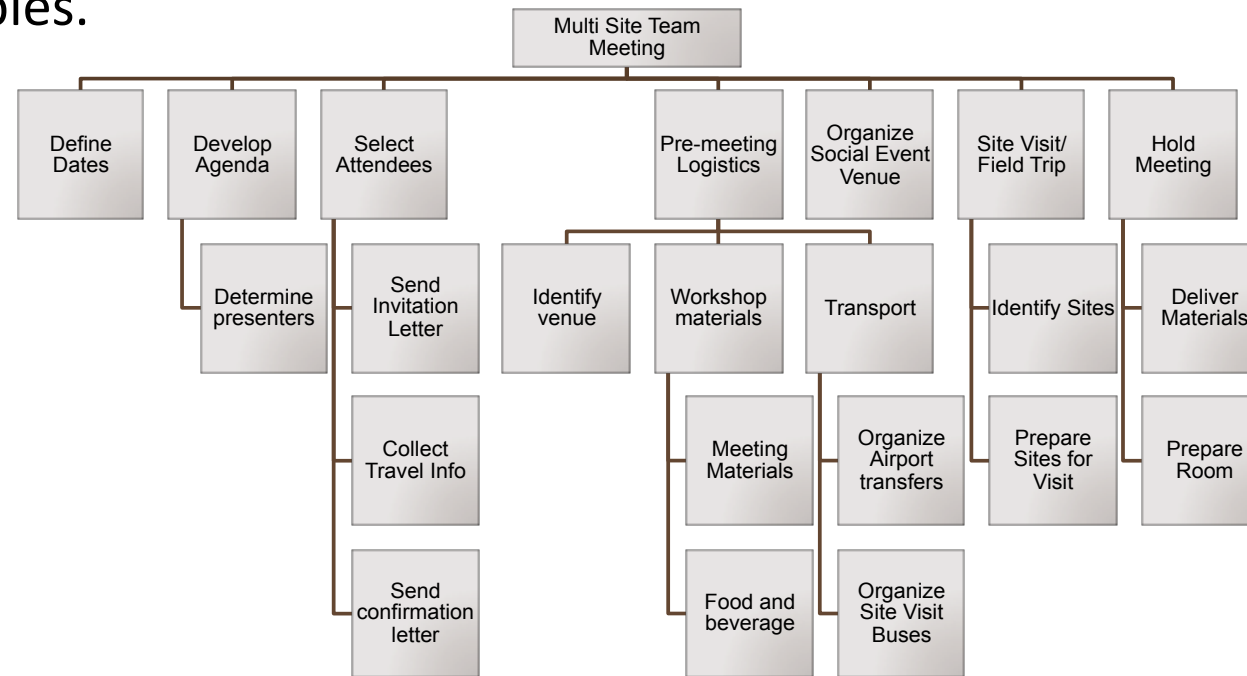
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Planning

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The Work Breakdown Structure

The WBS breaks down the elements and steps required to meet project deliverables.



Once broken down, the tasks can be scheduled, resources allocated and roles assigned, as well as analyzed for dependencies and risks.



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The Work Breakdown Structure





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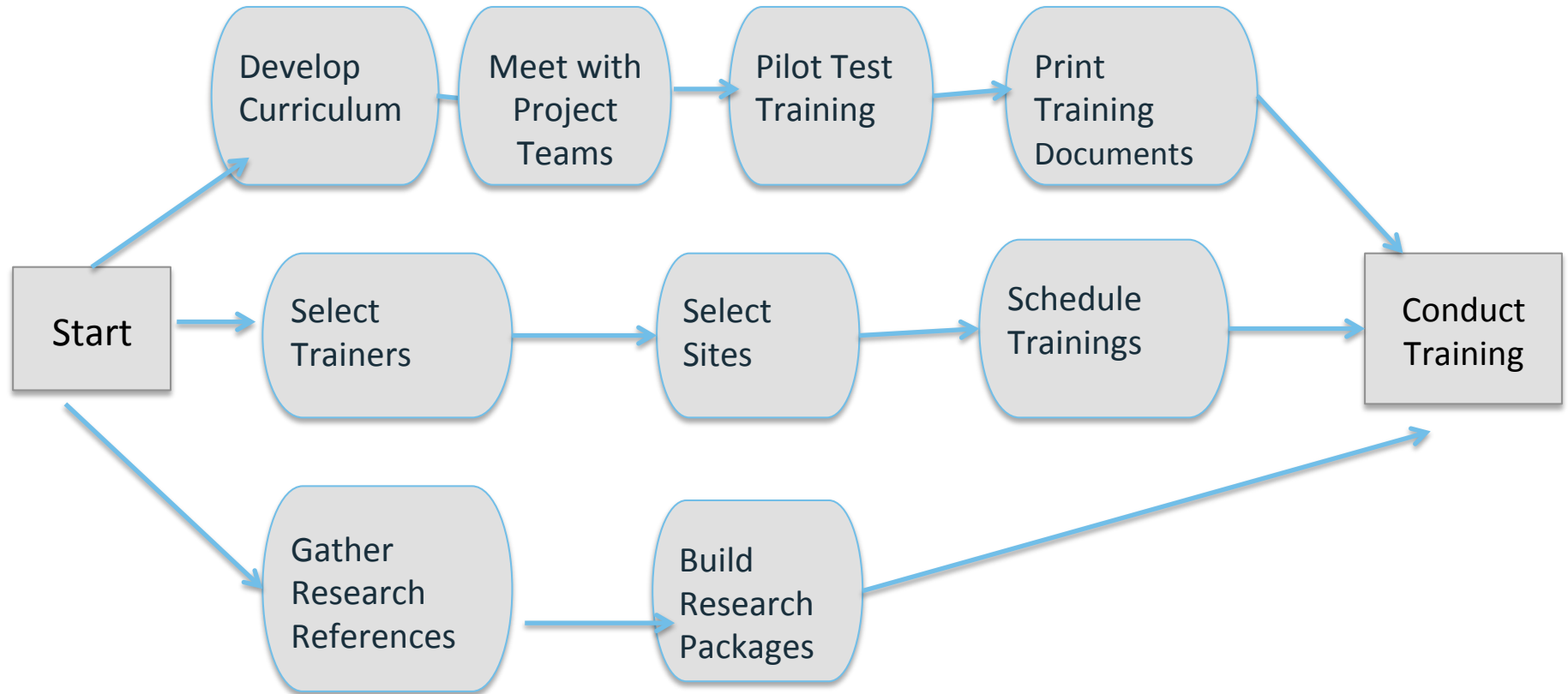
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Sequencing the WBS components: The Network Diagram





