Project Planning, Budgeting, Monitoring and Evaluation

A practical guide for implementers of HIV interventions
Background: Where does this Course fit in?

- Overall aim of 2-week training session
  - To empower the local church in addressing the AIDS situation in terms of both prevention and care

- How will this be done by your church?
  - Church to be agents of social change
  - By identifying a number of projects that will be implemented back at home to become agents of social change

- This course, a part of the workshop, is going to teach you about PROJECTS
  - How to plan, budget, implement, monitor and evaluate your AIDS project at your church

- This course will provide you with the PRACTICAL tools that you need to implement your project well
**Aim of this Course**

- This course is going to teach you:
  - What are the roles and core competencies of project managers;
  - How to plan an AIDS project, using practical project planning tools;
  - How to assess community needs and resources
  - How to budget for a project
  - How to plan and implement a monitoring and evaluation system for a project
How will you use the information in this Course?

- To help your church be an agent of change in your community
- To implement projects at the church
- To train others how to implement projects
- To make sure that the church leadership is on board and that everyone thinks of projects in the same way
- To ensure local ownership of projects
Definitions:

What is a Project?

- Set of related tasks that are coordinated to achieve a specific objective in given time limit
  - Coordinated
  - Achieve a specific objective
  - Time limit
- Temporary endeavour undertaken to create a unique product or service
  - Temporary
  - Unique product or service
**Definitions:**

*How are projects different?*

<table>
<thead>
<tr>
<th>Projects</th>
<th>Organisation’s work</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-off task</td>
<td>Varies little day-to-day</td>
</tr>
<tr>
<td>Specific deliverables</td>
<td>Measured by quantity produced</td>
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<tr>
<td>Time restrictions</td>
<td>On-going work</td>
</tr>
<tr>
<td>Many tasks</td>
<td>Tasks fit within functional boundaries</td>
</tr>
<tr>
<td>Multi-function teams</td>
<td>Interfaces between functional departments well defined</td>
</tr>
</tbody>
</table>
Definitions:

What is Project Management?

- Scope
- Time
- Cost
- Quality
- Human Resources
- Communications
- Risk
- Procurement
Definitions:

What skills do Project Managers need?

- SOFT SKILLS
  - Visible Leadership
  - Flexibility
  - Sound Judgment
  - Trustworthiness
  - Exhibits Several Communication Styles
  - Act as a Coach and Mentor
  - Active Listening Skills
  - Setting and Managing Expectations
  - Constructive Project Negotiations
  - Issue and Conflict Resolution
  - Organisational and Leadership Skills
Definitions:
What skills do Project Managers need?

- **HARD SKILLS**
  - Project Definitions
  - Project planning
  - Project implementation
  - Project monitoring and evaluation
Definitions:
What is a Programme?

- Group of projects
- Managed together
- All to achieve the same goal
- Social Ministry within a church
Definitions:

Who are Project Stakeholders?

- Individuals or organisations
- Directly involved in the project
- Their interests are positively or negatively influenced by the project
Definitions:

What are Project Phases?

- Projects consists of a number of activities
- Activities are grouped together to form phases
- Every phases has:
  - Definite start and end
  - Specific deliverables
    - Deliverable = tangible output from a task
- All project phases TOGETHER form the project life cycle
Definitions:

What are Project Phases?…continued

**PHASE 1:** Project Planning
- Community Needs Assessment
- Project Plan

**PHASE 2:** Project Implementation
- Project Activities Implemented
- Project Objective/s achieved

**PHASE 3:** Project Close-Out
- Project Evaluation
- Project Completion Report
Our Problem

- Read the article about HIV interventions
- You are in a team, and your team has been given a task by the senior pastor in the church. The task is:
  - The church was told by MARS Development Agency that it will provide funding for HIV activities to the church, if the church can submit a project plan
  - Your team has been given the task of developing a project plan
- We will use this example throughout the session to do all the exercises
Definitions: Project Phases

PHASE 1: Project Planning
1. Community Needs Assessment
2. Project Plan

PHASE 2: Project Implementation
1. Project Activities Implemented
2. Project Objective/s achieved

PHASE 3: Project Close-Out
1. Project Evaluation
2. Project Completion Report
Project Planning Phase

What needs to be done?  Step 1: Define the project scope

How will it be done?  STEP 2: Develop a WBS

How long will it take?  STEP 3: Develop a SCHEDULE

What do we need?  STEP 4: DETERMINE Resources

How much will it cost?  STEP 5: Develop a Budget
**Project Planning Phase**

What needs to be done?

