**AFRICA INSTITUTE FOR PROJECT MANAGEMENT STUDIES, NAIROBI KENYA**

**NAME: DANIEL ACHIEK MAYOL**

**COURSE: POST GRADUATE DIPLOMA IN MONITORING AND EVALUATION**

**REGISTRATION NUMBER: AIMPS/2012/2019**

**MODULE SEVEN ASSIGNMENT**

**TELEPHONE NUMBER: +211921668800/+211915320986**

**EMAIL ADDRESS:** [**blackseedtmb@yahoo.com**](mailto:blackseedtmb@yahoo.com)

**MODULE 7 Questions:**

# **Q1:** Where M&E necessitates revision of project plans, outline key steps Program Management teams need to take towards this end. (10 mrks)

* **Project phases**: this is the life cycle, from initiation, planning and execution to monitoring, control and, finally, closure. So, you’re breaking the schedule of a project into more digestible parts. Think of them as mini-projects that can be denoted by milestones, which are diamond-shaped symbols on your schedule.
* **Schedule of activities:** this is basically a to-do list of what needs to be done to complete the project. It is here where you’ll collect everything big and small that is related to moving the project from start to finish. Then prioritize the list to get an understanding of the importance of each item.
* **Tasks:** these are small jobs make up the larger project. They should be small, incremental steps towards the final product. You can pull them from the schedule of activities you created in the prior step.
* **Duration:** calculating how long you think each task and phase will take. These are estimates, but they need to be figured out against the larger timeframe you have for completing the project. Be realistic, remember that the project has a deadline.
* **Dependencies:** noting any tasks that are dependent on other tasks being completed before they can begin. You can link these dependencies and set up notifications, so your team knows when they’re complete, so as not to block team members and send the project off-track.
* **Resources:** what you need to do the project. This can be anything from the people on your project team to the equipment and project management software they’ll need to complete their tasks to the place where the work will be done to vendors and outside contractors, etc.
* **Timeframes:** working back from your deadline to determine how much time you have for each phase of the project. [A timeline gives you a visual](https://www.projectmanager.com/software/use-cases/project-timeline-software) of the schedule and the tasks, which allows you to better know how to space out your workload.
* **Budget:** what are the costs involved in allocating all the resources you’ll need to complete the project? This number is going to need approval, and is going to be within a range, so you must be realistic when making estimates.
* **Assemble a team:** you need the people who will execute your plan, based on the skills required and experience and whether they’re going to work remotely, etc. You want to include time for training, if necessary, and [team-building exercises](https://www.projectmanager.com/training/team-building-activities) if they’ve never worked together.
* **Monitor progress:** have a plan in place to track the progress of your project plan. Online project management tools offer functions that calculate the actual versus planned progress in real-time, which gives you the control to change issues before they become problems. Project planning software gives you the tools you’ll need to monitor the project. Because it’s online, you’ll know immediately when something begins to fall off-track. The sooner you have that information, the better.

**Steps to Creating a Project Management Plan**

As you begin to build your project plan you need to define a number of things to give you a clear picture of what it is you’re planning to do.

* **Determine the project scope:** It sets up the boundaries of the project and the responsibilities of each team member. It does this by determining and documenting specific project goals, deliverables, features, functions, tasks, deadlines and costs.
* **Identify tasks milestones:** tasks are small jobs that make up the project, while a group of related tasks in the project that signal the end of a project phase are called milestones. These milestones, indicated as diamond-shaped icons on your schedule, help you further break down the larger project into more manageable pieces.
* **Quantify your effort:** figure out how much of something you’ll need. You need to estimate which resources and how much of them are going to be required when you’re planning to come up with a feasible budget.
* **Allocate the resources:** get the project planning tools, teams assembled, vendors, etc. This is where you begin to take the disparate parts of the project and organize them.
* **Make a schedule:** take the above data and put it on a timeline. Here is where you can lay out all the tasks and milestones that mark the different phases of the project.
* **List dependencies:** link tasks that rely on one another. Task dependencies are then identified and can be automated to alert you during the project when they are completed or if they’re not progressing as planned.
* **Document everything:** always keep a detailed paper trail. You want to have all the paperwork for each step of the project plan. That includes contracts and timesheets for your team. At the end of the project these documents will be crucial to closing the project correctly.

Remember, you have already created a business case, which offers a general view of the project. The project management plan is where you take that view and drill down in greater detail. This project plan is not something you write and are done with. You will be revisiting it throughout the life cycle of the project, referring and revising it as you execute that project.

