

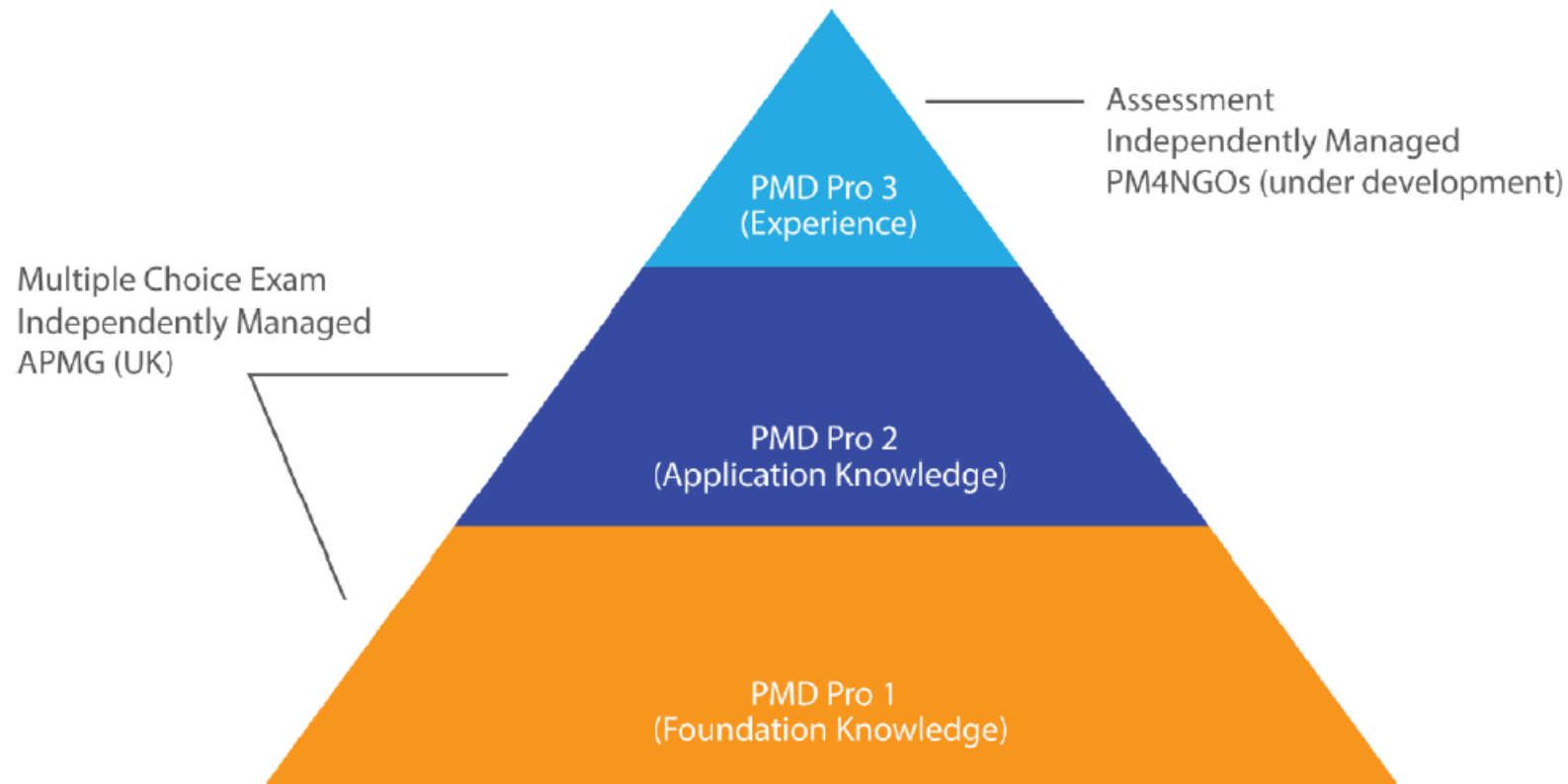
WELCOME TO PMD Pro Certification Program

A 4 Day advanced Program on Project Management towards PMD Pro

Rev1.3 Dt 20.2.2018

The PMD Pro Certification Program

Figure 1: PMD Pro is the PM4NGOs Certification Program



The Five Principles of Project Management

1. Project Management is Balanced!
2. Project Management is Comprehensive!
3. Project Management is Integrated!
4. Project Management is Participatory!
5. Project Management is Iterative!

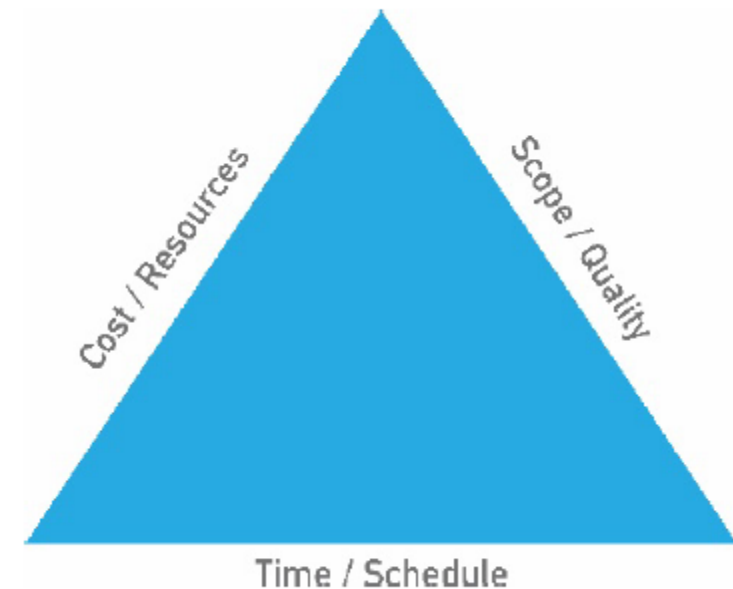
Triple Constraints

Scope/Quality – What are the products/services that the project will produce and what is the work required to produce these deliverables?

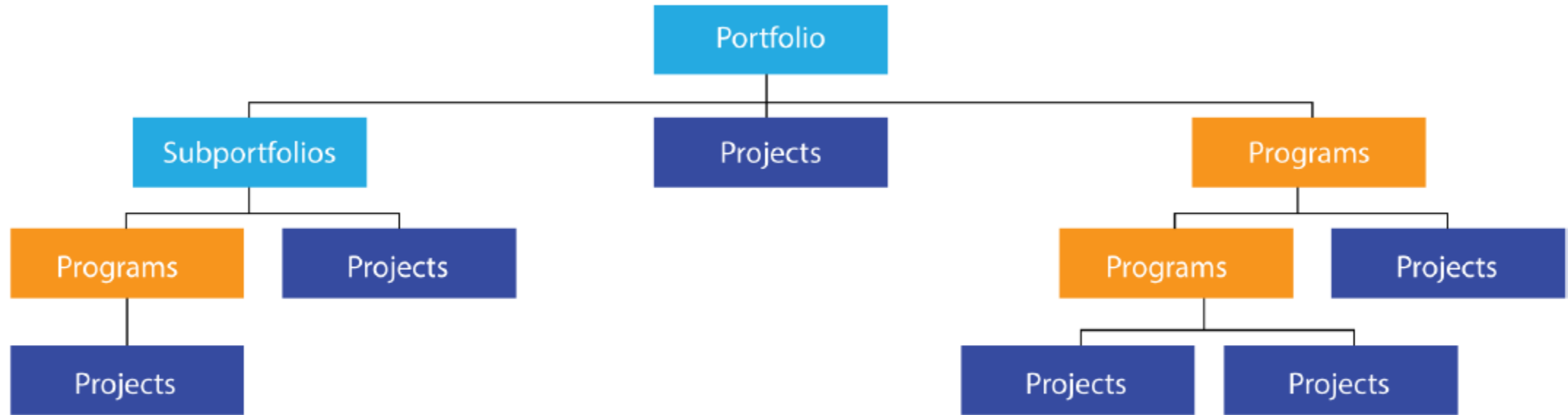
Cost/Resources – What money, materials and effort are available to deliver the project product/services and to complete the comprehensive work of the project?

Time/Schedule – What is the amount of time required to complete the components of the project?

Figure 4: The Project Constraint Triangle



Projects, Programs and Portfolios



The Art and Science of Project Management

- The softer “art” skills relating to human behavior and interactions
- The art of project management focuses on the people elements of a project
 - skills that enable project managers to lead, enable, motivate and communicate

- The harder “science” skills that focus on the technical management of inputs and outputs
- The science of project management focuses on :
 - the planning, estimating, measuring and controlling of work.

The PMD Pro Competency Model



Technical



Leadership/Interpersonal



Personal/Self-
Management



Development Sector
Specific

Project life cycle phases identify the logical sequence of activities that accomplish the project's goals or objectives.

Project Lifecycle

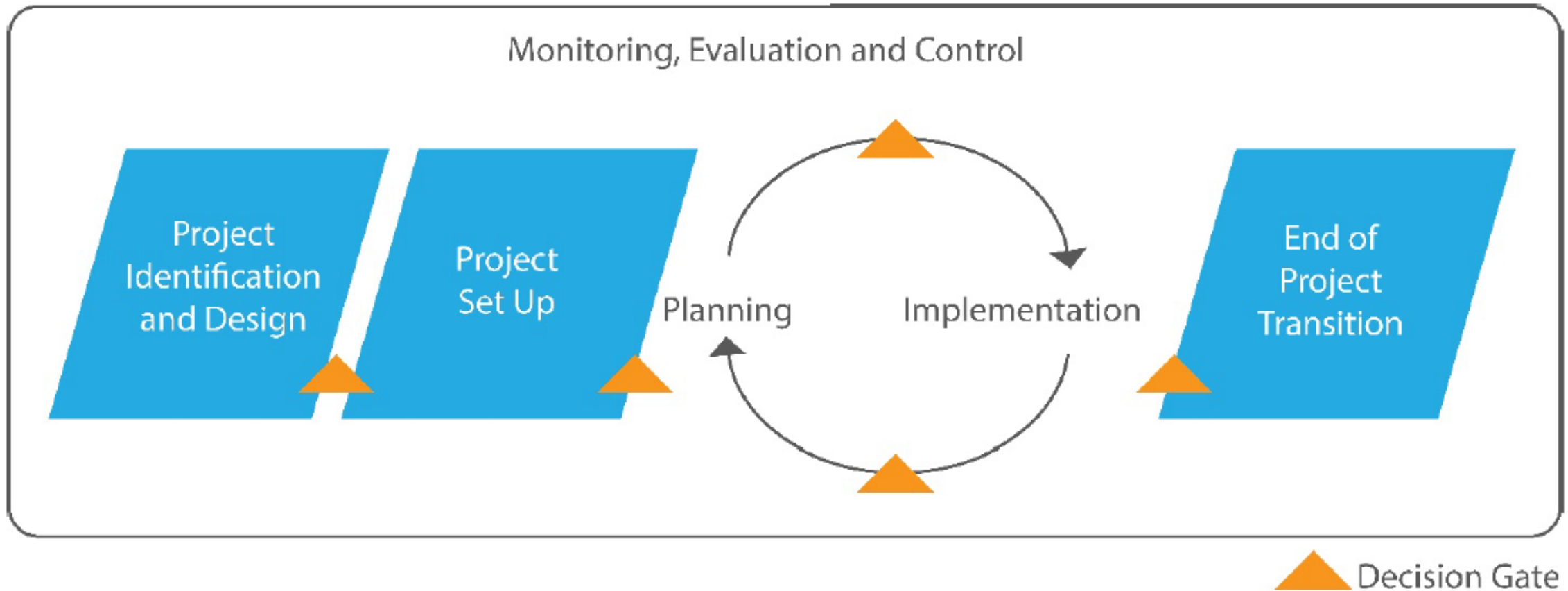
By grouping activities into a project life cycle sequence, the project manager and the core team can:

Define the phases that connect the beginning of a project to its end

Identify the processes that project teams must implement as they move through the phases of the project life cycle

Illustrate how the project management life cycle can be used to model the management of projects