Step 1: Define the project scope

How will it be done?

STEP 2: Develop a WBS

How long will it take?

STEP 3: Develop a SCHEDULE

What do we need?

STEP 4: DETERMINE Resources

How much will it cost?

STEP 5: Develop a Budget

*The Project Plan*
Step 1: Define Project Scope

- Assessing Needs and Resources
  - Of people with HIV and the community
  - Of the local environment
  - Of your organisation

- Defining the Project Scope
  - Project Justification
  - Project Objectives
  - Description of project
  - Project deliverables
Step 1: Define Project Scope

- Assessing Needs and Resources
  - Of people with HIV and the community
  - Of the local environment
  - Of your organisation

- Defining the Project Scope
  - Project Justification
  - Project Objectives
  - Description of project
  - Project deliverables
Assessing Community Needs & Resources

The assessment process:

- Carry out the Assessment
- Prioritise Needs
- Decide what to do
Assessing needs and resources of people with HIV and the community

- What are the treatment needs of people with HIV in your community?
- Where do people get HIV-related treatment in your community?
- How do people with HIV seek and use treatment in your community?
Assessing Community Needs & Resources…continued

- Assessing needs and resources of the local environment
  - Who is involved in providing treatment for people with HIV in your community?
  - What HIV-related treatment services are other organisations providing in your community?
  - How effective is the HIV-related treatment work being done by other organisations in your community?
Assessing Community Needs & Resources…continued

- Assessing needs and resources of your organisation
  - How does HIV-related treatment work fit with your organisation's mission?
  - What are your organisation's resources in relation to HIV-related treatment work?
  - How could your organisation's current programmes support future work on HIV-related treatment?
Step 1: Define Project Scope

- Assessing Needs and Resources
  - Of people with HIV and the community
  - Of the local environment
  - Of your organisation

- Defining the Project Scope
  - Project Justification
  - Project Objectives (SMART)
  - Description of project
  - Project deliverables
Project Planning Phase

What needs to be done?
- Step 1: Define the project scope

How will it be done?
- STEP 2: Develop a WBS

How long will it take?
- STEP 3: Develop a SCHEDULE

What do we need?
- STEP 4: DETERMINE Resources

How much will it cost?
- STEP 5: Develop a Budget
Step 2: Developing a WBS

- WBS = Work Breakdown Structure
- Project deliverables-oriented grouping of the full scope of the project
- Divides project deliverables into mini-deliverables
- Forms basis for:
  - Project Activities
  - Project Resources
  - Project Budgeting
- Lowest level is the level where you will estimate resources and costs
Step 2: Developing a WBS..continued

Level 1

1. AIDS Ministry Programme

Level 2

1.1 Home based Care Project

1.1.1 Counsellor training

1.1.2 HBC visits

1.2 VCT Project

1.2.1 Counsellor training

1.2.2 VCT counselling sessions
Project Planning Phase

What needs to be done? - Step 1: Define the project scope

How will it be done? - STEP 2: Develop a WBS

How long will it take? - STEP 3: Develop a SCHEDULE

What do we need? - STEP 4: DETERMINE Resources

How much will it cost? - STEP 5: Develop a Budget
Step 3: Developing a Schedule

- A schedule contains:
  - List of all activities
  - Duration of each activity
  - Sequence (order) of activities
- Depicted using a Gantt chart
  - Gantt chart is a horizontal bar chart that shows project activities in relation to each other and calendar time
## Step 3: Developing a Schedule...continued