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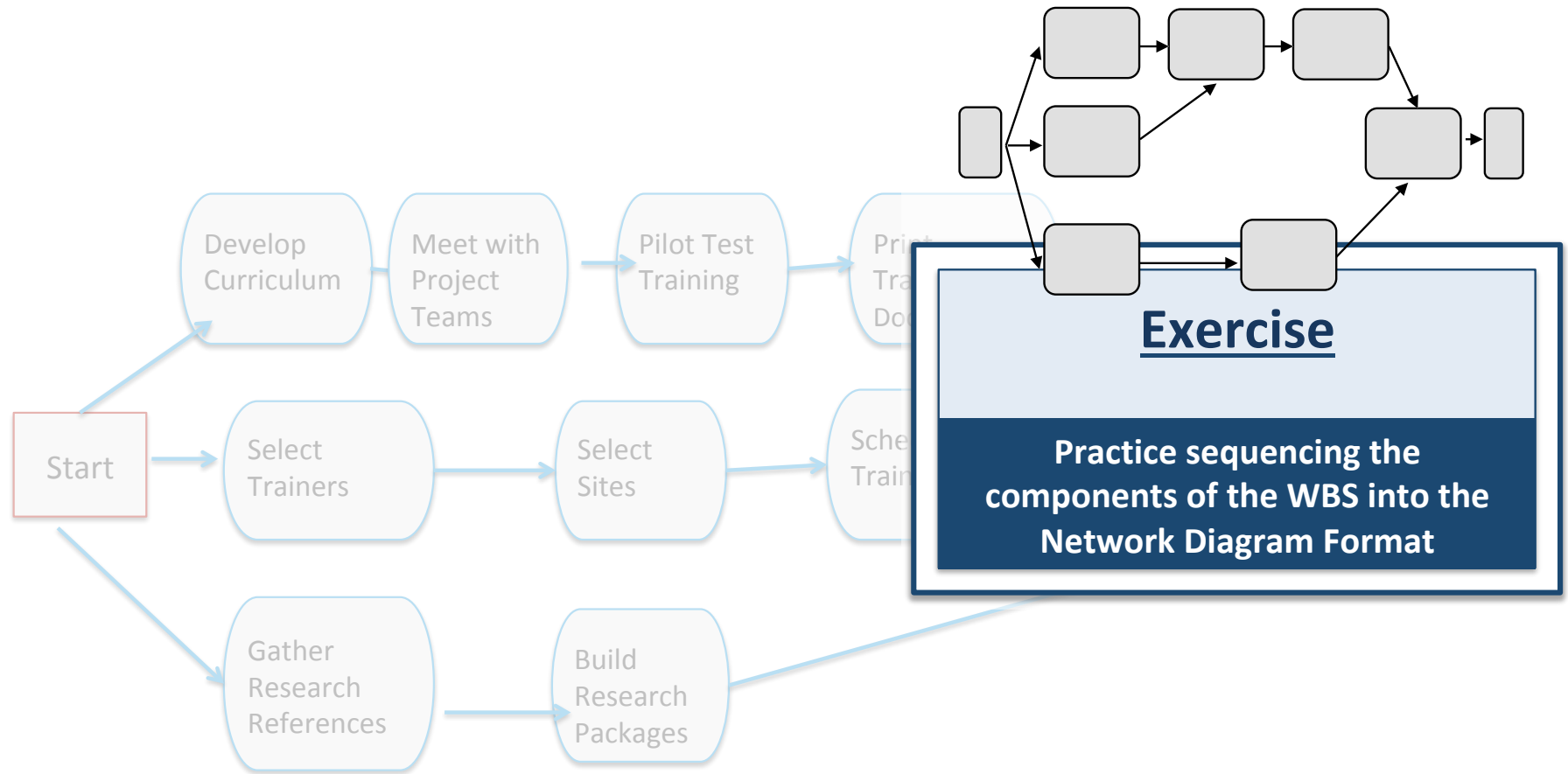
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Sequencing the WBS components: The Network Diagram





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The Network Diagram: Estimating Duration

Each step in the network diagram is a task that takes resources and time to complete.



To build a schedule, we analyze the resource requirements and availability for each step and then estimate it's duration (in work day unit, not LOE)



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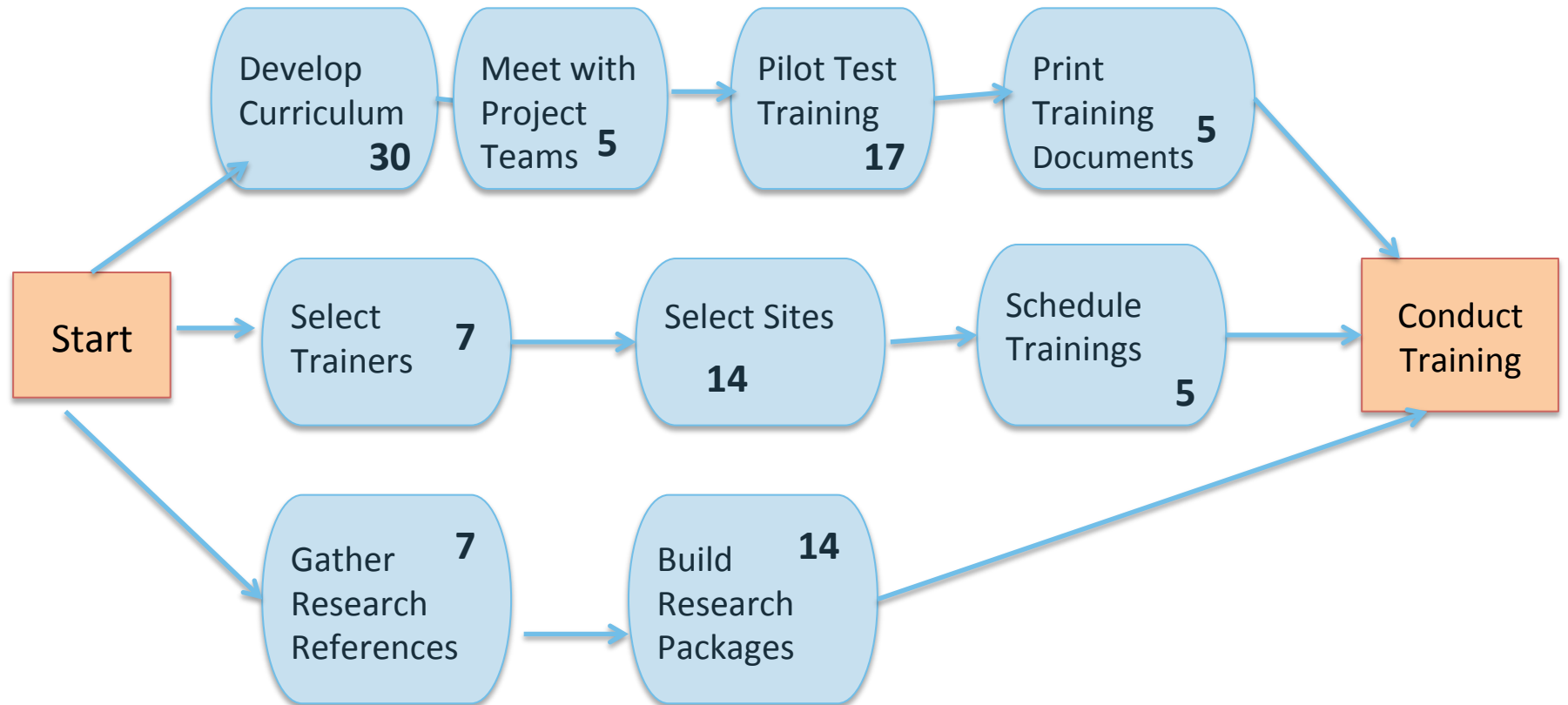
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Adding duration to the network diagram: an example





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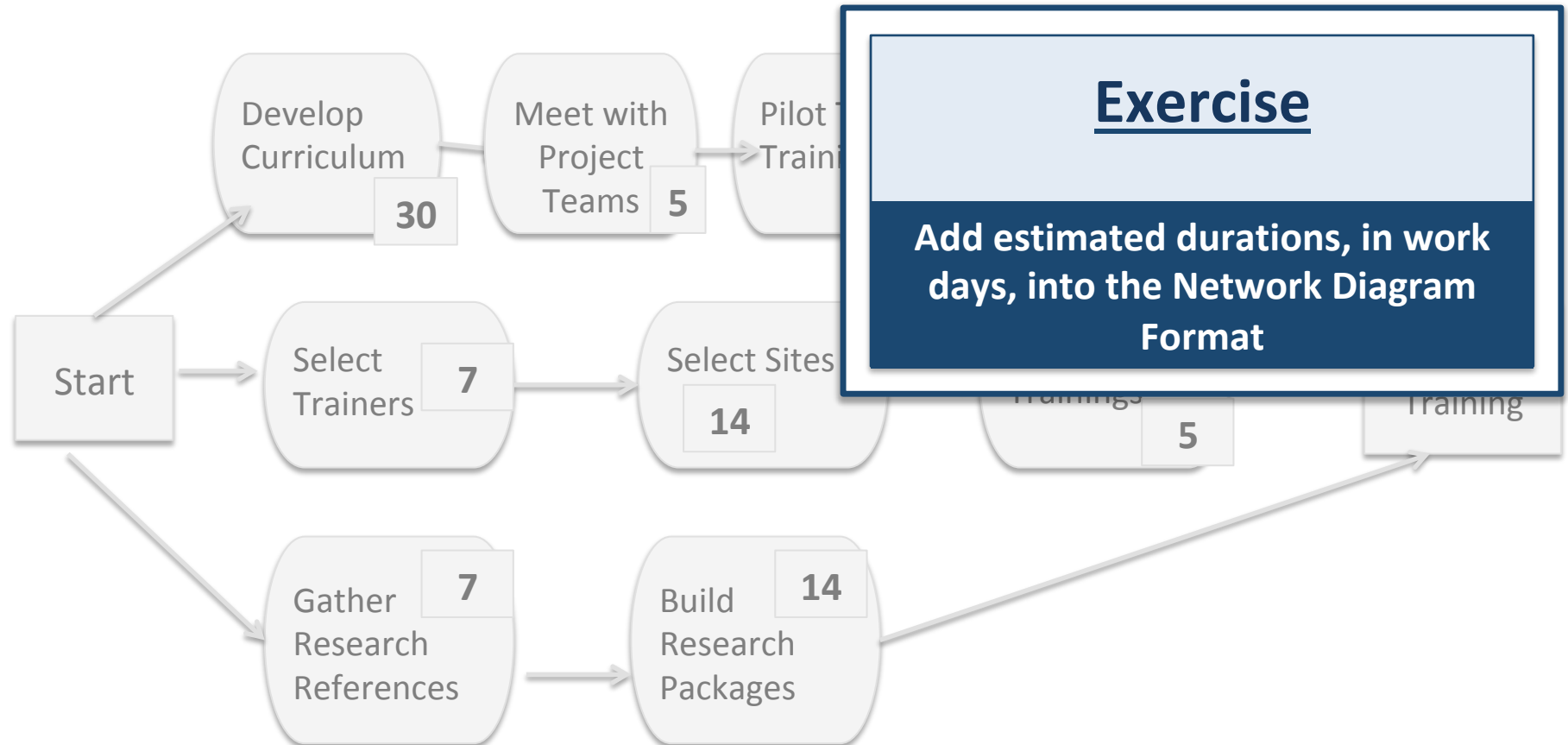
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Adding duration to the network diagram: an example