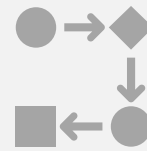
The PMD Pro Project Phase Model



Decision Gates



Initial phases : to decide whether to move forward with potential projects

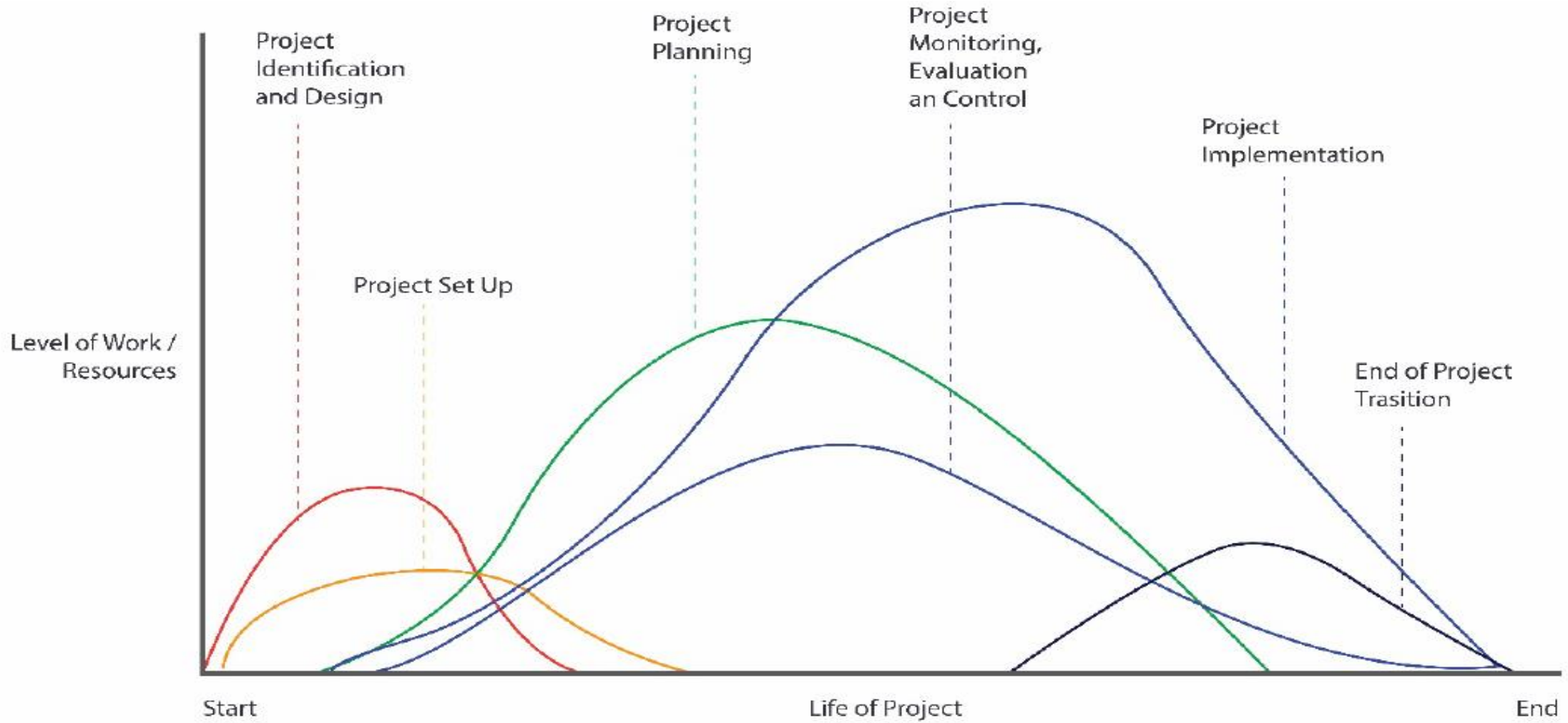


Later phases : Revisit the justification and plan



to ensure that the need the project is intended to address still exists

Project Phase Interactions



PHASE 1: Project Identification and Design

Monitoring, Evaluation and Control

Project
Identification
and Design

Project
Set-up

Plan

Implement

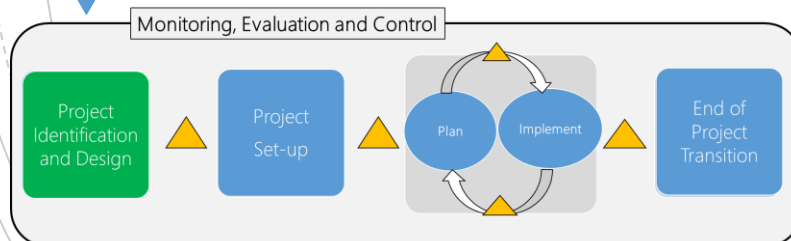
End of
Project
Transition

▲ Decision gates

Project Identification and Design

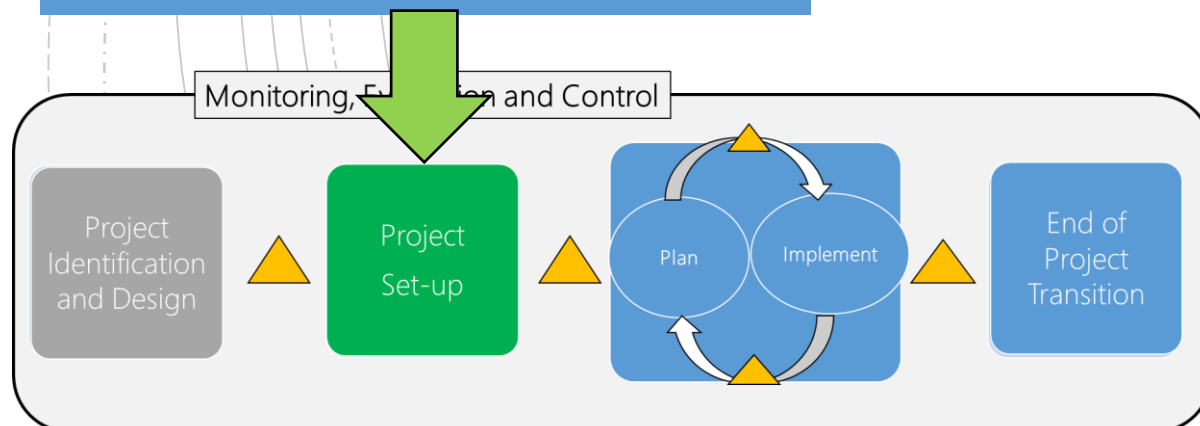
It is during this phase that the project teams

- Define needs,
 - Explore opportunities,
 - Analyze the project environment, and
 - Design alternatives for project design.
- Decisions made during the Project Identification and Design Phase set the strategic and operational framework within which the project will subsequently operate.



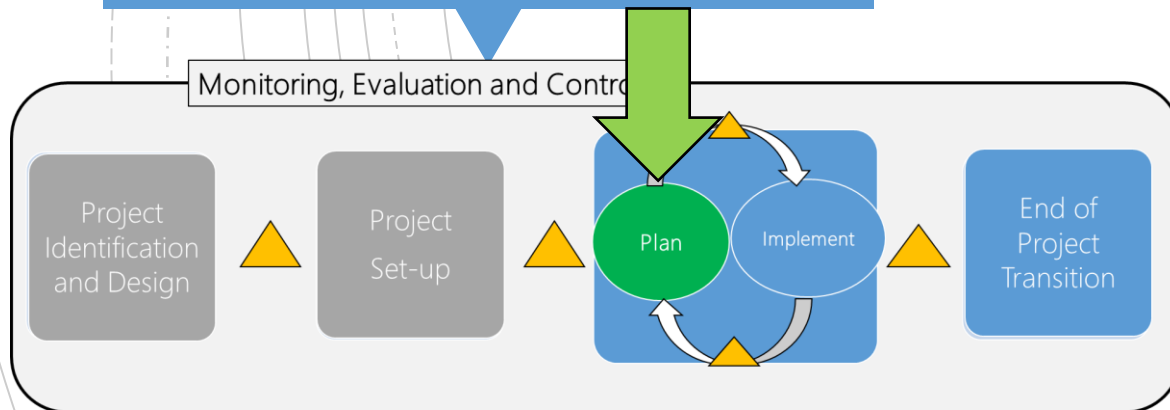
Project Set Up

- It is during this phase
 - the project is officially authorized, and
 - its overall parameters are defined and
 - communicated to the main project stakeholders.
- It is also during this phase that the project team establishes the high-level project governance structure



Project Planning

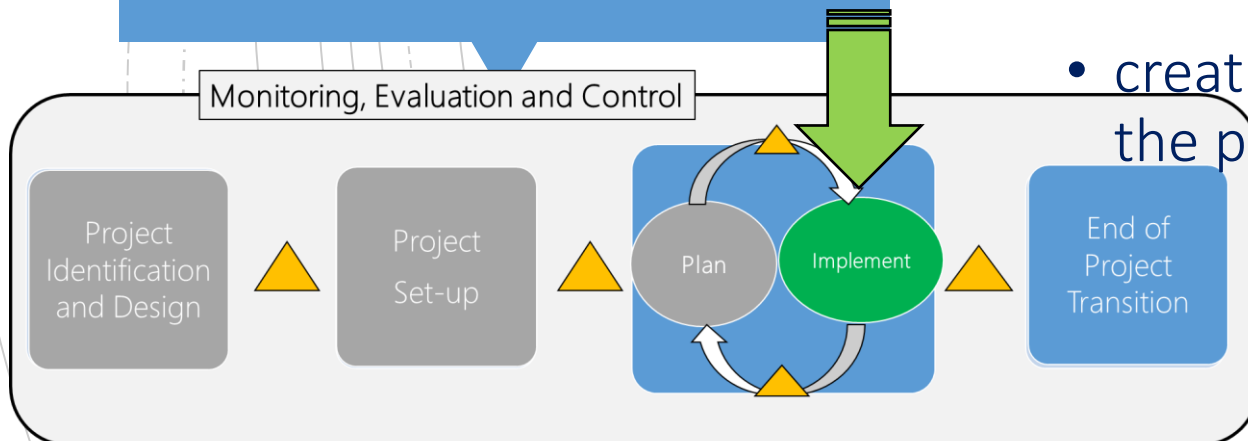
- during the planning phase the team develops a comprehensive and detailed implementation plan that provides a model for all the work of the project.
- This plan is revisited throughout the life of the project and updated (if necessary) to reflect the changing contexts of the project.



Project Implementation

The day-to-day work of project implementation is to lead and manage the application of the project implementation plan:

- Leading the team,
- dealing with issues,
- managing the project team and
- creatively integrating the different elements of the project plan.



Project Monitoring, Evaluation and Control

This phase extends through the entire life of the project and continually measures the project's progress and identifies appropriate corrective actions in situations where the project's performance deviates significantly from the plan.

Monitoring, Evaluation and Control

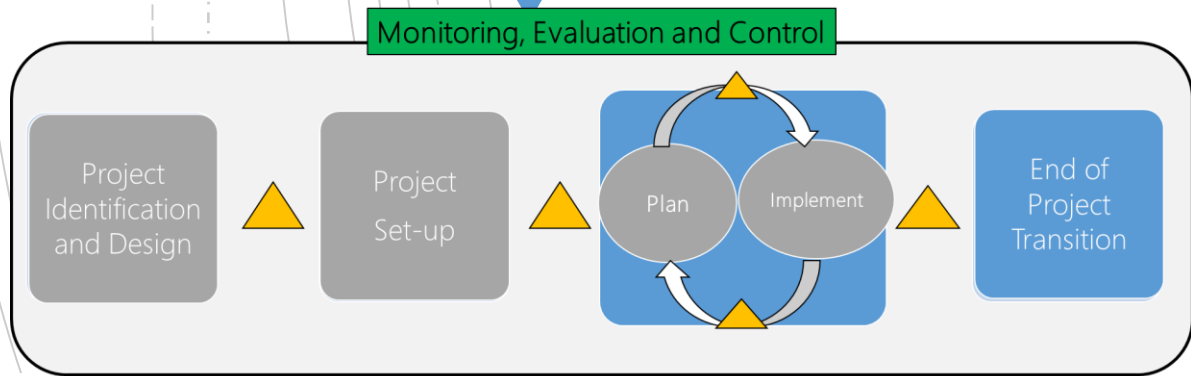
Project Identification and Design

Project Set-up

Plan

Implement

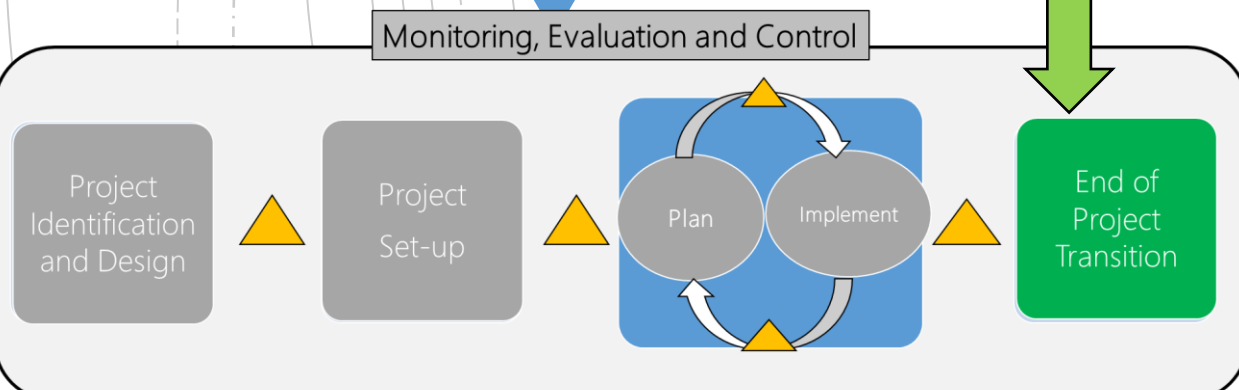
End of Project Transition



End of Project Transition

This phase includes implementing all the transition activities that need to occur at the end of a project, including (but not limited to) :

- confirming the deliverables with beneficiaries,
- collecting lessons learned, and
- completing the administrative, financial and contractual closure activities.