<table>
<thead>
<tr>
<th>ID</th>
<th>Task Name</th>
<th>March</th>
<th>April</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Phase 1 - Needs Analysis</strong></td>
<td>26/03</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Telephonic interviews</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Write-up</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td><strong>Phase 2 - Procurement &amp; Training</strong></td>
<td>19/03</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Review of Quotes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Approval of Quotes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Contracting of organisations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Training Delivery</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td><strong>Phase 3 - Evaluation Report</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Information Collection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Write-up</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Step 3: Developing a Schedule...continued

- How to develop a schedule
  - Use the WBS that you developed
  - For every deliverable in the WBS, define all the activities required to complete this deliverable
  - Estimate durations for each activity
  - Put the activities in order
Step 3: Developing a Schedule...continued

<table>
<thead>
<tr>
<th>ID</th>
<th>Task Name</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Phase 1 - Needs Analysis</td>
<td>5 days</td>
<td>Thu 15/03/01</td>
<td>Wed 21/03/01</td>
</tr>
<tr>
<td>2</td>
<td>Telephonic interviews</td>
<td>1 wk</td>
<td>Thu 15/03/01</td>
<td>Wed 21/03/01</td>
</tr>
<tr>
<td>3</td>
<td>Write-up</td>
<td>1 wk</td>
<td>Thu 15/03/01</td>
<td>Wed 21/03/01</td>
</tr>
<tr>
<td>4</td>
<td>Phase 2 - Procurement &amp; Training</td>
<td>17.5 days</td>
<td>Thu 22/03/01</td>
<td>Mon 16/04/01</td>
</tr>
<tr>
<td>5</td>
<td>Review of Quotes</td>
<td>0.5 wks</td>
<td>Thu 22/03/01</td>
<td>Mon 26/03/01</td>
</tr>
<tr>
<td>6</td>
<td>Approval of Quotes</td>
<td>1 wk</td>
<td>Mon 26/03/01</td>
<td>Mon 02/04/01</td>
</tr>
<tr>
<td>7</td>
<td>Contracting of organisations</td>
<td>1 day</td>
<td>Fri 30/03/01</td>
<td>Mon 02/04/01</td>
</tr>
<tr>
<td>8</td>
<td>Training Delivery</td>
<td>2 wks</td>
<td>Mon 02/04/01</td>
<td>Mon 16/04/01</td>
</tr>
<tr>
<td>9</td>
<td>Phase 3 - Evaluation Report</td>
<td>5 days</td>
<td>Mon 16/04/01</td>
<td>Mon 23/04/01</td>
</tr>
<tr>
<td>10</td>
<td>Information Collection</td>
<td>1 wk</td>
<td>Mon 16/04/01</td>
<td>Mon 23/04/01</td>
</tr>
<tr>
<td>11</td>
<td>Write-up</td>
<td>0.5 wks</td>
<td>Wed 18/04/01</td>
<td>Fri 20/04/01</td>
</tr>
</tbody>
</table>
Step 3: Developing a Schedule...continued

- **How to develop a Gantt chart**
  - Build a table of cells with the entire length of the project
  - Use the schedule that you developed, and write down the activities in the left hand column
  - Write down the duration for each activity
  - Colour in the rows when the activity will take place
Project Planning Phase

What needs to be done?
Step 1: Define the project scope

How will it be done?
STEP 2: Develop a WBS

How long will it take?
STEP 3: Develop a SCHEDULE

What do we need?
STEP 4: DETERMINE Resources

How much will it cost?
STEP 5: Develop a Budget
Step 4: Determine Resources

- Types of resources
  - Human
  - Financial
  - Materials
- Not all resources need to cost money!
- Use the following sources:
  - Needs and resource assessment
  - schedule of activities that you prepared
- Write down the resources required to complete each task
Project Planning Phase

What needs to be done?
- Step 1: Define the project scope

How will it be done?
- STEP 2: Develop a WBS

How long will it take?
- STEP 3: Develop a SCHEDULE

What do we need?
- STEP 4: DETERMINE Resources

How much will it cost?
- STEP 5: Develop a Budget

The Project Plan
Step 5: Developing a Budget

- Types of costs
  - Internal costs
  - External costs
- Use Excel spreadsheet
- Cost every resource that was determined for the project
- Remember to write down all your assumptions
- Split types of costs
- Provide enough detail
And finally…developing a Project Plan

- Why develop a Project Plan?
  - Ensures responsibility
  - Provides a basis for motivation for funding
  - Ensures coordination during project implementation
  - Enhances control of the project
  - Makes sure that all aspects of the project is MANAGED
And finally...developing a Project Plan

- Time limit
- Cost budget
- Quality standards

We might find that we can meet one of these at the expense of the others.
Definitions:

What is Project Management?