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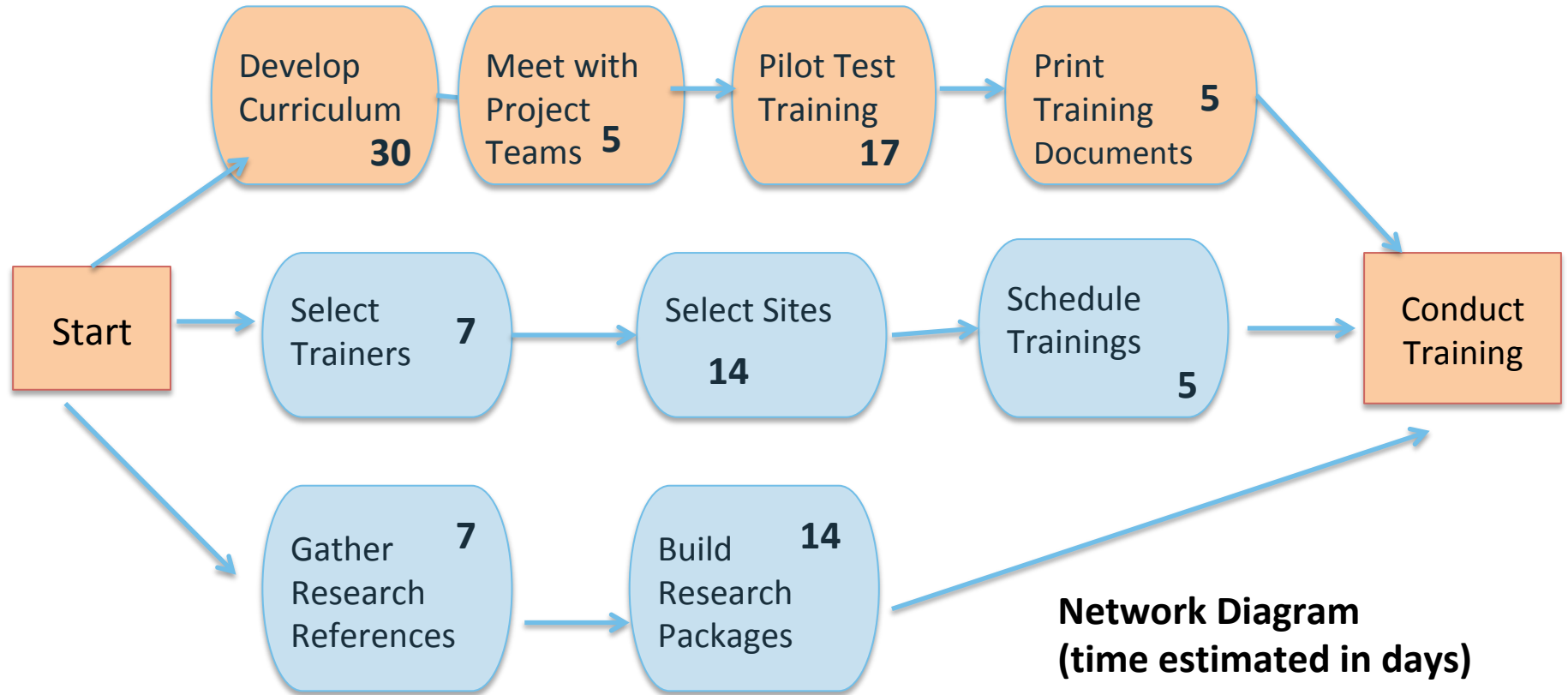
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Understanding The Schedule's Critical Path





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Understanding The Schedule's Critical Path



Prioritizing & Decision-Making

Knowing if delays are minor or major to the project schedule



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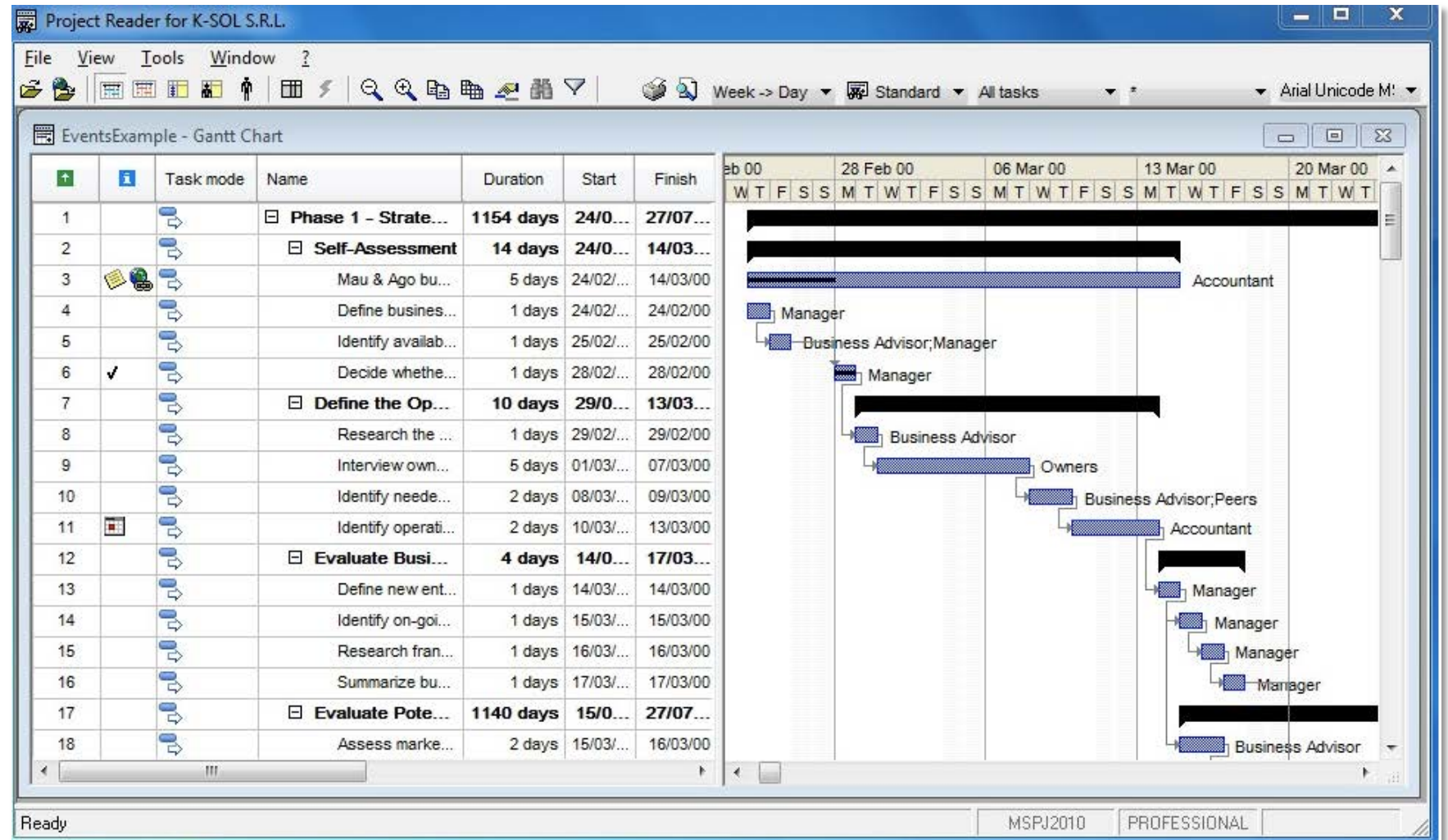
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Gantt Chart: Visualizing and Communicating the Schedule:





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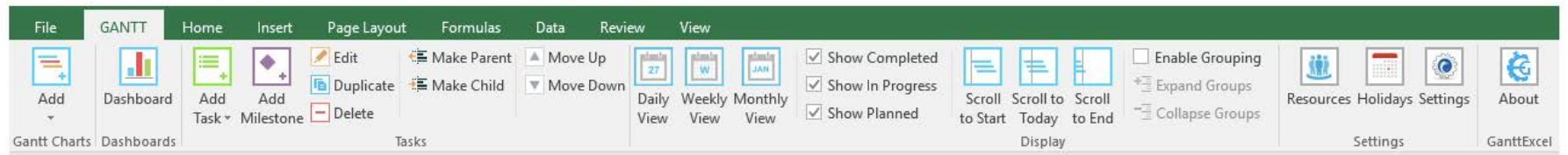
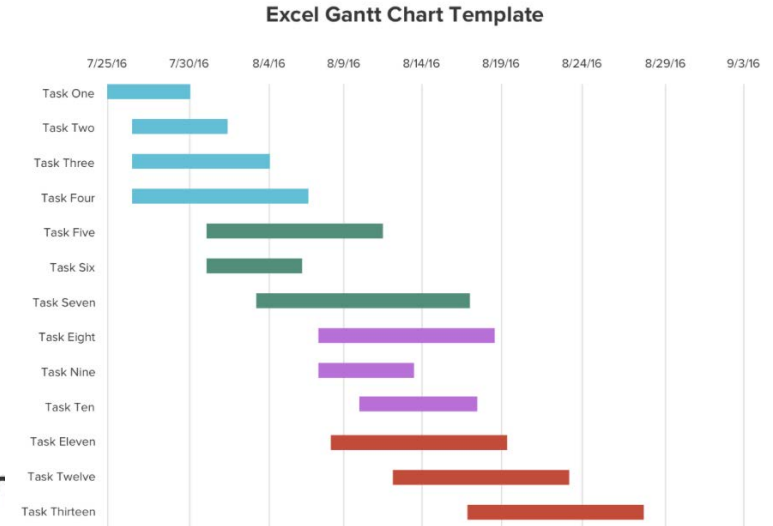
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Phase 3 - Planning: *in action...* Schedule Development Tools: *Excel/Gantt*



Gantt Chart Excel - Dowr



Click on the [link](#) below to download the free version.

[Gantt Chart Excel Template - Free - v2.50](#)

Compatible with Excel 2007, 2010, 2013 & 2016 on Windows and Excel 2016 on macOS



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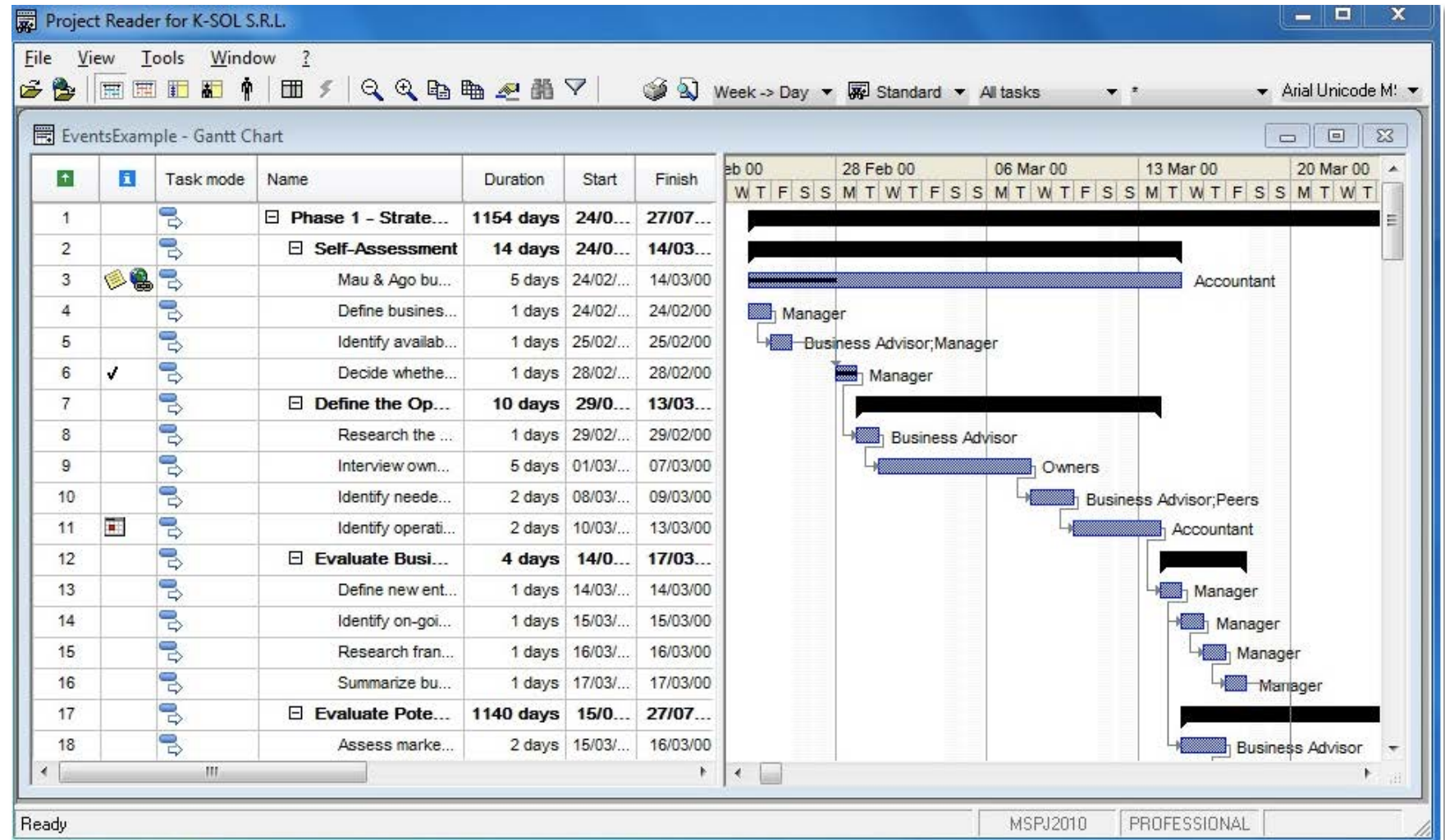
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Phase 3 - Planning: *in action...*

Schedule Development Tools: MS Project





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Planning**

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Phase 3 - Planning: *in action...* Schedule Development Tools: Smartsheet

| Task Name | Assigned | Status | Due Date | \$ Each | Qty | Budget | Actual | Comments |
|-----------------------------------|----------|--------|----------|---------|-----|----------|---------|------------------------------------|
| Spring Fundraising Event | | | 05/19/12 | | | \$25,163 | \$5,750 | |
| Event Theme & Ceremony | | | | | | \$5,900 | \$5,750 | |
| Develop theme, tagline | Kathy | ● | 04/07/12 | \$0 | | \$0 | | |
| Decide on "main event" | Kathy | ● | 03/28/12 | \$0 | | \$0 | | |
| Develop colors/images | Sarah | ● | 04/12/12 | \$0 | | \$0 | | Double check brand guidelines |
| Set schedule / timing | Kathy | ● | 04/16/12 | \$0 | | \$0 | | Like last year, minus video |
| Awards ceremony | Sarah | ● | 04/16/12 | \$5,000 | | \$4,750 | | Ballroom B |
| Create Presentation | Sarah | ● | 04/12/12 | \$400 | | \$500 | | Needs microphone, AV |
| Select and book MC | Pia | ● | 04/12/12 | \$500 | | \$500 | | Brian to check Judy's availability |
| Invitations | | | | | | \$3,000 | \$0 | |
| Email Invitation Design | Sarah | ● | 04/12/12 | \$0 | | \$0 | | inhouse |
| Email Invitation List | Pia | ● | 04/12/12 | \$1.00 | 500 | \$500 | | |
| Reminder Email Copy | Pia | ● | 04/12/12 | \$0 | | \$0 | | |
| Reminder Email Design | Sarah | ● | 04/08/12 | \$0 | | \$0 | | |
| Print invitation: Design | Sarah | ● | 04/05/12 | \$0 | | \$0 | | 3 options prepped |
| Print invitation: Printing | Sarah | ● | 04/26/12 | \$2,100 | | \$2,100 | | AZ proposal in, approved |
| Invitations Drop in Mail | Pia | ● | 04/30/12 | \$0.80 | 500 | \$400 | | prepaid postage |
| Collateral and Promotion | | | | | | \$1,350 | \$0 | |
| Banners | Sarah | ● | 04/15/12 | \$1,350 | | \$1,350 | | Skylark needs deposit 3/10 |
| Agenda booklet: Design | Sarah | ● | | \$0 | | \$0 | | 16 pages |
| Agenda booklet: Printing | Sarah | ● | | \$0 | | \$0 | | AZ Printing proposal |
| Menu | Pia | | 04/21/12 | | | \$8,000 | \$0 | |
| Hors d'oeuvres (cold) | | | | \$4.00 | 250 | \$1,000 | | |
| Hors d'oeuvres (hot) | | | | \$5.00 | 250 | \$1,250 | | |
| Salad | | | | \$8.00 | 250 | \$2,000 | | |
| Entree | | | | \$15.00 | 250 | \$3,750 | | |
| Cocktail reception | Sarah | | | | | \$3,438 | \$0 | |
| Liquor selections | | | | \$6.00 | 250 | \$1,500 | | |