Project Identification and Design phase activities



COLLECT DATA



ANALYSING DATA



IDENTIFY THE
INTERVENTION LOGIC

Data collection tools

Secondary Data	Primary Quantitative Data	Primary Qualitative Data
<ul style="list-style-type: none"> ✓ Literature review ✓ Records review ✓ Existing statistics ✓ Indices ✓ Government documents ✓ Other NGOs' Documents 	<ul style="list-style-type: none"> ✓ Knowledge, practice and coverage surveys ✓ Household surveys ✓ Standardized tests and surveys ✓ Standardized observation instruments ✓ Anthropometric measurements 	<ul style="list-style-type: none"> ✓ Brainstorming ✓ Affinity diagrams ✓ Focus groups ✓ Historical narratives ✓ Timelines ✓ Empowerment circles ✓ Visioning ✓ Locality mapping ✓ Semi-structured interviews ✓ Key informant interviews ✓ Ranking exercises

Analysis

- Current state analysis

It is the process of understanding the status, condition, trends and key issues affecting people and people's livelihoods, ecosystems or institutions in a given geographic context

- Future state analysis

- Future state analysis helps to develop a picture or description of where the project will lead
- This involves asking questions about how the project will improve the livelihoods, ecosystems or institutions of the project participants

Objective	Tool
Organize information	Vulnerability matrices
Prioritize assessment data	Mind mapping Affinity diagrams Ranking exercises and matrices
Identify current state of service provision	Gap assessment analysis Mapping
Promote critical thinking by project stakeholders	Group discussions Focus Groups Workshops
Investigate cause and effect relationships	Force field analysis Problem trees

Logical Framework Matrix

	Project Description	Indicators	Means of Verification	Assumptions
Goal		If the OUTCOMES occur; Then this should contribute to the overall GOAL		
Outcome(s)		If the OUTPUTS are produced; Then the OUTCOMES can occur		
Outputs		If the ACTIVITIES are conducted; Then OUTPUTS can be produced		
Activities		If adequate RESOURCES / INPUTS are provided; Then the ACTIVITIES can be conducted		

Indicators Guidelines

Elements	Indicator Guidelines
Goal – The ultimate objective or highest end result or impact to which the project contributes	Indicators are longer-term impacts that are not specific to a single project. Rather, they are program, sub-sector, or sector objectives to which several other projects and variables will also contribute. Examples: transformation, sustainability, livelihood, and well-being.
Outcomes – What the project expects to accomplish at the beneficiary level that aggregate and help bring about accomplishment of goals and impact over time	Indicators at this level are crucial but can be more difficult to determine. Change is sought among extended beneficiaries, target populations, collaborating institutions and local partners. Examples: use of knowledge and skills in actual practice over time; transportation of goods on constructed roads over time, reduced malnutrition, improved incomes, and improved yields.
Outputs – The tangible deliverables resulting from project activities and which are largely under project managements control – that aggregate and contribute to outcomes	Indicators at this level are easier to specify than at the outcome level because they represent tangible goods and services to be delivered by the project. All outputs have to be accomplished by the end of the project's implementation period and according to the time schedule included in the project plan. Examples: people trained with increased knowledge and skill; quality roads built, goods delivered and services performed.

SMART Indicators

- **Specific** – Indicators must be quantifiable and measurable? What does the project intend to change? Do the indicators provide detailed parameters regarding:
 - **Quantity** – the expected numerical representations of what is to be achieved;
 - **Quality** – the narrative or pictorial description of the expected achievements;
 - **Location** – the geographic boundary of the expected achievements.
- **Measurable** – The indicator must be quantifiable and measurable. Can the indicator be assessed objectively and independently?
- **Achievable** – Indicators must be attainable within the constraints of the project triangle (budget/resources, time/budget, and scope/quality).
- **Relevant** – Indicators must accurately measure the change the project aspires to generate. Does the indicator practical and cost-effectively measure what the project team needs to know?
- **Time-bound** – The indicator should identify a specific time and date. By when will the indicator be achieved? Can the indicator be achieved within the established timeframe?

Phase 2 : Project Set-up

The objectives of the Project Set Up Phase include:

- Establishing the Project Governance Structure. Governance defines the management framework within which project decisions are made. This involves
 - **Authority:** Who has the power to make decisions and within what tolerance levels;
 - **Accountability:** Who is accountable for the success of the project? With no clear accountability for project success, there is no one moving agendas to resolve project issues.
- Officially authorizing the start of the project – Project Charter
- Communicating the project launch

Project Charter – Key elements

- **Project Purpose** – including a statement of the need the project will address.
- **Project Deliverables** – articulating the scope of the project, including the project goal, outcomes, and major outputs.
- **High-level Project Estimates** – including a high-level statement of:
 - The project activities;
 - The project schedule;
 - The project budget; and
 - A preliminary list of the roles and skills required to perform the necessary work.
- **Project Risks** – identifying potential problems/risks that the project might encounter.
- **Project Tolerances** – articulating project tolerances regarding project deliverables, schedule, cost and risk.
- **Project Change Control** – establishing an exception handling process for when the project exceeds a tolerance in any of these areas.



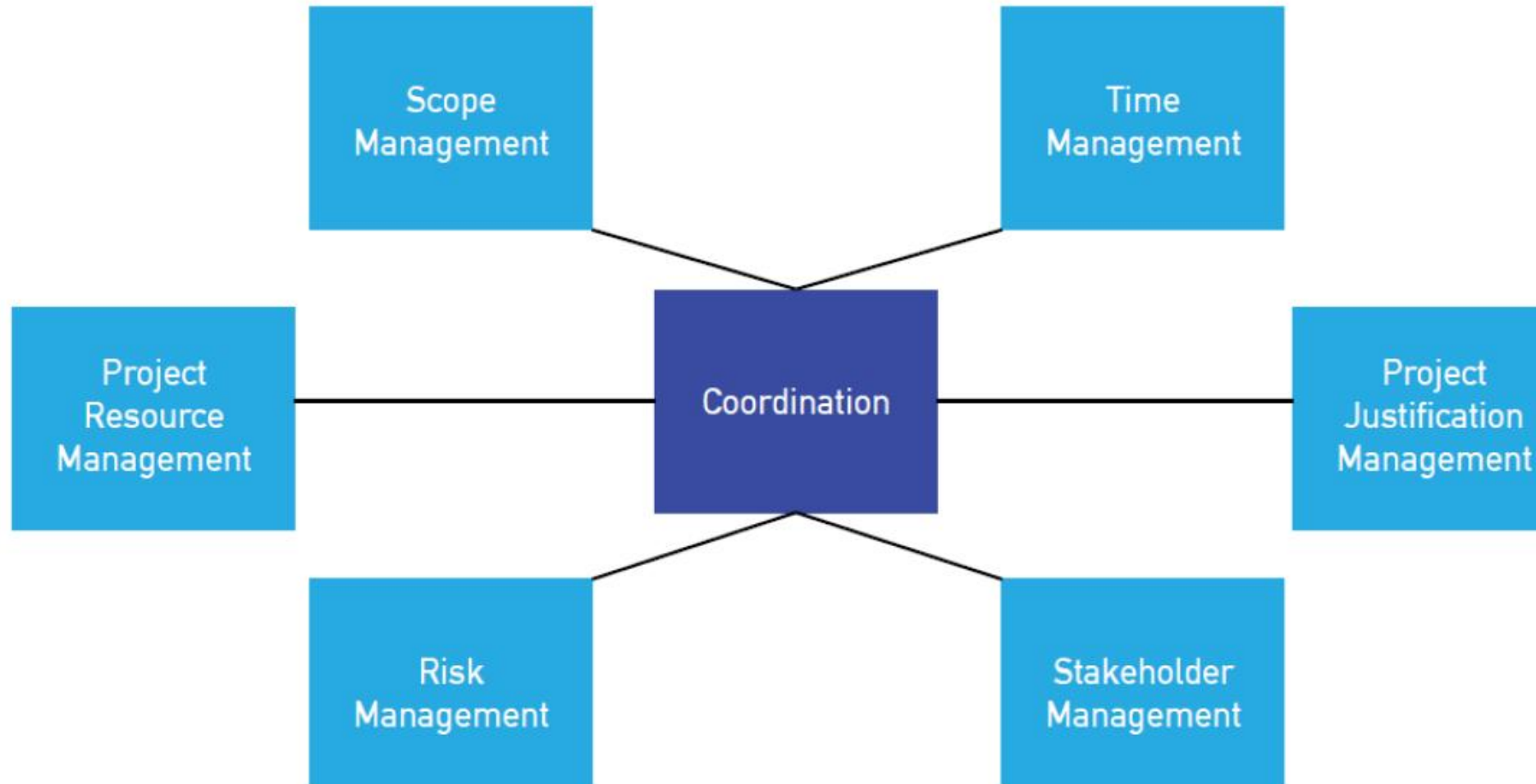
Project Proposal Vs Implementation Plan

	Project Proposal	Project Implementation Plan
Purpose	To obtain approval and funding for the project, emphasizing clear, concise communication of ideas that 'sell' the project to funding stakeholders	To ensure that the project arrives on time, on scope and on budget, and according to established quality parameters; to emphasize comprehensive, logical planning and to model the project for review by the project team and other stakeholders
Format	Format is often determined by donor requirements or agency stakeholders responsible for investment decisions	Format is determined by the project team and key stakeholders
Level of Detail	Often limited in level of detail – due to the purpose, format, anticipation, schedule and timing of proposal	Level of detail is developed by the project team and key stakeholders
Participation	Often written by a small team as a result of time constraints that limit participation	Opportunity exists to expand participation to include an array of stakeholders, including experts and technical advisors
Audience	Focused on donors and stakeholders who distribute resources	Focused on the needs of the team implementing project activities
Timing and Schedule	Often written under tight time constraints, sometimes months (or even years) prior to implementation	The opportunity exists to revisit proposals to further develop/revise/update plans at the beginning of project implementation or at key benchmarks in the life cycle

Implementation Planning is Balanced

- We should plan each phase of the project
 - Planning for Project Set Up
 - Planning for Project Planning
 - Planning for Project Implementation
 - Planning for Project Monitoring and Evaluation
 - Planning for Project Transition Planning

Implementation Planning is Comprehensive



Other aspects of implementation planning

- Implementation Planning is Integrated
- Implementation Planning is Participatory
- Implementation Planning Is Iterative

PHASE 4: Project Implementation

- Managing Issues
- Managing People
- Managing Internal Controls

Managing Issues

- Issue Identification and Tracking
- Issue Analysis
- Issue Communication
- Issue Control
- Issue log

Issue Reference	Reported by	Description	Date Reported	Assigned to	Date Assigned	Status	Status Date	Resolution

Managing People

- Acquiring Project Staff
- Creating Staff Job Descriptions
- Documenting Project Organization Charts
- Developing Project Staff
- Conducting Performance Assessments
- Establishing Team Communication Norms

Managing Internal Controls – Why?

- Promoting the effectiveness and efficiency of operations;
- Increasing the reliability of project outcomes;
- Promoting compliance with applicable laws and regulations;
- Protecting organization resources, both physical (e.g., machinery and property) and intangible (e.g., reputation, intellectual property);
- Reducing risk of fraud and corruption.

PHASE 5: Project Monitoring, Evaluation and Control

Hierarchy	Indicators	Definition of Key Terms	Information Needed	Sources of Data	Methods of Data Collection	Who Collects	Frequency of Collection	Users
Goal								
Outcomes								
Outputs								
Activities								
Inputs*								

Progress Monitoring - What, Why, When and How

What	A continuous review of project progress at the activity and outputs levels Identify necessary corrective action
Why	Analyze current situation Identify issues and find solutions Discover trends and patterns Keep project activities on schedule Measure progress against outputs Make decisions about human, financial and material resources
When	Continuous
How	Field Visits Records Reports

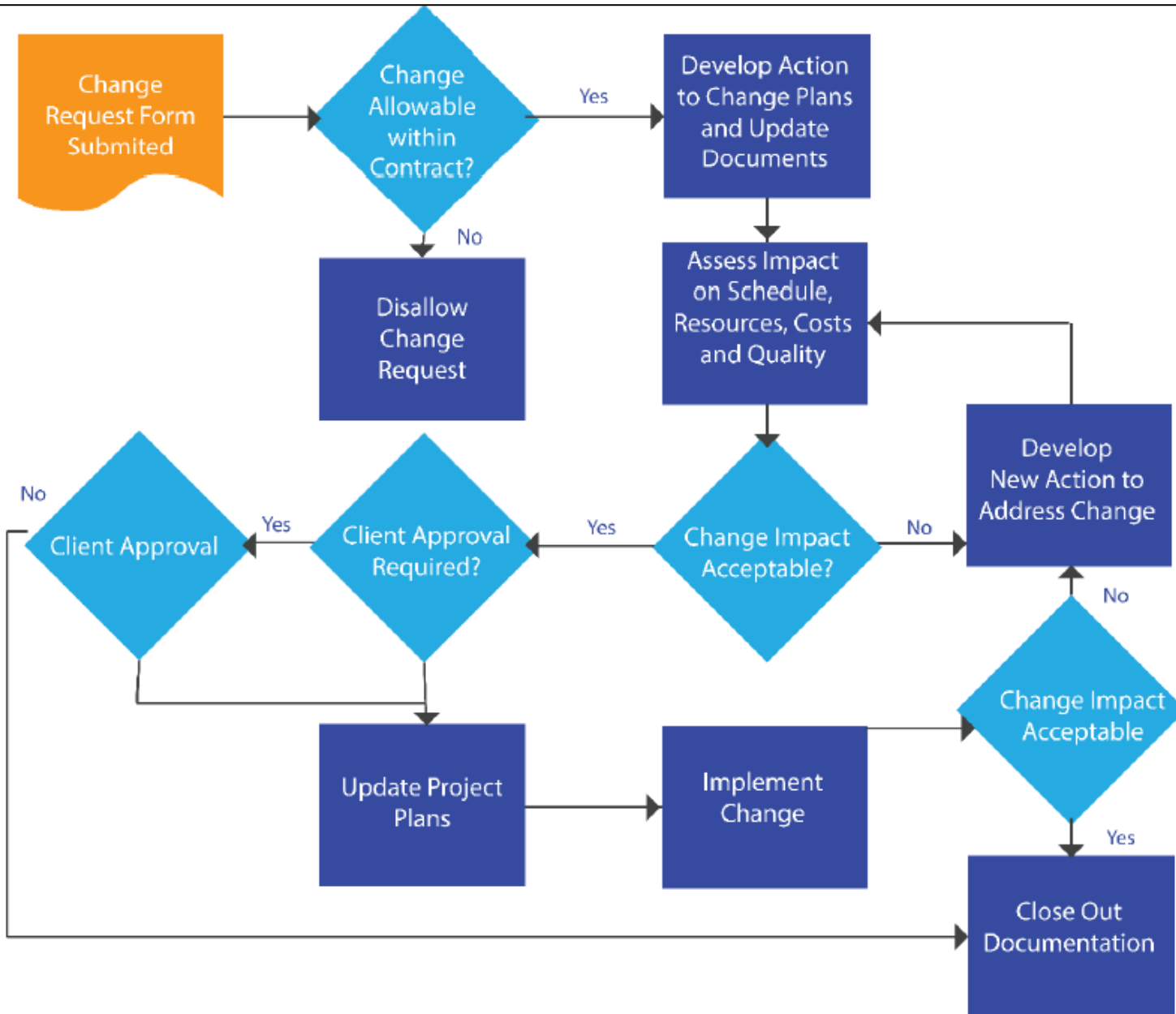
Project Evaluation Approaches

- Final evaluations
- Mid-term evaluations
- Ex-post evaluations

Project Control

- integrated change control
 - **Changes are managed** through a formal change management process;
 - **Changes are analyzed** to ensure that implications of those changes are thoroughly thought through;
 - **Changes are documented** to illustrate their complete impact on all the integrated elements of the project
 - **Changes are communicated** to key project stakeholders.
- Tolerances and Issue Escalation
 - Scope, Schedule, Cost , Quality, Benefits, Risk

Change Management Cycle



PHASE 6: End of Project Transition

The four scenarios of an end of project transition

Termination*	Extension	Expansion	Redesign
The project is formally ended and all project closure activities completed	Negotiation of added time to finish the project (could be at additional or 'no' cost)	Identifications of elements for replication with a new target area or population	Continuation via a new phase with modified interventions or activities

*Termination could also include 'phasing over' or transferring the project activities to a local partner, institution or community.