**How Project Tools Can Help**

[Planning tools](https://www.projectmanager.com/software) are going to make creating your project plan that much easier and efficient. If you’re not already using an online project planning tool, get one. There are many tools that required little to no training, and don’t cost an arm and a leg.

Online PM tools make sharing your project management plan simple. When you start assigning tasks and share the plan with team members, you want to have a tool that can be accessible to the techie and the luddite alike. Because everyone on the team will be using this tool to update their statuses, and that means you’ll get real-time data on the project that allows you to manage it more productively.

An [online Gantt chart](https://www.projectmanager.com/software/gantt-chart) as one of the features of your project management software is going to help with scheduling and task management. Not only does a Gantt chart populate a bar chart to give you a visual timeline that can be color-coded to help you see the duration of each task, you can easily link task dependencies.

Now team members will not be blocked by a dependent task being left incomplete. You’ll also be able to automate notifications to keep both you and your team on track with timely reminders. If you need to allocate more resources to a task, that’s easy too. It can all be done on the Gantt chart, which is online, so everyone is updated together and on the same page.

Once you’ve planned a project, of course, you must execute it. Things are rarely going to go as planned, but as we said, you don’t throw away the project plan but tweak it. That’s where PM tools can be so helpful. That calculate the planned versus actual time your project plan is taking by monitoring all the updates and providing you with the information you need to keep the project on track.

**Project Management Planning for the Accidental Project Manager**

Chances are you’re new to project planning. Maybe someone threw a project on your desk and told you to manage it, so you need advice, from getting a team together to monitoring their progress. That’s what we call an “[Accidental Project Manager](https://www.projectmanager.com/blog/planning-for-the-accidental-project-manager).”  The basics noted above give you a road map into the what could seem like the dark woods of a project. Now you have landmarks and a pathway through it.

[Project planning](https://www.projectmanager.com/project-planning) is just a process of organizing the bits and pieces that add up to the goal outlined in your project. You can have a plan, but you also need the right tools to implement it properly. Start your project off with a thorough plan and invest in the right PM tools to manage that plan and you’re well on your way to completing your project on time and within budget.

*When you’re creating your project management plan there are a lot of moving parts to keep track of. With an*[*online project management tool*](https://www.projectmanager.com/)*that task is vastly improved. You have features, such as an online Gantt chart, to help visualize your schedule and adjust it easily. Plus, there much more, why not see for yourself? Take this free 30-day trial and let us know what you think.*

# The Project Life Cycle (Phases)

The project manager and project team have one shared goal: to carry out the work of the project for the purpose of meeting the project’s objectives. Every project has a beginning, a middle period during which activities move the project toward completion, and an ending (either successful or unsuccessful). A standard project typically has the following four major phases (each with its own agenda of tasks and issues): initiation, planning, implementation, and closure. Taken together, these phases represent the path a project takes from the beginning to its end and are generally referred to as the project “life cycle.”

**Initiation Phase**

During the first of these phases, the initiation phase, the project objective or need is identified; this can be a business problem or opportunity. An appropriate response to the need is documented in a business case with recommended solution options. A feasibility study is conducted to investigate whether each option addresses the project objective and a final recommended solution is determined. Issues of feasibility (“can we do the project?”) and justification (“should we do the project?”) are addressed.

Once the recommended solution is approved, a project is initiated to deliver the approved solution and a project manager is appointed. The major deliverables and the participating work groups are identified, and the project team begins to take shape. Approval is then sought by the project manager to move onto the detailed planning phase.

**Planning Phase**

The next phase, the planning phase, is where the project solution is further developed in as much detail as possible and the steps necessary to meet the project’s objective are planned. In this step, the team identifies all of the work to be done. The project’s tasks and resource requirements are identified, along with the strategy for producing them. This is also referred to as “scope management.” A project plan is created outlining the activities, tasks, dependencies, and timeframes. The project manager coordinates the preparation of a project budget by providing cost estimates for the labor, equipment, and materials costs. The budget is used to monitor and control cost expenditures during project implementation.

Once the project team has identified the work, prepared the schedule, and estimated the costs, the three fundamental components of the planning process are complete. This is an excellent time to identify and try to deal with anything that might pose a threat to the successful completion of the project. This is called risk management. In risk management, “high-threat” potential problems are identified along with the action that is to be taken on each high-threat potential problem, either to reduce the probability that the problem will occur or to reduce the impact on the project if it does occur. This is also a good time to identify all project stakeholders and establish a communication plan describing the information needed and the delivery method to be used to keep the stakeholders informed.