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Phase 3: Planning: Resource Planning

Activity Based Budgeting

ACTIVITY BUDGET BY QUARTER

PROJECT:
BUDGETING PERIOD:

PROGRAM AREA:
EXCHANGE RATE:

INSTRUCTIONS: ENTER ALL AMOUNTS IN LOCAL CURRENCY; ENTER INFORMATION IN PURPLE CELLS ONLY

| | | | | | | | Quarter start date: | <input type="text"/> | | |
|----------------------------------|----------------------|--------|---|----------------------|--------|---|----------------------|----------------------|---|--|
| | | | | | | | Quarter end date: | <input type="text"/> | | |
| | | | | | | | TOTAL COST PER EVENT | QTR1 # EVENTS | | |
| Name | Unit Cost | Amt | | Amt | | | | | | |
| ACTIVITY 1: | | | | | | | | | | |
| CONSULTANTS | | | | | | | | | | |
| Consultant Fee: | <input type="text"/> | /day | x | <input type="text"/> | days | x | <input type="text"/> | persons | 0 | |
| Consultant Costs: Per diem | <input type="text"/> | /day | x | <input type="text"/> | days | x | <input type="text"/> | persons | 0 | |
| Consultant Costs: Travel/Airfare | <input type="text"/> | /trip | x | <input type="text"/> | trips | x | <input type="text"/> | persons | 0 | |
| Consultant Costs: | <input type="text"/> | /day | x | <input type="text"/> | days | x | <input type="text"/> | persons | 0 | |
| Miscellaneous | <input type="text"/> | /trip | x | <input type="text"/> | trips | x | <input type="text"/> | persons | 0 | |
| TOTAL CONSULTANTS | | | | | | | 0 | 0 | | |
| PRINTING | | | | | | | | | | |
| General copying for activity | <input type="text"/> | /event | x | <input type="text"/> | | x | <input type="text"/> | | 0 | |
| Printed Materials: | <input type="text"/> | /copy | x | <input type="text"/> | copies | x | <input type="text"/> | | 0 | |
| Printed Materials: | <input type="text"/> | /copy | x | <input type="text"/> | copies | x | <input type="text"/> | | 0 | |
| Printed Materials: | <input type="text"/> | /copy | x | <input type="text"/> | copies | x | <input type="text"/> | | 0 | |



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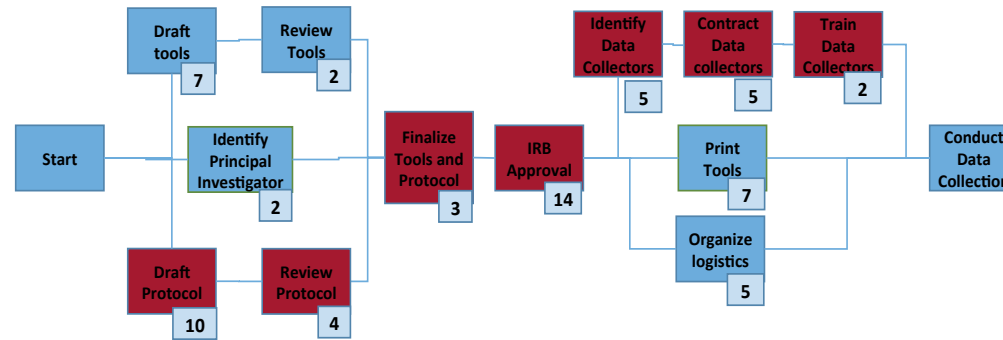
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: Activity Based Budgeting



Estimate and budget costs along the project schedule of tasks and activities



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Procurement Planning



Review your award closely. Failure to identify and budget for necessary supplies or to account for approval time and processing can often lead to significant budget and scheduling issues.

- Know your internal Procurement Resources (Manuals and People)
- Work with technical and finance teams – ensure all needed supplies, materials and equipment are in budget
- Develop a procurement forecasting plan



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Procurement Planning



Looking at the scope of activities in the network diagram, what are your material, supplies and equipment needs?

- *Are they allowable?*
- *Available?*
- *In Budget?*
- *When will you need them?*



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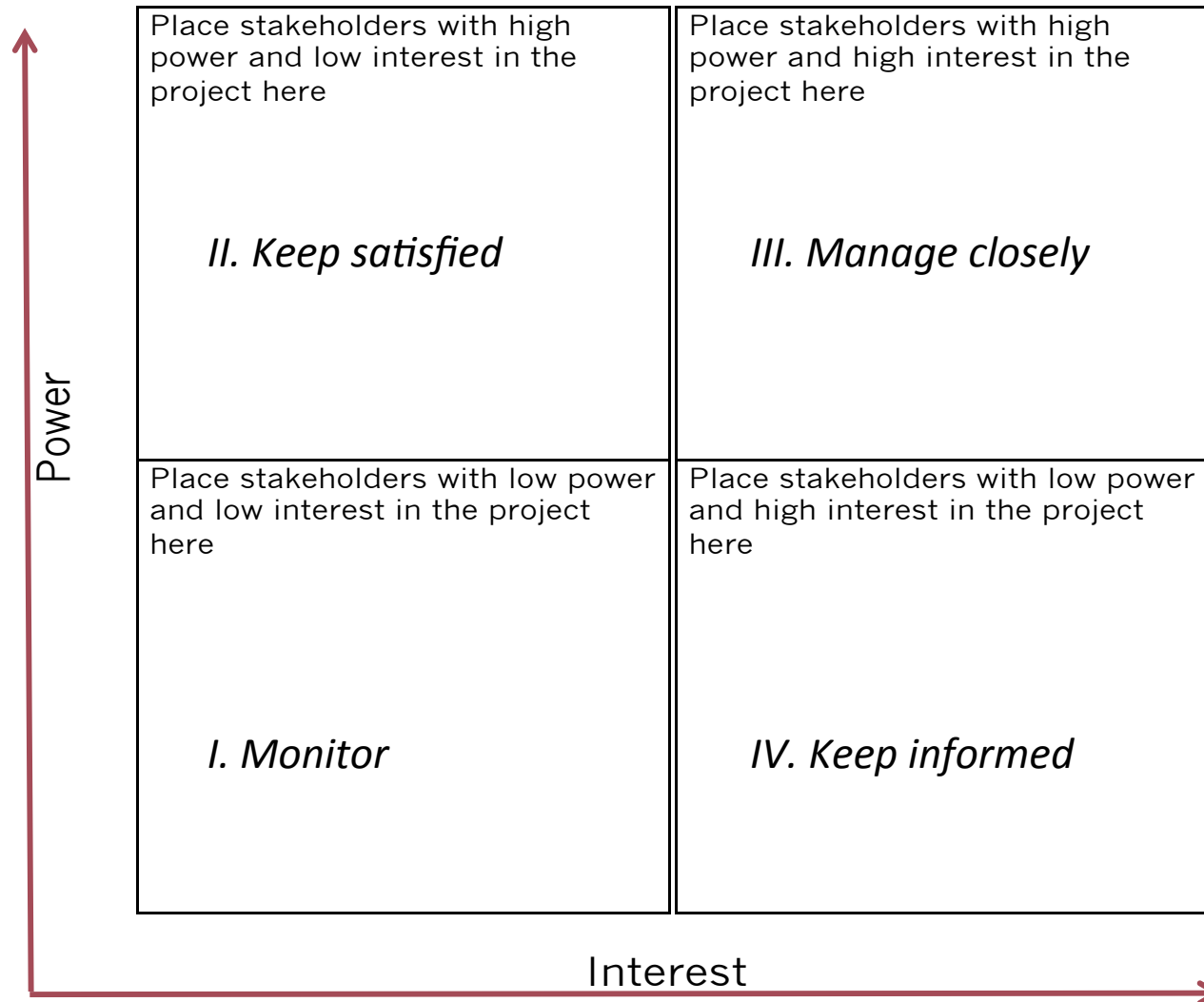
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Phase 3: Planning: Stakeholder & Communication