Manage the End of Project Transition Strategy

Transition Planning Matrix

Component	Key Questions	Guiding Principles	Challenges
1. Plan for transition from earliest project phases	What type of transition is envisioned? What is the timeline and what are benchmarks?	Ongoing project review and revision Transparency; especially funding	Balancing firm commitments with flexibility Allowing adequate time to develop capacity
2. Develop partnerships and local linkages	Selecting the right partners? What do partners bring?	Diversity: may need other project inputs Clear and common goals	Aligning needs and objectives of diverse stakeholders Supporting local partners
3. Build local organizational and human capacity	What capacities are needed? What capacities exist?	Build on existing capacity if possible Create environments to support capacities	Designing monitoring to track capacity building Providing incentives and retaining experienced staff
4. Mobilize local and external resources	What inputs are needed to maintain services? Can benefits be sustained without ongoing inputs?	Procure resources locally where possible Increasingly bring external resources under local control	Difficulty finding adequate or available local resources Other funders not 'buying-in' to original objectives

Manage the End of Project Transition Strategy

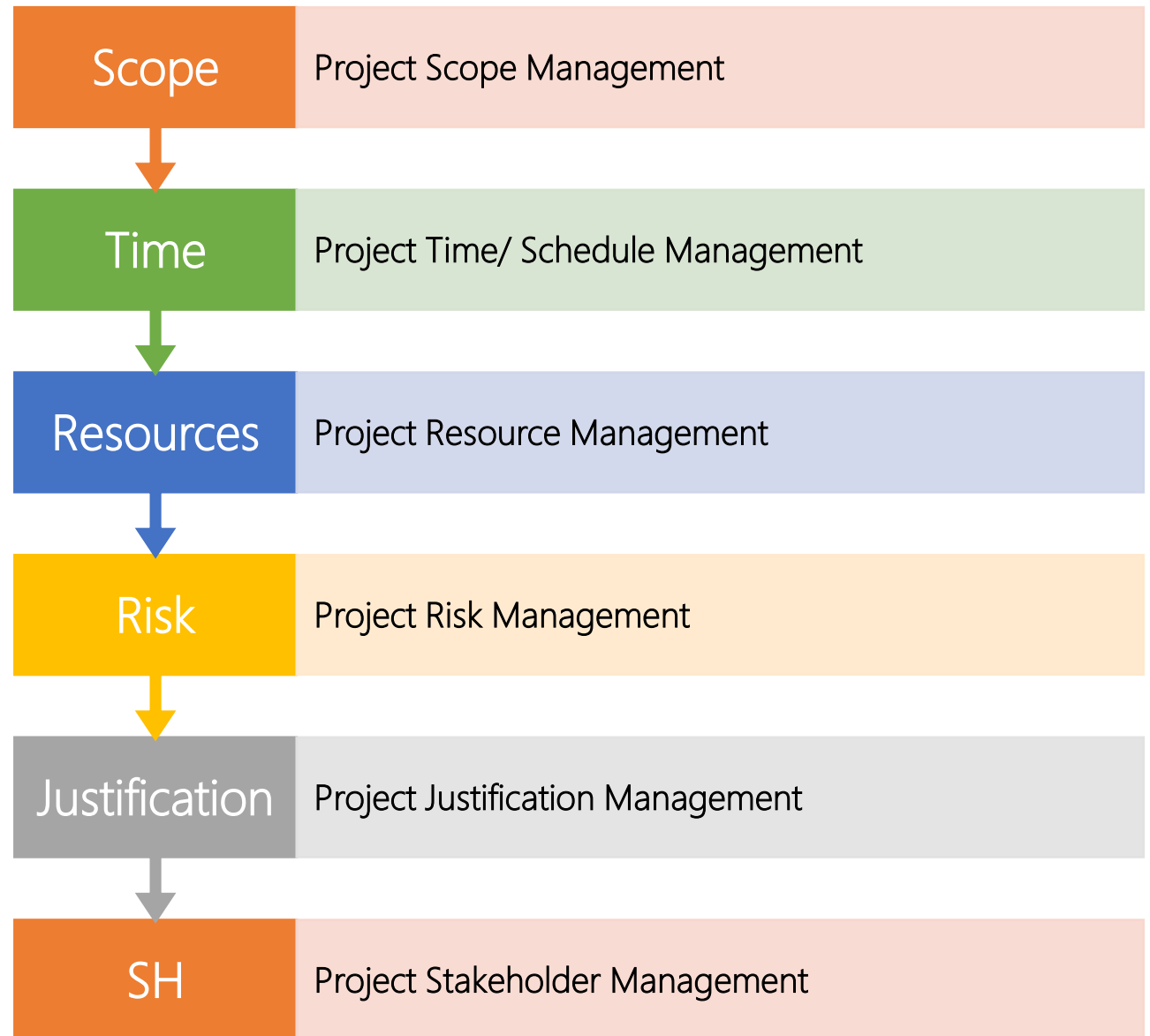
Transition Planning Matrix

Component	Key Questions	Guiding Principles	Challenges
5. Stagger phase out of various activities	<p>What are key project elements?</p> <p>Which elements are dependent on others?</p>	Flexibility; staggering sequence may change upon implementation	Sufficient time allowed in the project cycle to start seeing the intended impact and outcomes
6. Allow roles and relationships to evolve after transition	<p>What types of ongoing support (advice, mentoring, Technical Assistance, etc.)?</p> <p>How will ongoing support be funded?</p>	Prevent slippage of project's intended results by including in extended, expanded or redesigned project	<p>Availability of funding for ongoing support</p> <p>Availability of staff who can focus sufficient time and energy on ongoing support</p>

Closure activities

- Verify the Project Scope and the Accept Deliverables
- Complete Administrative, Financial and Contractual Closure
- Complete End of Project Learning
- Celebrate Accomplishments

Section 3: Project Management Disciplines



Discipline 1: Scope Management

Product scope Leads to Project Scope. We need to ensure that the project includes **all work required** and the **only work required** to complete the project successfully

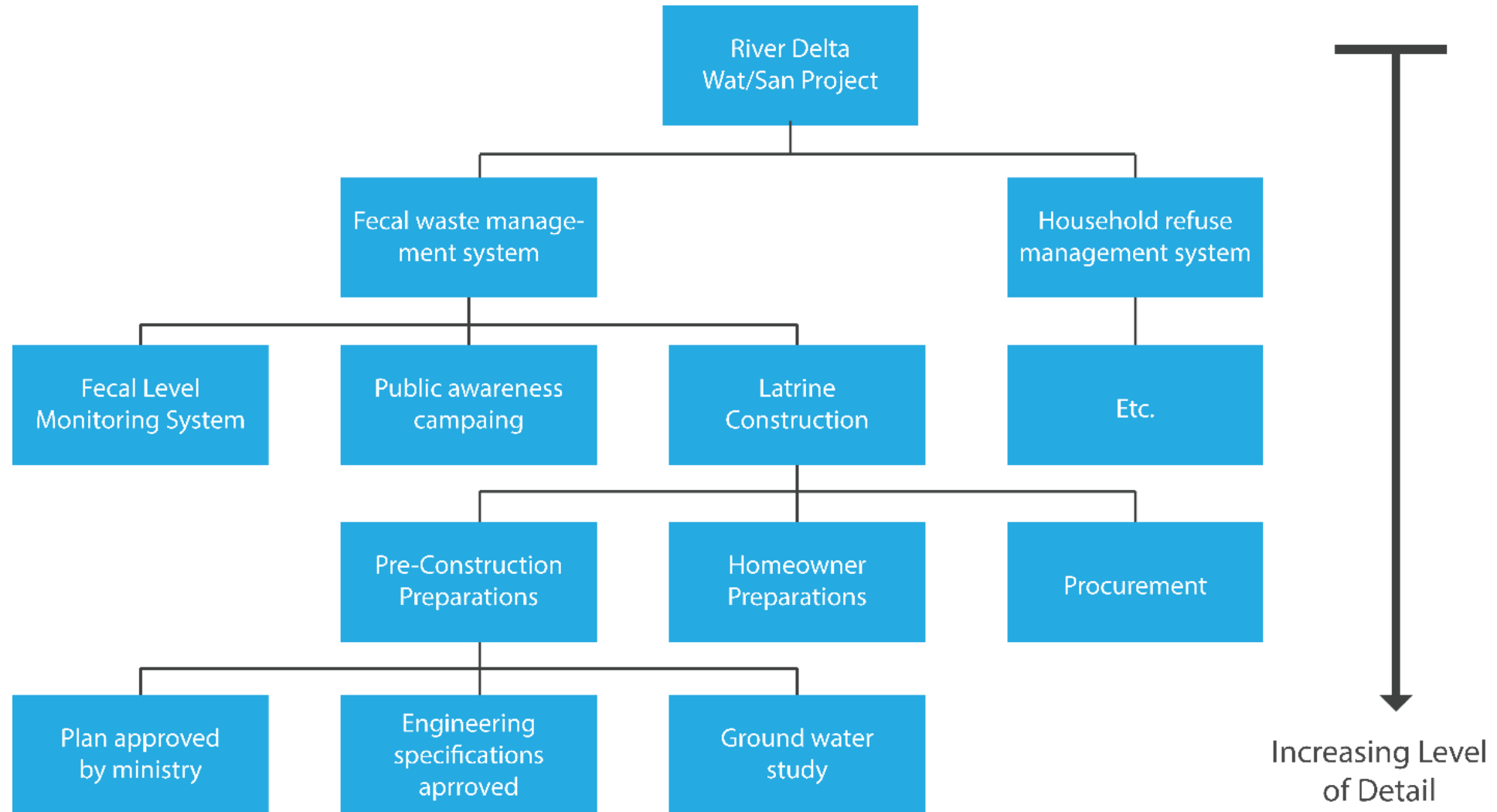
Product scope:

- Includes the features and functions that **characterize a product or service**
- Completion of product scope is measured against the requirements

Project scope:

- The **work that must be done** in-order to deliver a product with specified functions and features
- Completion of a project is measured against the plan

Work Break Down Structure (WBS)



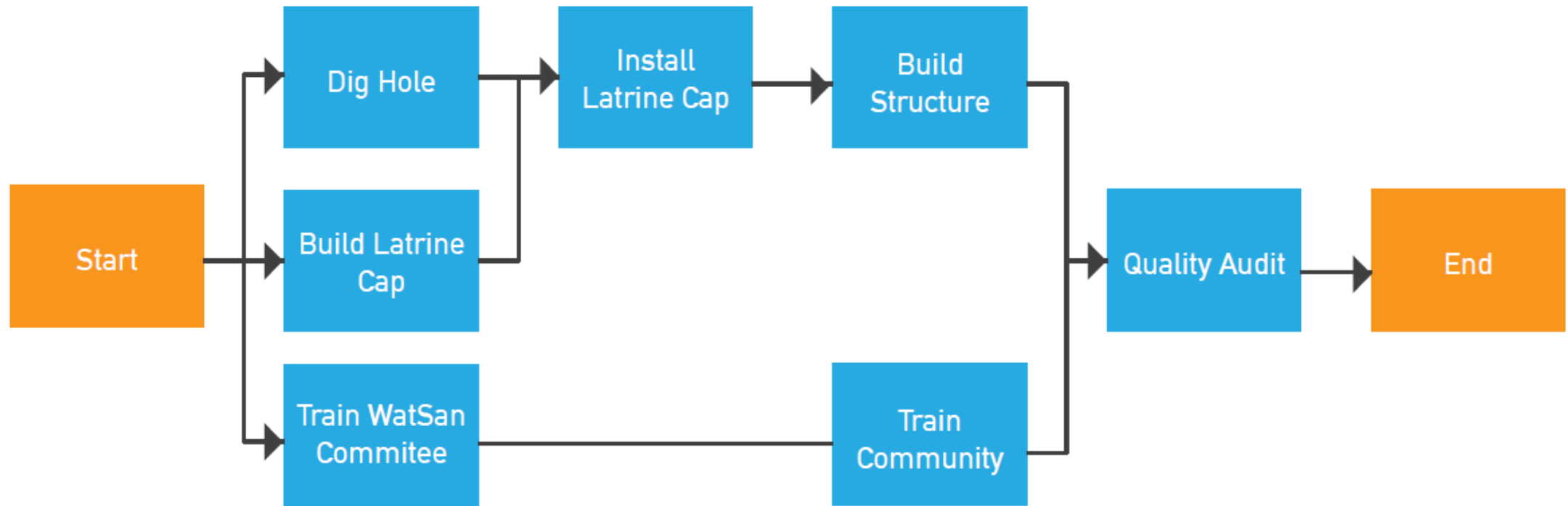
Why WBS?