Finally, you will want to document a quality plan, providing quality targets, assurance, and control measures, along with an acceptance plan, listing the criteria to be met to gain customer acceptance. At this point, the project would have been planned in detail and is ready to be executed.

**Implementation (Execution) Phase**

During the third phase, the implementation phase, the project plan is put into motion and the work of the project is performed. It is important to maintain control and communicate as needed during implementation. Progress is continuously monitored, and appropriate adjustments are made and recorded as variances from the original plan. In any project, a project manager spends most of the time in this step. During project implementation, people are carrying out the tasks, and progress information is being reported through regular team meetings. The project manager uses this information to maintain control over the direction of the project by comparing the progress reports with the project plan to measure the performance of the project activities and take corrective action as needed. The first course of action should always be to bring the project back on course (i.e., to return it to the original plan). If that cannot happen, the team should record variations from the original plan and record and publish modifications to the plan. Throughout this step, project sponsors and other key stakeholders should be kept informed of the project’s status according to the agreed-on frequency and format of communication. The plan should be updated and published on a regular basis.

Status reports should always emphasize the anticipated end point in terms of cost, schedule, and quality of deliverables. Each project deliverable produced should be reviewed for quality and measured against the acceptance criteria. Once all the deliverables have been produced and the customer has accepted the final solution, the project is ready for closure.

**Closing Phase**

During the final closure, or completion phase, the emphasis is on releasing the final deliverables to the customer, handing over project documentation to the business, terminating supplier contracts, releasing project resources, and communicating the closure of the project to all stakeholders. The last remaining step is to conduct lessons-learned studies to examine what went well and what didn’t. Through this type of analysis, the wisdom of experience is transferred back to the project organization, which will help future project teams.

**Example: Project Phases on a Large Multinational Project**

A U.S. construction company won a contract to design and build the first copper mine in northern Argentina. There was no existing infrastructure for either the mining industry or large construction projects in this part of South America. During the initiation phase of the project, the project manager focused on defining and finding a project leadership team with the knowledge, skills, and experience to manage a large complex project in a remote area of the globe. The project team set up three offices. One was in Chile, where large mining construction project infrastructure existed. The other two were in Argentina. One was in Buenos Aries to establish relationships and Argentinian expertise, and the second was in Catamarca—the largest town close to the mine site. With offices in place, the project start-up team began developing procedures for getting work done, acquiring the appropriate permits, and developing relationships with Chilean and Argentine partners.

During the planning phase, the project team developed an integrated project schedule that coordinated the activities of the design, procurement, and construction teams. The project controls team also developed a detailed budget that enabled the project team to track project expenditures against the expected expenses. The project design team built on the conceptual design and developed detailed drawings for use by the procurement team. The procurement team used the drawings to begin ordering equipment and materials for the construction team; develop labor projections; refine the construction schedule; and set up the construction site. Although planning is a never-ending process on a project, the planning phase focused on developing enough details to allow various parts of the project team to coordinate their work and allow the project management team to make priority decisions.

The implementation phase represents the work done to meet the requirements of the scope of work and fulfill the charter. During the implementation phase, the project team accomplished the work defined in the plan and planned when the project factors changed. Equipment and materials were delivered to the work site, labor was hired and trained, a construction site was built, and all the construction activities, from the arrival of the first dozer to the installation of the final light switch, were accomplished.

The closeout phase included turning over the newly constructed plant to the operations team of the client. A punch list of a few remaining construction items was developed, and those items completed. The office in Catamarca was closed, the office in Buenos Aries archived all the project documents, and the Chilean office was already working on the next project. The accounting books were reconciled and closed, final reports written and distributed, and the project manager started on a new project.

**Q2:** Briefly explain in about 250 words the key actions required at project-level monitoring work and describe the key variances between project level monitoring and program level monitoring. (10mrks).

the fact is that for decades these three words have become a mantra for both corporations and government agencies that want to affect meaningful change in their organizations and need to know that it is really and truly taking place.

Given the pace of change, and the necessary steps to make meaningful, long-term change happen—especially in a large organization—verification typically needs to take place frequently, throughout the lifecycle of any project. In other words, organizations could just as easily embrace the motto: “Trust, but*monitor*.”