- Management of:
  - Scope
  - Time
  - Cost
  - Quality
  - Human Resources
  - Communications
  - Risk
  - Procurement
The Project Plan format

- Introduction
- Project Scope (Step 1)
- Project WBS (Step 2)
- Project Schedule (Step 3)
- Project Resources & budget (Steps 4 & 5)
- Project Monitoring and Evaluation
- Project Human Resources
- Project Communications
- Project Procurement
- Project Risk

Scope
Time
Cost
Quality
HR
Communication
Procurement
Risk
## The Project Plan format

<table>
<thead>
<tr>
<th>PROJECT PLAN SECTION</th>
<th>TYPICAL CONTENTS OF THIS SECTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Background to the project</td>
</tr>
<tr>
<td>Project Scope (Step 1)</td>
<td>Project justification</td>
</tr>
<tr>
<td></td>
<td>Project objectives</td>
</tr>
<tr>
<td></td>
<td>Description of the unique product – the goods or service – that the project will provide</td>
</tr>
<tr>
<td></td>
<td>Project deliverables</td>
</tr>
<tr>
<td>Project WBS (Step 2)</td>
<td>WBS chart and assumptions</td>
</tr>
<tr>
<td>Project Schedule (Step 3)</td>
<td>List of all project activities</td>
</tr>
<tr>
<td></td>
<td>Gantt chart</td>
</tr>
</tbody>
</table>
# The Project Plan Format

<table>
<thead>
<tr>
<th>PROJECT PLAN SECTION</th>
<th>TYPICAL CONTENTS OF THIS SECTION</th>
</tr>
</thead>
</table>
| Project Resources and budget (Steps 4 and 5) | Project Budget  
All cost assumptions                                                                  |
| Project Monitoring and Evaluation (Quality)   | Monitoring and evaluation plan for project                                                        |
| Project Human Resources                     | How human resources will be managed in the project, and who will be responsible for the management of human resources  
Organisational structure for the project  
Roles and responsibilities of project team members                                      |
| Project Communications                      | How internal and external communications will be managed in the project                          |
| Project Procurement                         | How procurement will be handled in the project                                                   |
### The Project Plan format

<table>
<thead>
<tr>
<th>PROJECT PLAN SECTION</th>
<th>TYPICAL CONTENTS OF THIS SECTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Risk</td>
<td>This should be a short assessment of the major project risks, and how they will be managed if they occur. The following table can be used as a guideline:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DESCRIPTION OF RISK</th>
<th>PROBABILITY OF OCCURRENCE (L / M / H)</th>
<th>HOW RISK WILL BE MINIMISED / MANAGED</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>
Definitions:
Project Phases

**PHASE 1:**
Project Planning

**DELIVERABLES**
1. Community Needs Assessment
2. Project Plan

**PHASE 2:**
Project Implementation

**DELIVERABLES**
1. Project Activities Implemented
2. Project Objective/s achieved

**PHASE 3:**
Project Close-Out

**DELIVERABLES**
1. Project Evaluation
2. Project Completion Report
Project Implementation

- Look at all 8 aspects of project management
- Use the Project Plan to manage all aspects of the project
- Regular staff meetings
- Use Gantt chart as a basis
- Give regular reports and updates
- Assign actual expenditure to budget
- Importance of monitoring and evaluation
Definitions:
Project Phases

PHASE 1: Project Planning

- Community Needs Assessment
- Project Plan

PHASE 2: Project Implementation

- Project Activities Implemented
- Project Objective/s achieved

PHASE 3: Project Close-Out

- Project Evaluation
- Project Completion Report

DELIVERABLES

Project Close Out

- Neglected phase of most projects
- Administrative close out
- Contract close out
- 2 deliverables
  - Final Evaluation Report
  - Project Completion Report