- Guide the process of activity identification and sequencing;
- Provide a basis for:
 - accurate estimates of project duration;
 - accurate estimates of project cost;
 - accurate resource estimates (vehicles, people, supplies, building materials);
- Identify required departmental, subcontracting, supplier services;
- Communicate and agree the product and project scope with the project's stakeholders;
- Show the hierarchy of work needed to complete a project and indicate the interfaces between them;
- Delegate the work packages to project team members, implementing partners or suppliers

Discipline 2: Time Management

- **Activity Definition** –Comprehensively identifying the activities that need to be performed to produce the project deliverables.
- **Activity Sequencing** – Identifying the relationships that exist among the various schedule activities.
- **Activity Resource Estimating** – Allocating the type and quantity of resources available/required to perform each schedule activity.
- **Activity Duration Estimating** – Estimating the time required to complete project activities.
- **Schedule Development** – Creating a project schedule based on activities, sequences, durations, resources and schedule constraints.

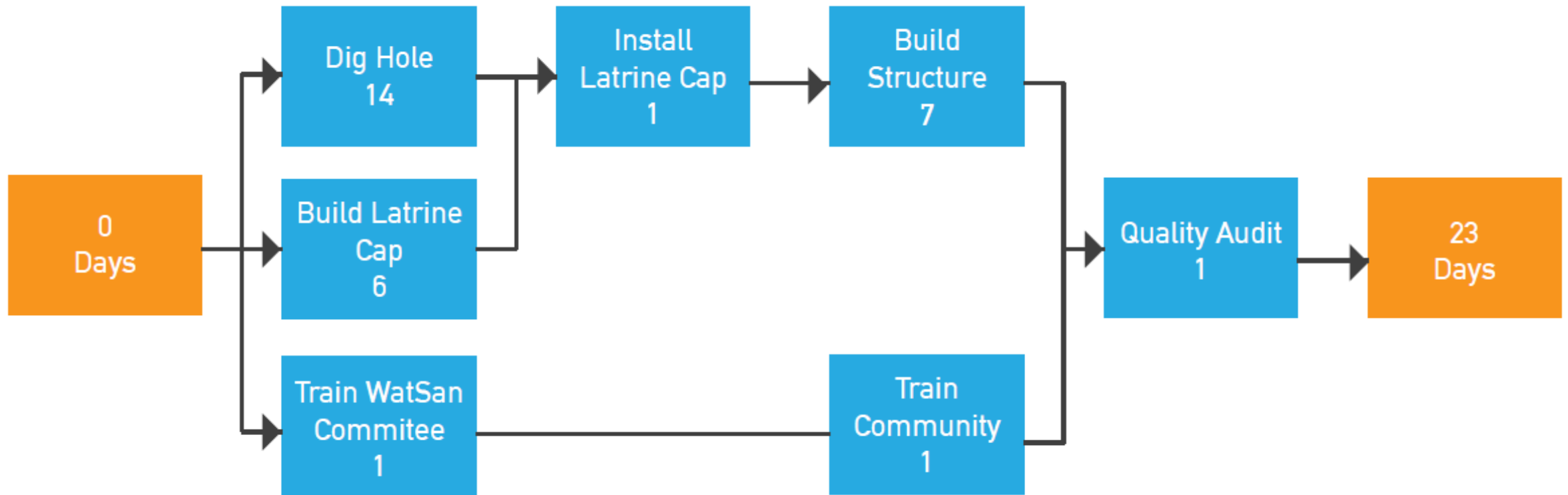
Activity Sequencing



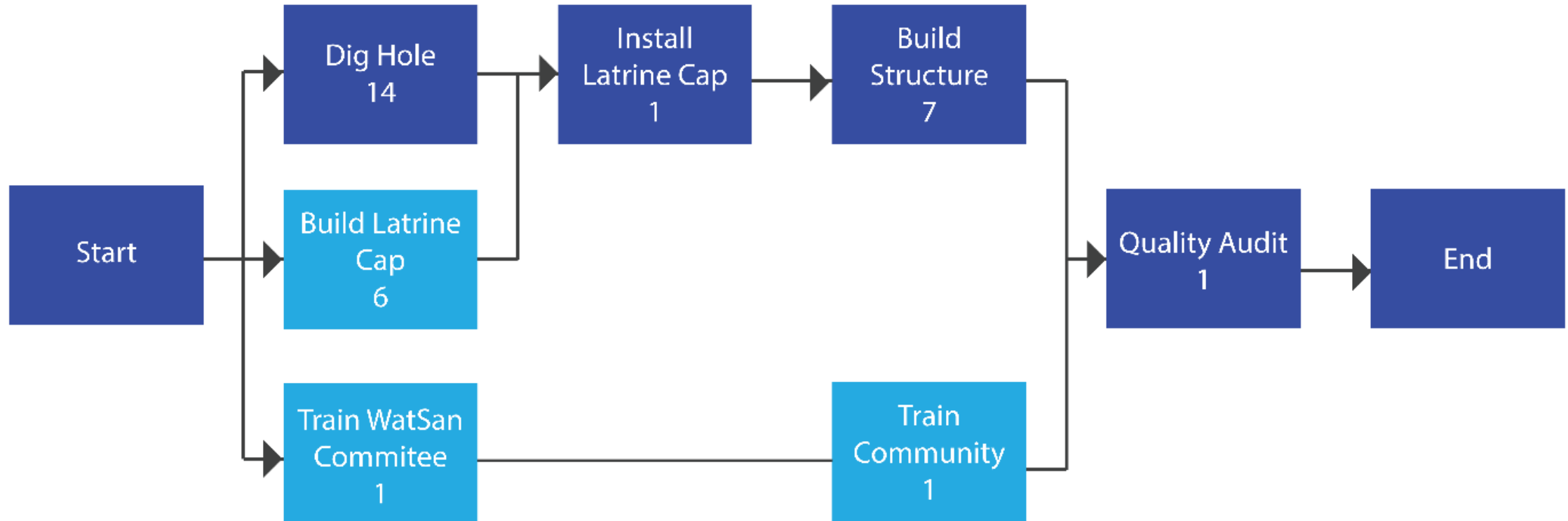
Activity Resource Estimating

- Decisions relating to the number and quality of resources committed to an activity, in turn, are contingent on several factors, including (but not limited to) the following:
 - Time
 - Budget
 - Regulations and Org policies
 - Other Factors that influence resource availability (Weather, Material, Logistics, HR)

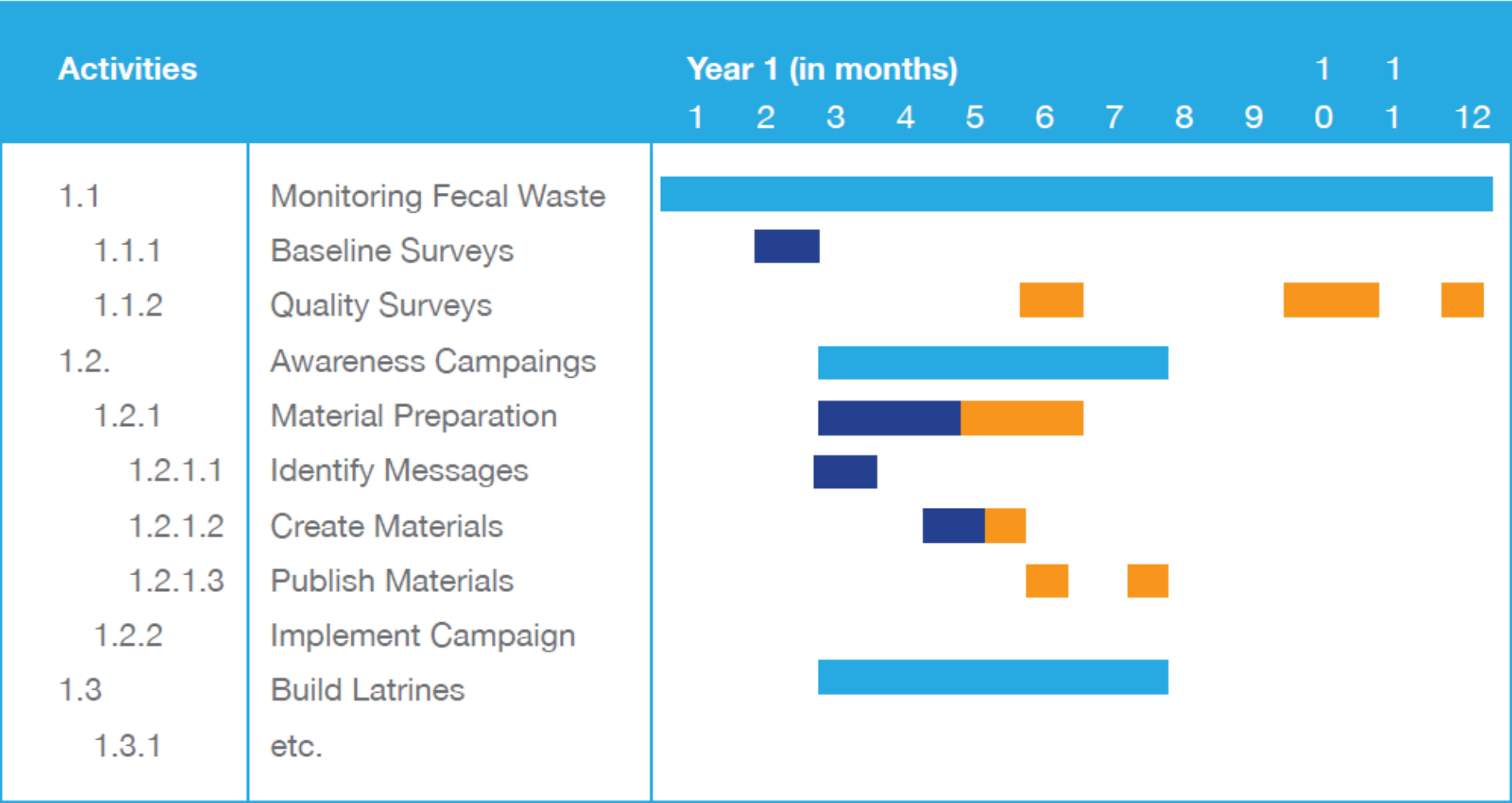
Activity Duration Estimating



Critical Path Method



Schedule Development



Managing the Project Schedule

- *Fast tracking*
- Crashing

Discipline 3: Project Resource Management

- Why is Effective Resource Management Important?
- Managing Project Finances
 - Developing Budgets
 - Identifying Cost Estimates
 - Monitoring Budgets and Expenditures

Critical areas of focus in financing

- Accessing historical data for financial reports
- Explaining budget variances
- Issuing checks
- Authorizing expenditures
- Managing cash balances
- Implementing purchasing policies

Developing Budgets

- Comprehensive Budgets
- Detailed Budgets : Transaction Costs, Shared Services
- Chart of Accounts
- Timing
 - Life-of-project budget (or multi-year budget)
 - Annual project budgets

Activity Based Budgeting

- Develop a complete list of activities during scope planning.
- Work out what will be needed to achieve each activity and estimate how much each will cost.

Activities	Costs per quarter				Total	Activity Total
	Q1	Q2	Q3	Q4		
1.1 Establish Planning Unity						
EQUIPMENT						
1. Computers	2,000	2,000			4,000	
2. Fax Modems	500				500	
3. Office Furniture	3,000				3,000	
RECRUITMENT						
1. Counterparts	800	800	800	800	3,200	
2. Office Staff	200	300	300	300	1,100	
						11,800
1.2 Establish link with Government						
LIAISON MEETINGS						
1. Prepare written presentation materials		5,000			5,000	
2. Prepare video	1,000	1,000	4,000		6,000	
2. Stationery			200	200	400	
3. Refreshments			100	100	200	
						11,600

Identifying Cost Estimates

- Choose the right approach to make the estimate
 - Top-Down Estimates
 - Bottom-Up Estimates
 - Parametric Estimates
- Develop phase estimates (when possible)

Monitoring Project Financial Performance

Earned Value

Conventional (cash flow)

Task	Planned Cost	Month One	Month Two	Month Three	Month Four	Month Five	Month Six
A	100	100					
B	200		200				
C	100		100				
D	400			400			
E	100			100			
F	200			200			
G	200				200		
H	100				100		
I	300					300	
J	100						100
Planned total cost per month		100	300	700	300	300	100
Planned cumulative cost		100	400	1,100	1,400	1,700	1,800
Actual total cost per month		150	350	800			
Actual cumulative cost		150	500	1,300			

Task	Planned Cost	Actual Cost	% Done	Month One	Month Two	Month Three	Month Four	Month Five	Month Six
A	100	150	100%	150/100					
B	200	200	100%		200/200				
C	100	100	100%		100/100				
D	400	400	100%			400/400			
E	100		0%			0/100			
F	200	100	50%			100/200			
G	200	200	100%			200/0	200		
H	100	50	50%		50/0		100		
I	300	100	50%			100/0		300	
J	100		0%						100
Planned total cost per month				100	300	700	300	300	100
Planned cumulative cost				100	400	1,100	1,400	1,700	1,800
Actual total cost per month				150	350	800			
Actual cumulative cost				150	500	1,300			