Stakeholder Analysis Matrix





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Phase 3: Planning: Stakeholder & Communication

Stakeholder Communication Plan

| Audience (Who) | Message (What) | Medium (How) | Schedule (When) | Responsible |
|----------------|----------------|--------------|-----------------|-------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |



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Phase 3: Planning: Stakeholder & Communication

Stakeholder Communication Plan: An example

| Audience (Who) | Message (What) | Medium (How) | Schedule (When) | Responsible |
|--------------------------------------|---|---|--|---|
| Donor(s) | Progress reports, Status reports, Strategy Updates, Budget Reports, Success Stories | Meetings: Formal Paper-Based Reports, Emails/Email Blasts, Presentations, Newscasts | Quarterly: As required by award and as needed | Country Director/COP |
| Government (MOH) | Project Overview, Objectives, Implementation Scope, Risk, Timelines, Status Reports, Changes to Implementation Plan | Meetings, Presentations, Emails | Monthly Meetings: As required by award and as needed | Project Director/COP, Technical Lead(s) for Technical Departments |
| Technical Advisory Group | Project Overview, Objectives, Implementation Scope, Risk, Timelines, Status Reports, Technical Standards, Implementation strategies | Meetings, Workshops, Technical Updates, Emails | Monthly Meetings: As required by award and as needed | Project Director/COP, Technical Leads |
| Jhpiego GPO, TLO, Regional Directors | Status Reports, Progress Reports, Strategies, Budget, Success Stories, Issues | Email, Reports, Program Reviews, Success Stories | Quarterly: As required by award and as needed | Country Directory, COP, Project Director |
| Project Team | Goals, Objectives, Project Scope, Compliance Requirements, Roles and Authority, Forms, Deadlines, Change Management | Meetings, Email, Training Sessions | Regularly Scheduled Project Team Meetings, Staff Retreat, as needed. | COP/Project Director |



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Phase 3:
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Phase 3: Planning: Risk

- Risk Identification
- Risk Assessment
- Risk Response Planning
- Risk Monitoring and Control



Risk Planning & Management
Risk Planning Steps



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Phase 3: Planning: Risk Planning Steps

Risk Assessment Areas

Strategic/Commercial

- Failure of suppliers to meet contractual commitments
- Fraud/theft
- Implementing Partners failing to deliver the desired outcome

Economic/Financial/Market

- Exchange rate fluctuation
- Interest rate instability
- Inflation
- Market developments adversely affect plans.

Organizational/Management/Human Factors

- Poor leadership
- Inadequate authority of key personnel to fulfill roles
- Poor staff selection procedures
- Lack of clarity over roles and responsibilities
- Personality clashes
- Lack of operational support

Legal and regulatory

- New or changed legislation invalidates project assumptions
- Failure to obtain appropriate approval (e.g. planning, consent)
- Unsatisfactory contractual arrangements

Environmental

- Natural disasters
- Sudden changes in weather patterns

Political

- Change of government or government policies
- War and disorder
- Adverse public opinion/media intervention
- Interference by politicians in development decisions

Project Management Risk

- Inadequate tracking and control response
- Unrealistic schedules
- Poorly managed logistics
- Delays in the approval of project documents



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Phase 3: Planning: Risk Planning Steps

Risk Assessment

| | Risk Assessment Matrix | Impact | | | | |
|-------------|--------------------------|---------------|-------------|-------------|------------|--------------|
| | | Insignificant | Marginal | Moderate | Critical | Catastrophic |
| Probability | Very Likely (81% - 100%) | Light Green | Yellow | Light Pink | Red | Dark Red |
| | Likely (61% - 80%) | Teal | Light Green | Yellow | Light Pink | Dark Red |
| | Possible (41% - 60%) | Teal | Light Green | Yellow | Light Pink | Light Pink |
| | Unlikely (21% - 40%) | Teal | Light Green | Light Green | Yellow | Light Pink |
| | Very Unlikely (1% - 20%) | Teal | Teal | Light Green | Yellow | Light Pink |



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Phase 3: Planning: Risk Planning Steps

Risk Management

- Make risk management **part** of your project
- **Identify** risks early
- Clarify **ownership**
- **Prioritize** using probability & impact
- **Communicate** about risks
- Take **action** and manage
- **Track** risks and mitigation actions





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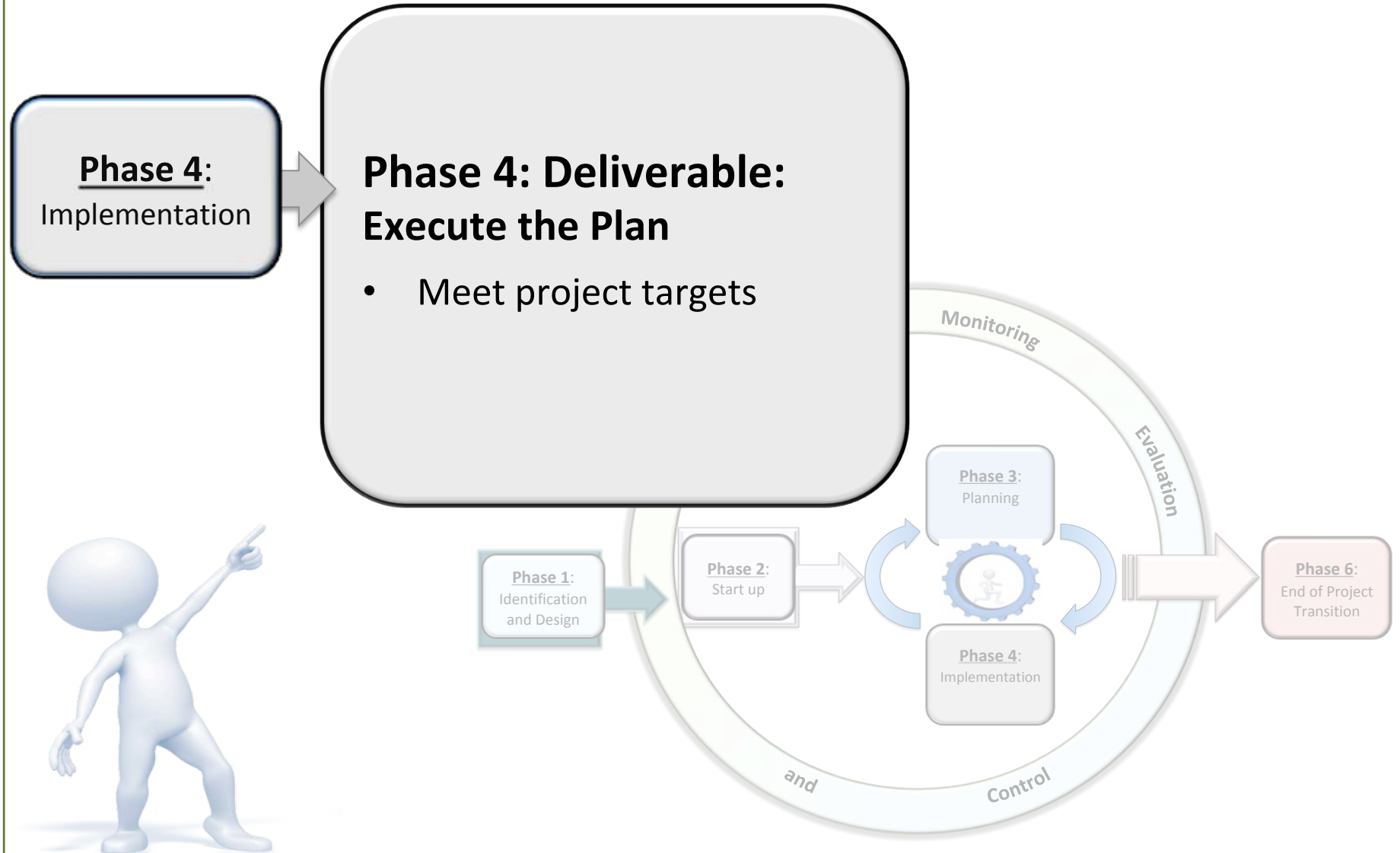
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Phase 4: Implementation