Results Combinations for Earned Value Analysis

	Behind Schedule	On Schedule	Ahead of Schedule
Under Budget	Need more data	Good	Good
On Budget	Bad	Good	Good
Over Budget	Bad	Bad	Need more data

Managing the Supply Chain



PROCUREMENT
MANAGEMENT



LOGISTICS
MANAGEMENT



ASSET MANAGEMENT

Procurement Management

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

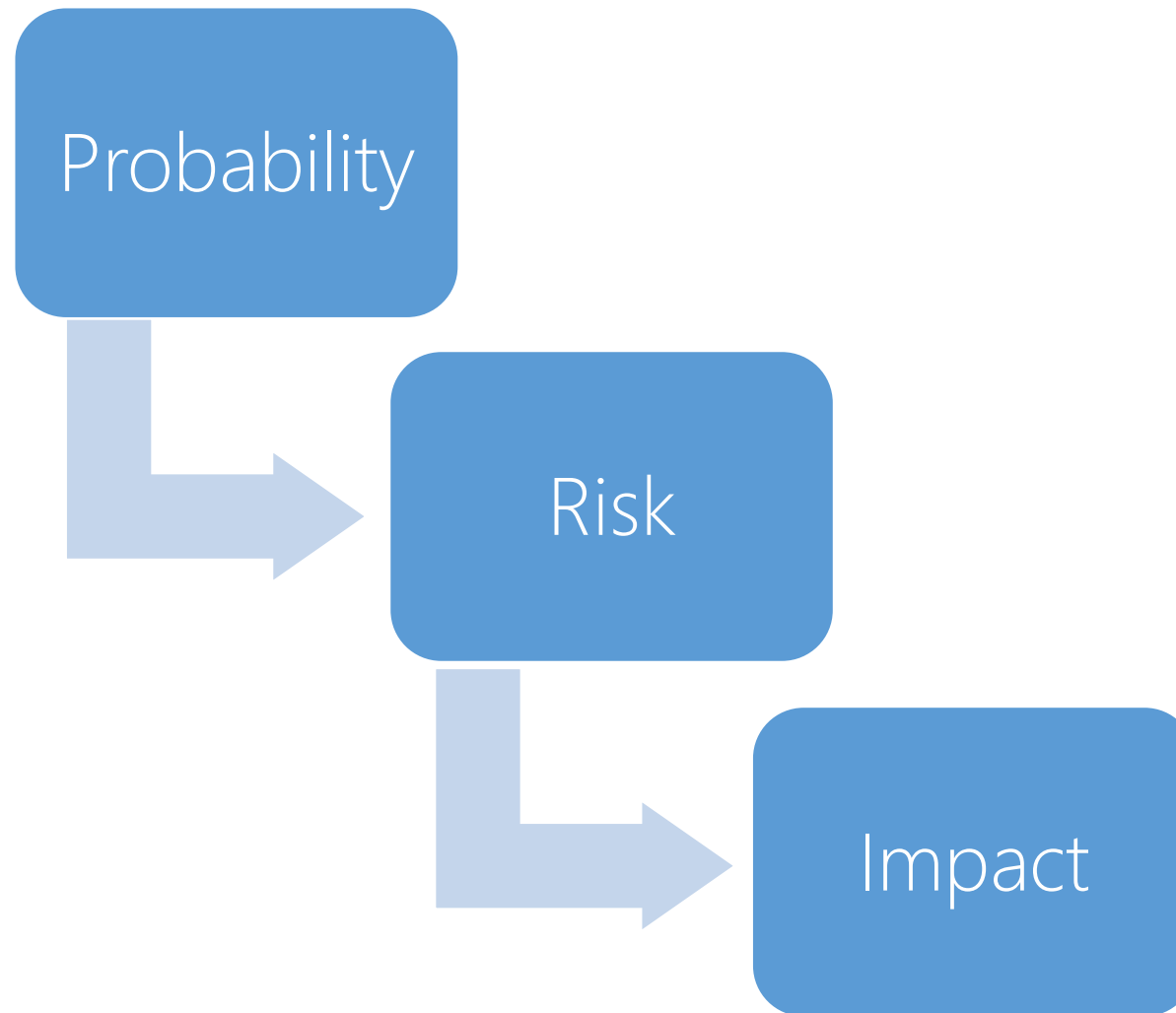
Asset Management

- Definition of Assets (Value, Life)
- Recording Assets
- Labeling Assets
- Monitoring and Asset Records
- Safeguarding Assets
- Disposing of Assets

Human Resources Management

- Acquiring Project Staff
- Identifying Project Staff Assignments
- Documenting Project Organization Charts
- Developing Project Staff
- Conducting Performance Assessments
- Promoting a Highly Productive Team Environment

Project Risk Management



Project Risk Management

- **Risk identification** - identifying and documenting all the risks that can affect the project.
- **Risk assessment** - determining the probability that risks will occur and estimating their potential impact, and prioritizing risks.
- **Risk response planning** - deciding what actions are needed to reduce or remove threats, particularly those with high-probability and high-impact.
- **Risk monitoring and control** - responding to risks as they occur and ensuring proper risk management procedures are being followed.

Risk Identification

• Step 1 : Risk Categorization

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.

Legal and regulatory

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

Organizational/management/human factors

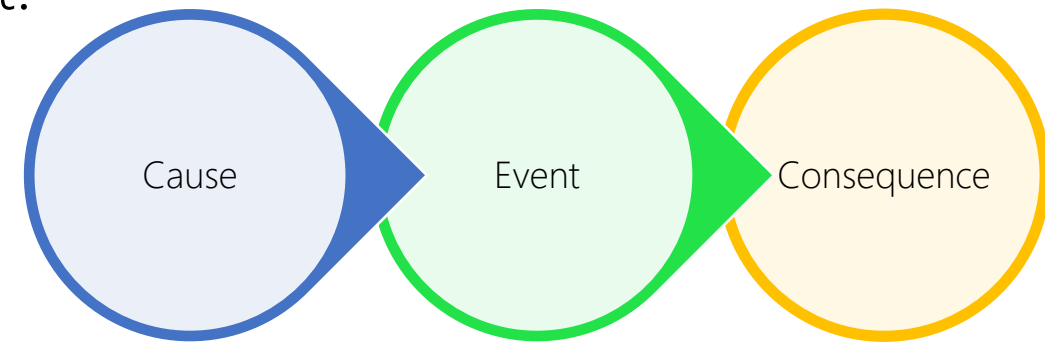
- Poor leadership
- Inadequate authority of key personnel to fulfill roles
- Poor staff selection procedures
- Lack of clarity over roles and responsibilities
- Personality clashes
- Lack of operational support

Risk Identification

- Step 2 : Identify Specific Risks from the Categories

When identifying risks, care should be taken to write the risk in such a way that three factors are apparent to a future reader. These are:

- The cause, or the origin of the risk;
- The risk event or situation itself;
- The impact of the risk on the project.



Risk Assessment

- **Prioritizing Risks:** Using criteria agreed upon by the project team and key stakeholders, risks are ranked according to their probability and impact.
- **Identifying Risk Tolerances:** Next, the project team needs to work with key stakeholders to identify their risk tolerance levels to identify which risks are acceptable, and which fall outside of acceptable tolerance levels and need to be actively managed.

PROBABILITY risk will occur	High			Risk B
	Medium	Risk C		
	Low			Risk A
		Low	Medium	High
		Potential IMPACT on the Project		

Risk Response

- **Risk Avoidance** – Do not do (or do in a different way) some portion of the scope that carries high-impact and/or a high probability of risk. *For example, a project might choose not to work in a geographic area because there is too much insecurity.*
- **Risk Transference** – Shift (or share) the risk for some aspect of the project to (or with) another party. The most common example of risk transference is insurance. *For example, insurance policies transfer the risk of vehicle damage and loss to the insurance company.*
- **Risk Reduction/Mitigation** – Act to reduce the probability and/or impact of a potential risk. *Take, for example, a project that is concerned about the risk of commodity theft.*
- **Risk Acceptance** – If the perceived probability and impact risk is assessed as reasonable, an organization can choose not to act on.

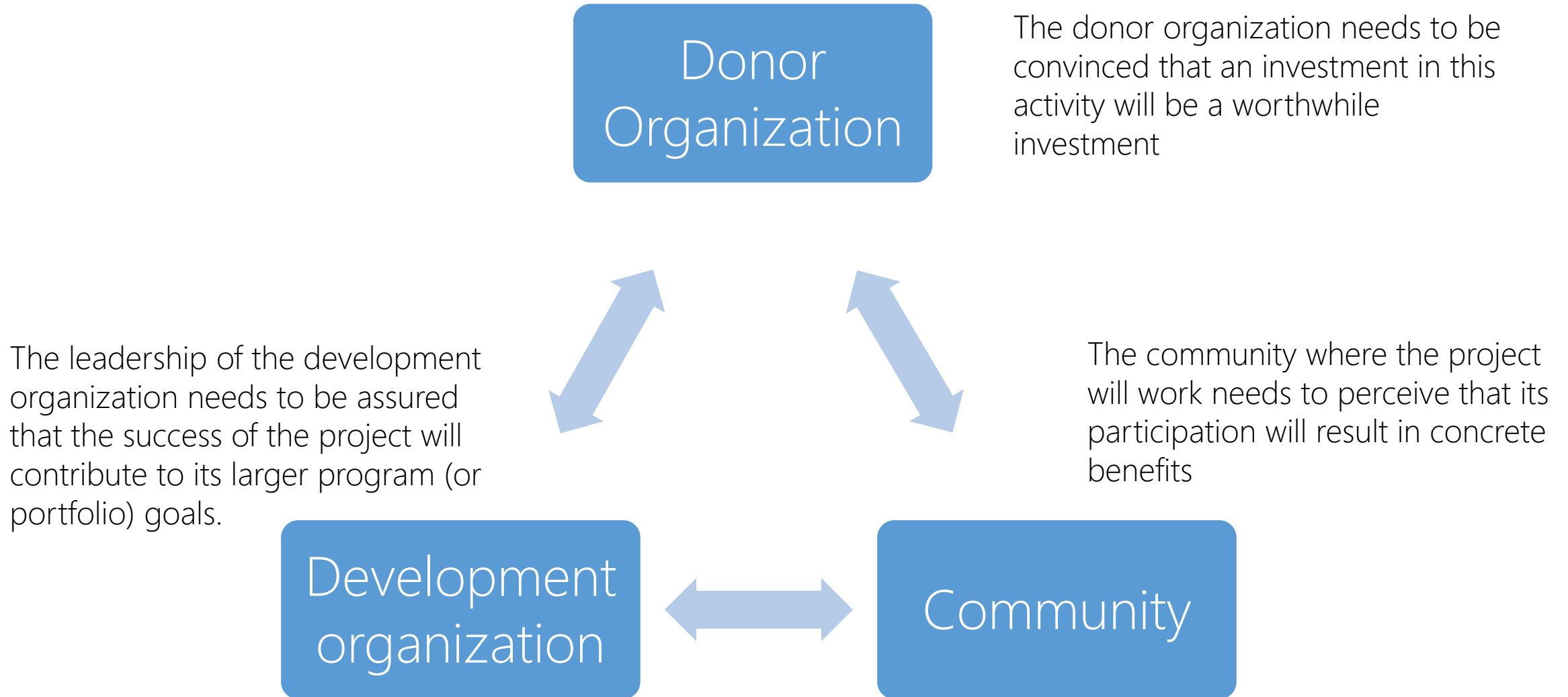
Risk Register

Risk Category	Risk Name	Status	Probability	Impact	Risk Score	Response	Responsible	When
Strategy	Partner lacks capacity	Active – risk is being actively monitored	3/5	4/5	7	Mitigate – budget moneys for training in accounting	Marian	Q1
Nature	Rain delays activities	Retired – risk resolved	2/5	3/5	5	Avoid – delay activities until dry season	PM	Q1
Political	Insecurity threatens deliveries	Retired – risk has been resolved	2/5	5/5	7	Transfer – contract transporters to absorb risk of loss	MV	Q2
Etc.								

Risk Monitoring and Control

- The final step in the risk management process is to continually monitor risks to identify any change in their status, or if they turn into an issue.
- It is best to hold regular risk reviews to identify actions outstanding, risk probability and impact, remove risks that have passed, and identify **new** risks.

Project Justification – Why it is critical?



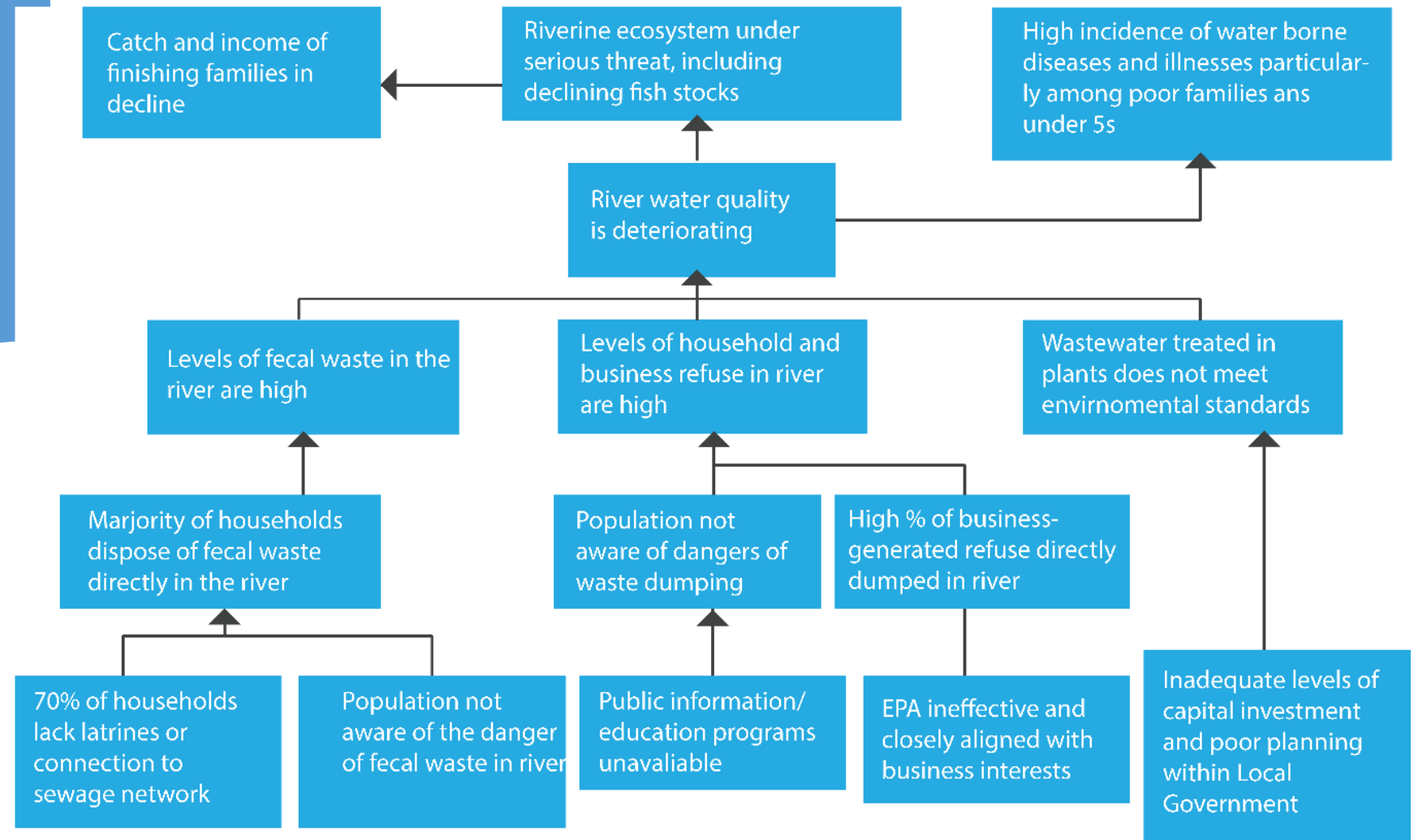
Project Manager's Role

- Identify the justification for their projects;
- Communicate the justification to a larger audience;
- Track the project's progress in achieving the value that justified its existence.

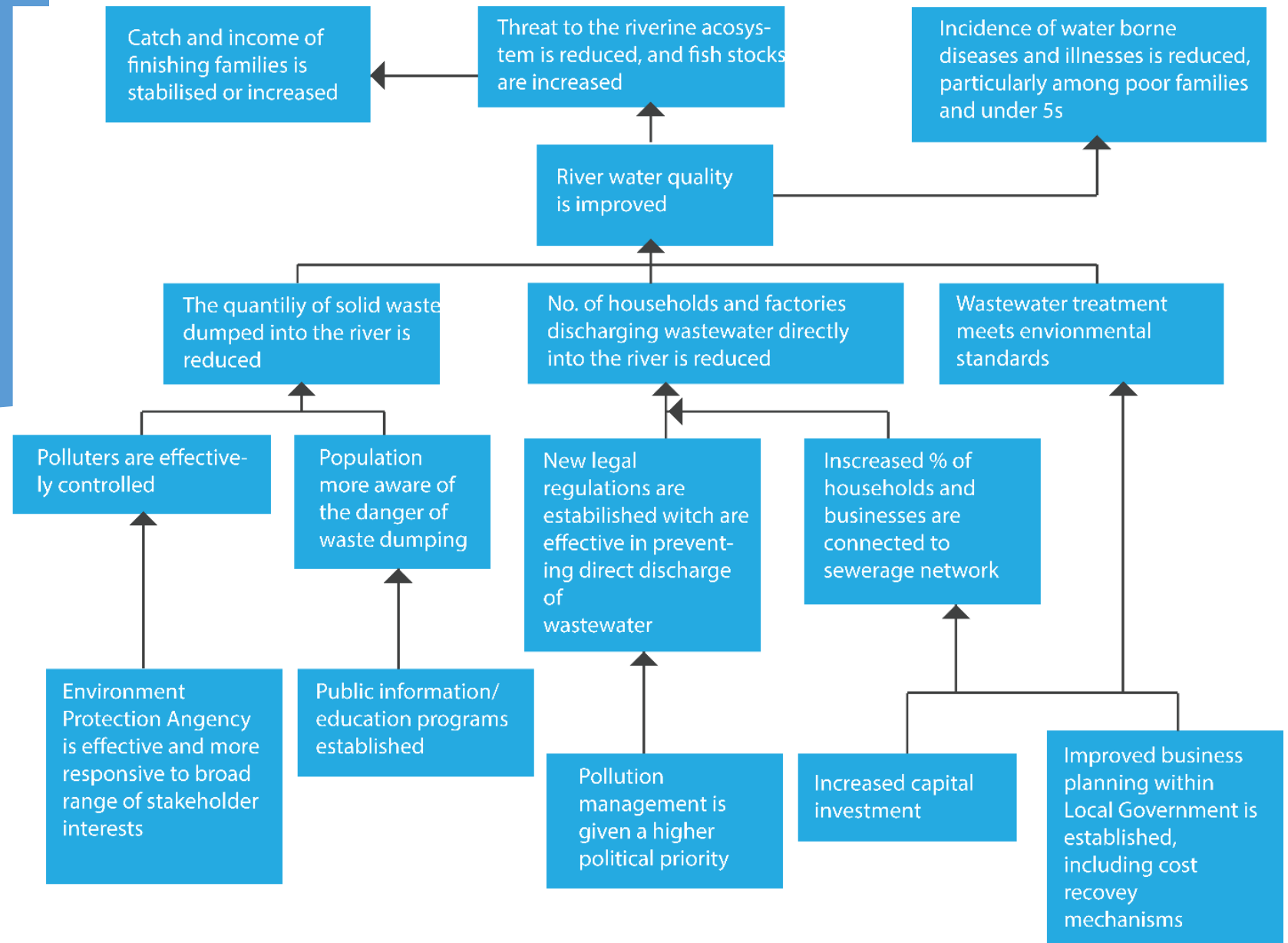
Problem-Based or Assets-Based Needs Identification

Problem-based Approach	Asset-based Approach
Define the problem Fix what is broken Focus on the negative	Search for solutions/assets that already exist Reinforce what is working Focus on the positive

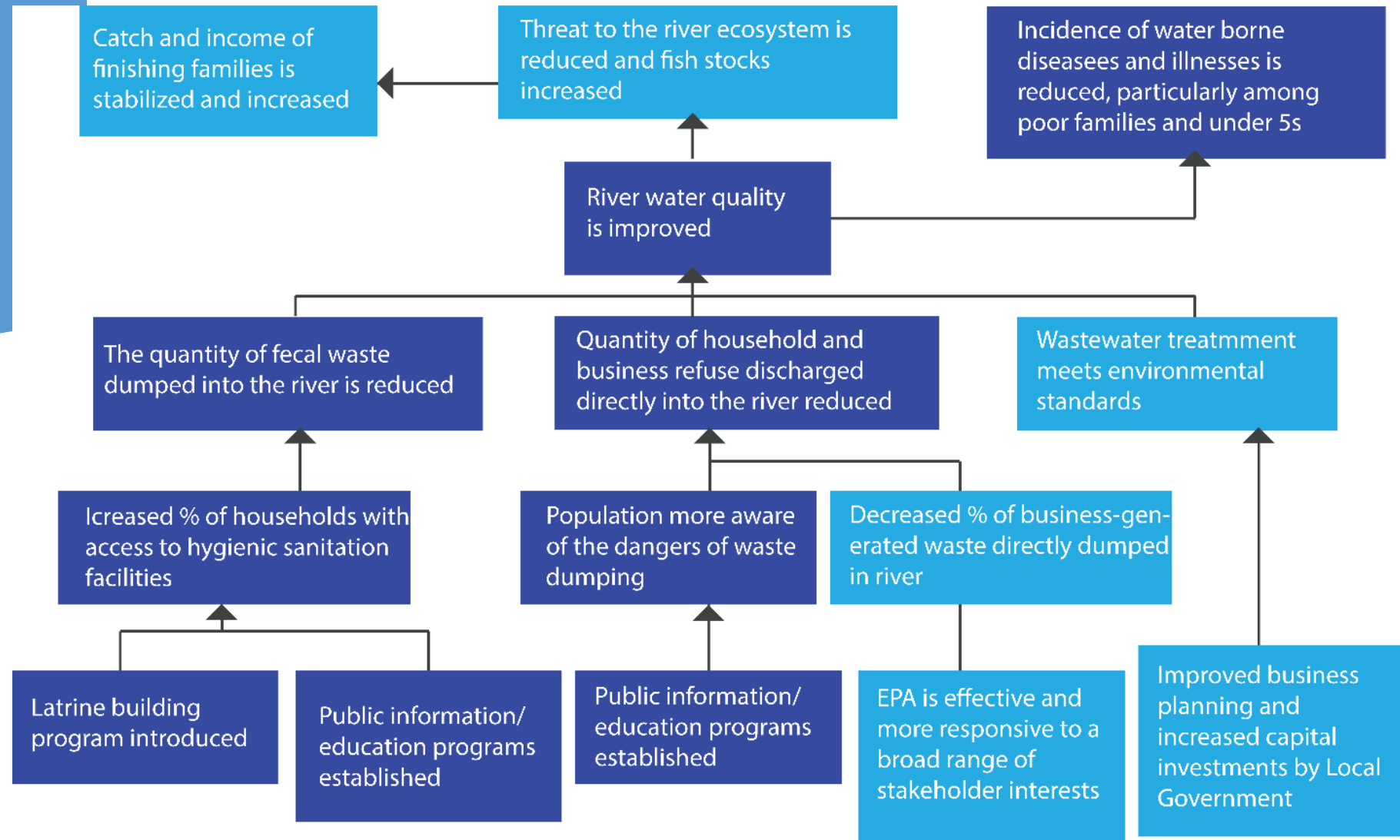
Delta River Problem Tree



Delta River Project Objective Tree



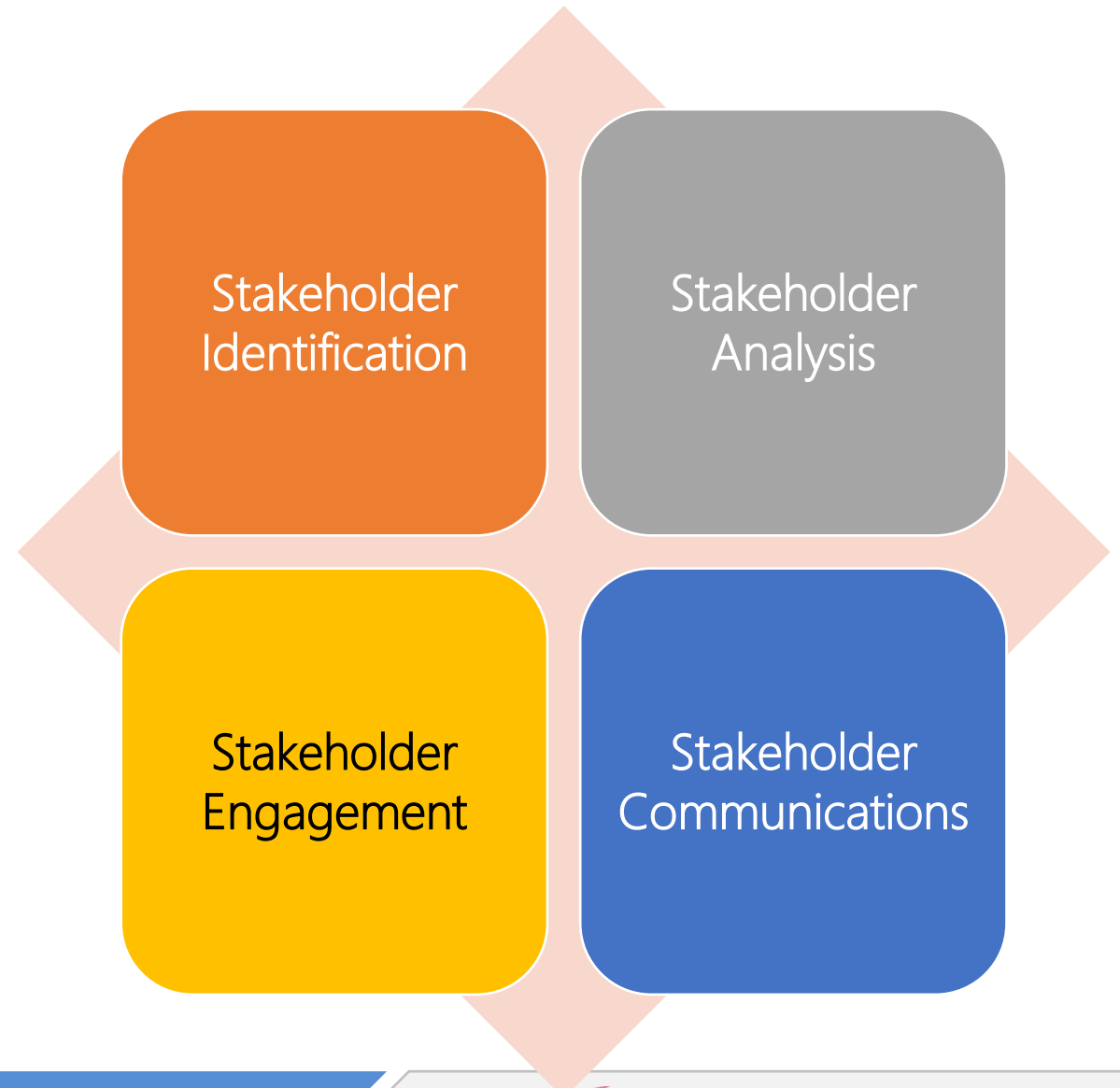
Delta River Project Alternatives Tree



Discipline 6: Stakeholder Management

Development projects are complex and impact an array of stakeholders. Experience shows that when stakeholders are overlooked or misunderstood in the project design, or their interests are poorly engaged or excluded during project planning and implementation, it can often result in unexpected and undesirable outcomes.