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Phase 4:
Implementation

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Phase 4: Implementation: *Executing the plan*

- Executing the plan, requires the PM to manage:
 - The implementation team
 - Any issues that arise
 - Procurement and the supply chain



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Phase 4: Implementation:

Executing the plan: Managing the Team

In order to promote a highly productive team, the Project Manager must be skilled at:

- Communicating vision
- Encouraging shared ownership
- Moving agendas within & outside the organization
- Managing situations where there is no hierarchical authority





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Phase 4: Implementation:

Executing the plan: Managing Issues

- Identify and track the issue
- Analyze the issue
- Communicate the issue
- Control the issue



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Phase 4: Implementation: *Executing the plan: Internal Controls*

Internal Controls: Policies and Procedures that:

- Promote the effectiveness and efficiency of operations
- Increase the reliability of project outcomes
- Promote compliance with applicable laws and regulations
- Protect organization resources, both physical (e.g., machinery and property) and intangible (e.g., reputation, intellectual property)
- Reduce the risk of fraud and corruption



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Phase 4: Implementation: *Executing the plan: Managing the Supply Chain*

Elements of the Supply Chain:

- Procurement Management
- Logistics Management
- Asset Management





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Phase 4: Implementation: *Managing the Supply Chain: Procurement*



- Procurement planning
- Identification of the providers
- Selection, negotiation and award



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Phase 4: Implementation: *Managing the Supply Chain: Logistics*

- Inventory
- Materials Acquisition and transport
- Fleet Management





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Phase 4: Implementation: *Managing the Supply Chain: Asset Management*

- Define assets
- Record assets
- Label assets
- Maintain asset record
- Safeguard assets
- Monitor assets
- Manage assets through the implementation agency
- Dispose of assets





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Phase 4 – Implementation

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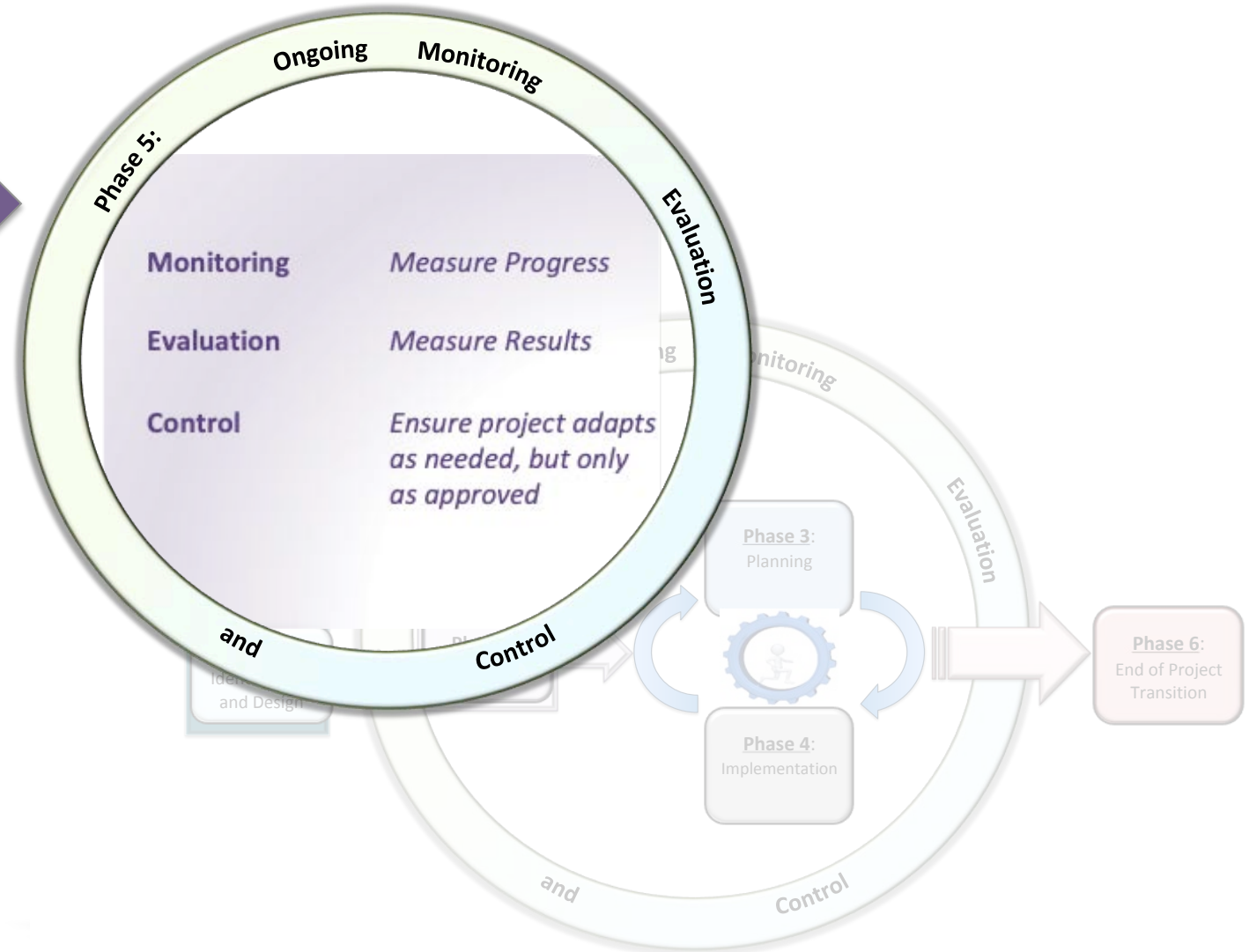
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Phase 5:
Monitoring, Evaluation and Control

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Phase 5: Monitoring, Evaluation and Control

Phase 6:
Close and Transition





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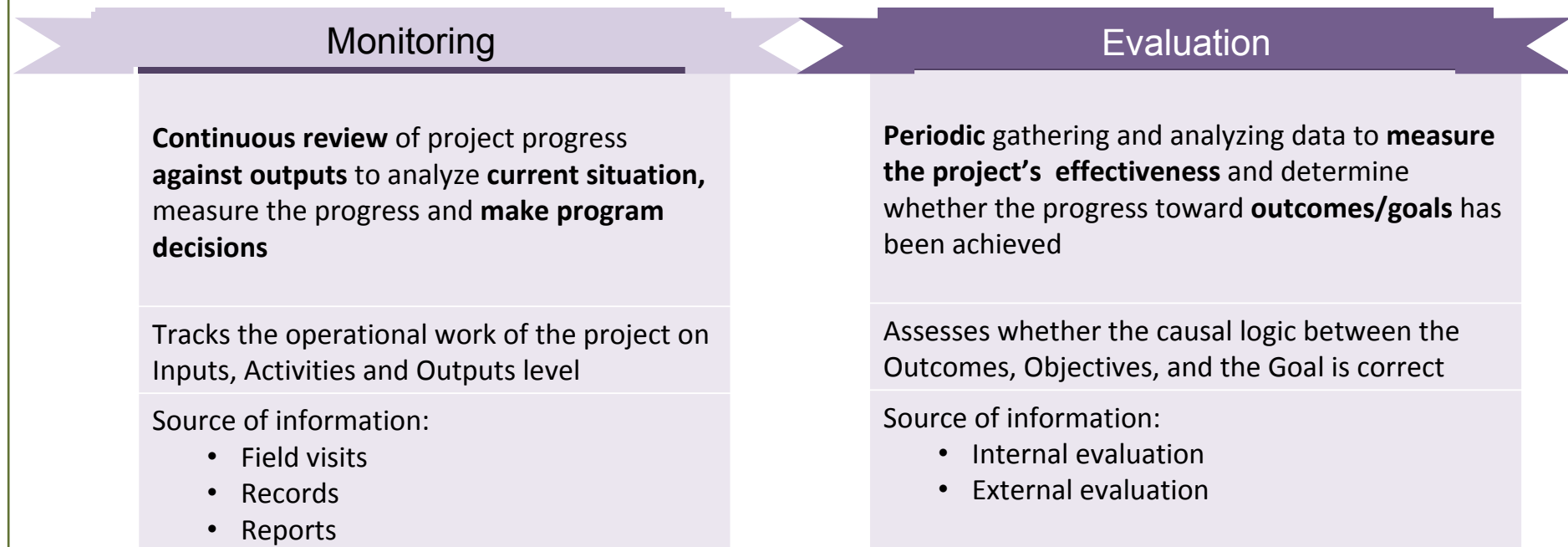
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Phase 5: Monitoring, Evaluation and Control