Components of Stakeholders Management



Stakeholder Identification

Users

Governance Stakeholders

Providers

Influencers

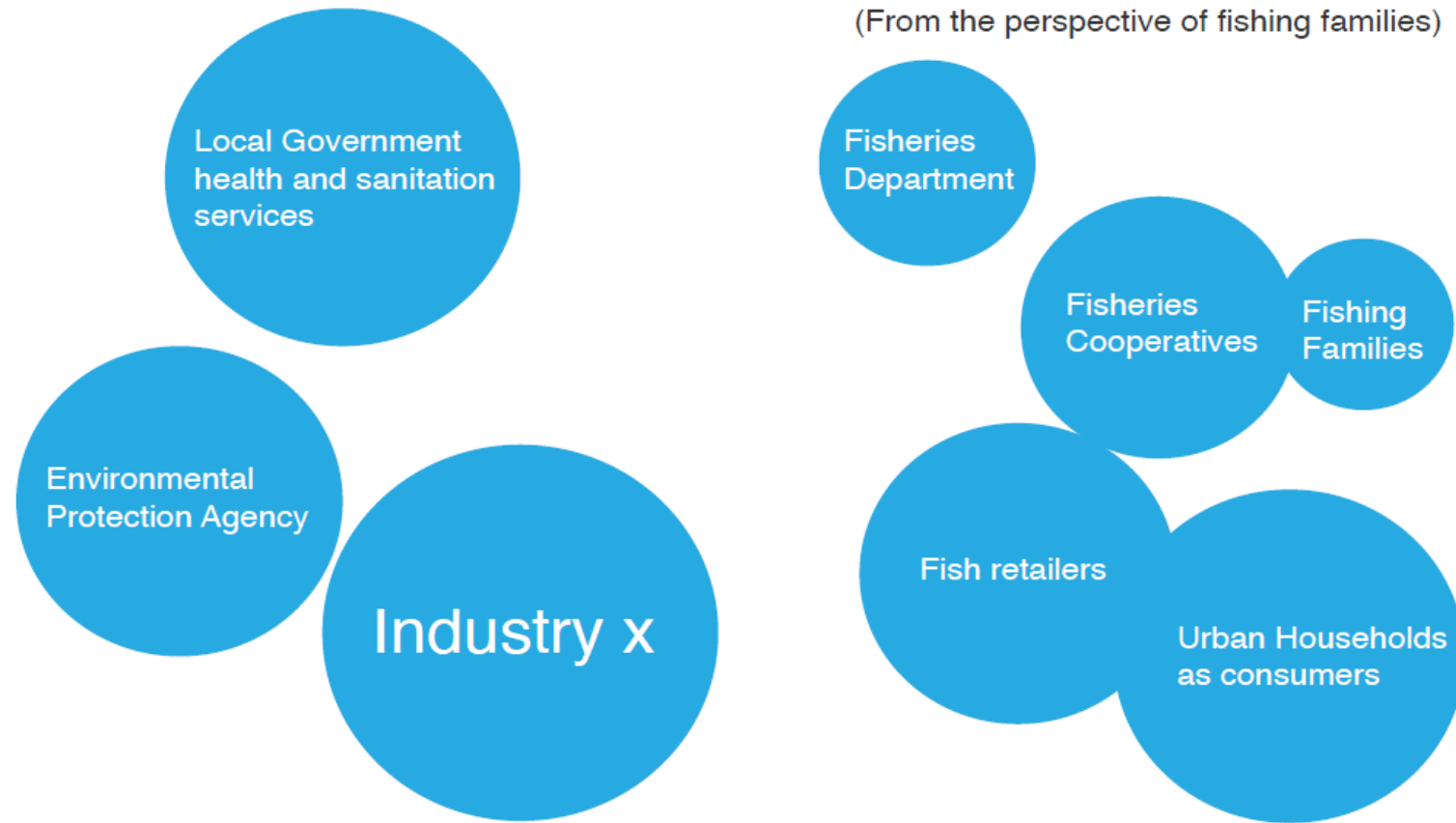
Dependents

Sustainers

Stakeholder Analysis

Venn Diagram - Stakeholders

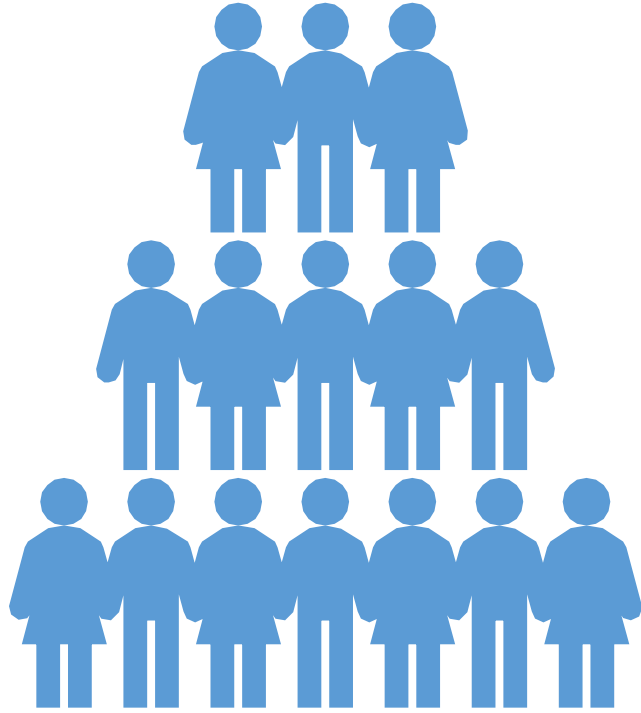
(From the perspective of fishing families)



Stakeholder Analysis

Stakeholder and basic characteristics	Interests and how they are affected by the problem	Capacity and motivation to bring about change	Possible actions to address stakeholder interests
Fishing families 20,000 families, low-income earners, small-scale family businesses, organized into informal cooperatives. Women actively involved in fish processing	Maintain and improve the means of livelihood Pollution is affecting volume and quality of catch Family health is suffering, particularly children and mothers'	Keen interest in pollution-control measures Limited political influence, given weak organizational structure	Support capacity to organize and lobby Implement pollution Identify and develop alternative income sources
Textile Industry Medium-scale industrial operation, poorly regulated and no unions. Well connected with ruling party. Poor environmental record	Textile Industry Medium-scale industrial operation, poorly regulated and no unions. Well connected with ruling party. Poor environmental record	Have financial and technical resources to employ new cleaner technologies Limited current motivation to change	Raise their awareness of social and environmental impact Mobilize political pressure to influence industry behavior Strengthen and enforce environmental laws
Households 45,000 households discharge waste and waste water into river also used as source of drinking water and fishing	Aware of textile industry's pollution and impact on water quality Want to dispose of own waste away from household Want access to clean water	Limited understanding of the health impact of their own waste/waste water disposal Appear willing to pay for improved waste management services	Raise awareness among households of the implications of their own waste disposal practices Work with communities and government to address water and sanitation issues.

Stakeholder Engagement



- **Responsible** A *Responsible* includes those who do the work to achieve the task. For each task there is typically one role that is the lead in completing the work, although others can be delegated to assist
- **Accountable** An *Accountable* must approve (sign off) the work that the *Responsible* person provides. There **must** be only one *Accountable* person specified for each task or deliverable.
- **Consulted** Those whose opinions are sought; and with whom there is two-way communication.
- **Informed** Those who are kept up-to-date on progress, often only on completion of a task or deliverable; and with whom there is just one-way communication.

Stakeholders engagement

Type of participation	Who is responsible?	Who is accountable?	Who needs to be consulted?	Who needs to be informed?
Project Task	Who is getting things done? Doing the work associated with the task?	Who signs off on the deliverable associated with the task?	Who needs to be actively solicited for input?	Who needs to be kept abreast through copies of reports, e-mail, etc.
Concept Note	Lead	Project Manager	Technical Advisor for Sanitation	Ministry of Health (MOH) officials
Design Assessment Analysis Logical framework & M&E Planning	Implementing NGO	Project Managers	Project participants Local MOH officials Donor	MOH officials (national level)
Proposal Writing and Submission	Project Manager	HQ Business Director	Local MOH officials Donor	Project Participants
Detailed Program Planning	Implementing NGO	Project Manager	Project participants Local MOH officials Technical Advisor for Sanitation Donor	MOH officials (national level)
Implementation	Implementing NGO	Project Manager	Program officer	Donor
Monitoring and Evaluation	Program Officer	Project officer	Regional Technical Advisor	MOH officials (national level)

Stakeholder Communications

Communication	Purpose	Audience	Author	Assigned To	Communication Vehicle	Frequency

- Which mechanism or vehicle will increase the likelihood that the message will be actually received, understood and acted upon?
- How much information will be included and at what level of detail?
- Which mechanism is most appropriate for the type of message?
- Which mechanism does the stakeholder prefer?
- What level of interaction is required (one way or two ways)?

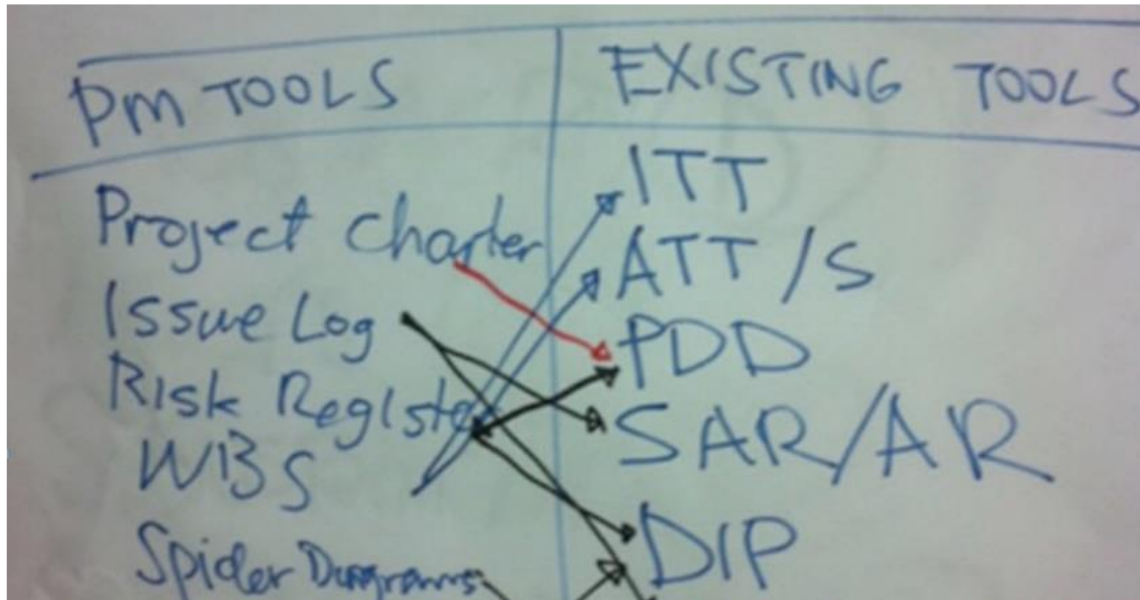
Adapting the PMD Pro

How do you make PMD Pro work for you?

A tale of two PMs after PMD Pro workshop!

- Two Project Managers completed PMD Pro training and gained clear knowledge and understanding of the methodology. Neither of their organizations, unfortunately, had much appreciation or understanding of project management.
- Upon returning to the workplace one Project Manager was told: “those PMD Pro tools are OK, but we don’t do it that way here”.
- The other Project Manager was told by a superior: “you should decide what tools and techniques you want and implement them on your own”.

Map the existing T&T and evaluate



Tool	Can I Implement now?	Do I want more Support?	What organizational changes must be made before we can properly adapt and use this tool?
WBS	Yes	No	Make sure my team and our collaborators contribute their specific expertise and detail
Network diagrams	Yes	No	Make sure my team understands both the purpose and processes.
Project Charter	No	Yes	Encourage our organization to agree to an approved format.
RACI diagram	Yes	No	Should be used to solicit inputs and share information with our stakeholders.
Change control	Yes	Yes	Must integrate and link with our project governance system

Factors to Consider when Adapting the PMD Pro

- PROGRAM CONSIDERATIONS
- SYSTEMS CONSIDERATIONS
 - Budgeting/financial reporting
 - Budget currency and exchange rates
- SIZE, COMPLEXITY AND RISK CONSIDERATIONS
 - Risk Planning and Management
 - Project Governance
- LEARNING AND COMPETENCY CONSIDERATIONS
- PERFORMANCE CONSIDERATIONS

Summary

- *A project Manager's job should NOT be reduced to a set of rigid rules that are applied thoughtlessly across each and every project, program or portfolio.*
- *Project Management is as much an 'art' as a 'science'.*
- *There will be circumstances where a PM tool or technique could be used but, for any number or good reasons, might NOT be the smartest choice. In other words, being too enthusiastic in requiring mandatory and uniform adoption of PM tools and techniques across all projects, programs or portfolios could be a huge mistake.*
- *Each and every Project Manager must learn to be disciplined and thoughtful -- becoming proficient at analyzing each individual project before carefully and collaboratively selecting and adopting the best from PMD Pro.*



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