Comparing Monitoring vs. Evaluating





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Phase 5: Monitoring, Evaluation and Control

Components of the Monitoring & Evaluation Plan





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Phase 5 – Monitoring, Evaluation and Control

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Phase 6:
Close and
Transition

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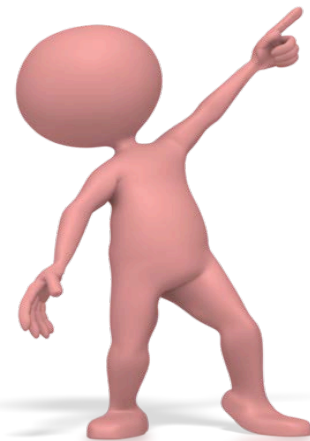
Phase 6: Close and Transition



Phase 6:
Close and
Transition

Phase 6: Deliverable: Final Report and Close out

- Final Report and Evaluation, if indicated
- Closeout Plan



Phase 1:
Identification
and Design

Phase 2:
Start up

Planning

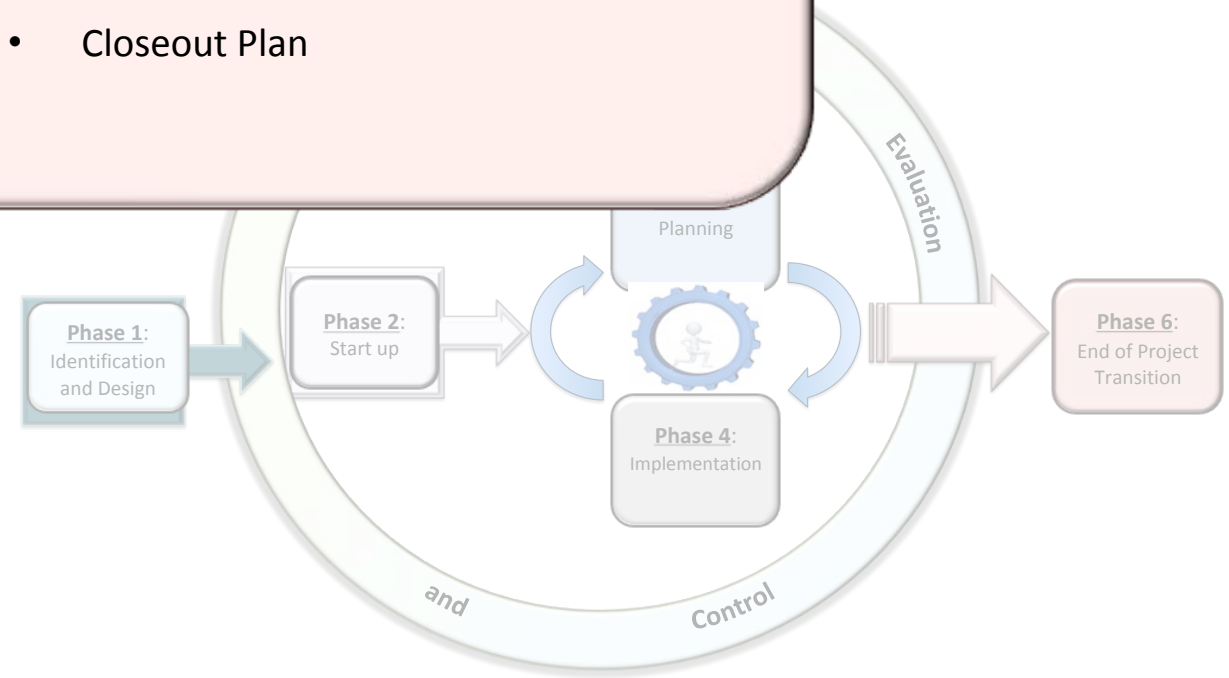
Phase 4:
Implementation

Evaluation

Phase 6:
End of Project
Transition

and

Control





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Phase 6:
Close and
Transition

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Phase 6: Close and Transition

Key Activities in Close and Transition



Articulate and Execute the End-of-Project Transition Plan



Verify (Close) the Project Scope and the Acceptance of Deliverables



Complete the Administrative, Financial and Contractual Closure of the Project



Communicate the end of the project



Complete end of project learning



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Close and
Transition

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Phase 6: Close and Transition

Last Close out activity: Celebrate!





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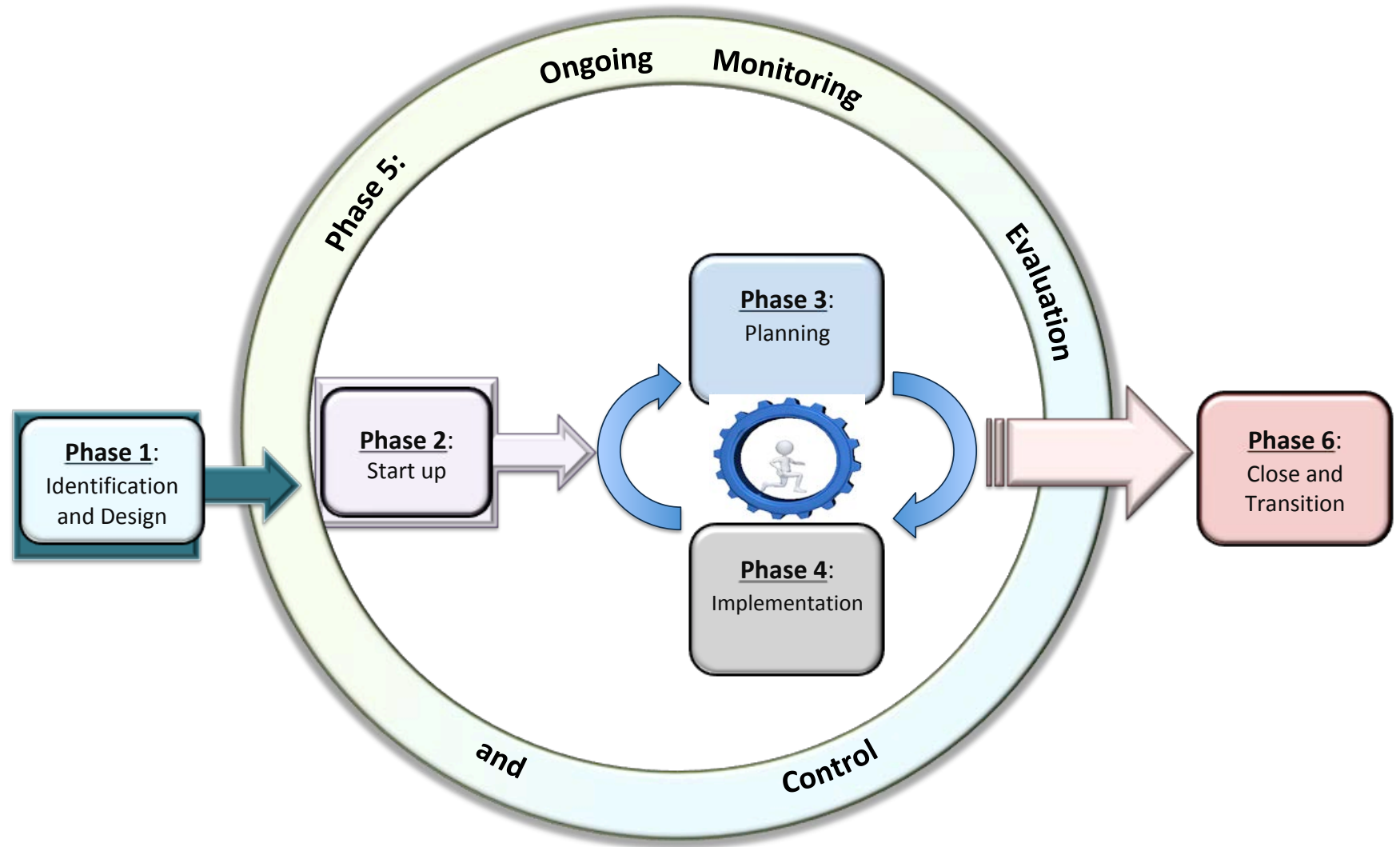


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The fundamentals you need to understand and manage projects

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*The fundamentals you need
to understand and manage
projects*

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