Project monitoring is a necessary component of all project management plans. Without project monitoring, organizations may fail to understand why projects go awry, and even successful projects may have insufficient impact. The project coordinator (or project leader) and their supervisor should plan from the start on project monitoring being an *important,* *integrated*, and *continuous* part of the project management cycle.

Within the project monitoring feedback loop, the information and results from the ongoing project should not only be reported back up the chain (to supervisors, managers, the top executives and potentially the board or other invested parties) on a regular basis, but also back down to the project participants.  When necessary, information should also go out to the frontline employees as well. It is the role of the project coordinator and the project coordinator’s supervisor to monitor project information and use this two-way flow of project monitoring to ensure the implementation of projects as efficiently and effectively as possible.

By following these four steps, project leaders can better ensure the successful flow of information, results, feedback and advice throughout the project monitoring process:

**1.    Begin with a plan for project monitoring.**

It may sound simplistic, but many an important project was started in a hurry and bluster, with the plans for any kind of project monitoring pushed to the side (to an undecided ‘later date’) in the interests of quickly moving forward. This kind of ‘act first, think later’ strategy has led to myriad of planning challenges, and can ultimately lead to ineffectual results or a lack of learning or benefit from the project in the long-term.

Project leaders must begin with at least a basic plan for how, when, and what about the project they plan to monitor. Base the plan on realistic targets.  If the project leader cannot commit to monitoring and reporting results back on a bi-weekly basis, plan from the start to report back findings on a monthly basis. The project leader should make sure to consider the resources they will need to monitor adequately and report back information about the progress of the project.  Resources may include technological resources and personnel (on the project team or potentially outside of it)— ensuring those resources can be available to them as needed for the purpose of project monitoring. Monitoring a project is often not a linear endeavor. Oftentimes, the project will require more frequent monitoring, results review, and feedback early on to ensure that the progress is moving along, that all the participants know their roles, and that the project is generally meeting its objectives in general.

[***Project Check-Ups to Keep Your Projects Healthy***](http://www.projecttimes.com/articles/project-check-ups-keep-your-projects-healthy.html)

Increasingly there is a greater emphasis on demonstrating performance rather than simply producing outputs, which could change the way monitoring and reporting on projects is handled. But it is important to remember that monitoring is the continuous process of assessing the status of the project and how it is developing in relation to the approved work plan and budget. Successful project monitoring plans, while they may seem superfluous, help to improve performance and achieve results.

**2.  Report to management.**

Project monitoring may be carried out informally through weekly meetings, or formally through written reports. But what is most important is that there is a regularly scheduled time each week, month, or quarter when results or progress about on-going projects is expected.

Regular monitoring enables the project leader to identify actual or potential problems as early as possible so that they can make timely adjustments to project plans and move forward. In addition to tracking the outputs and measures of their project team’s contributions and periodic results, project leaders should be mindful of spending and milestone tracking. Particularly in today’s budget-conscious environment, the C-suite must be cognizant of the bottom line. If a project looks like it may go over budget, or if earlier results are indicating a need for greater spending or extending the project, top managers must be alerted.

similarly, it is important for the top brass to be made aware of how the project is faring in meeting its prime objectives, and the milestones that lead up to these goals. When reporting to organizational leadership, project leaders should focus on results that indicate whether a strategy is relevant and efficient or not.

**3.  Recommend actions to improve on the project.**

This is the step that tends to come to mind first when people think of monitoring a project. It’s important to remember that recommendations *without* the previous foundation of solid planning and feedback from management and the project team itself, based on budgeting and meaningful goal setting, will be relatively pointless.

Project leaders should think in terms of priorities—reference the project plan or the mission statement to keep focus on the ultimate goals of the project. What are the key process improvements that will offer the greatest bang for the buck in terms of keeping that project running smoothly, efficiently, and on-time? Recommendations could include corrective actions, preventative actions, or changes in the plan or the project execution.

When making recommendations, guidance should be as specific as possible: direct the project team member deemed responsible to make a specific action by a specific date and make certain they are slated to report back to the project leader on the results of their action. Keep in mind the team’s own health and feedback: offer constructive criticism and praise when it makes sense to strengthen the goals of the project and the team individuals’ work too.

**4.   Confirm that actions are being followed.**

Trust that your team, with proper guidance and oversight, will make the appropriate corrections as needed. But again, the project leader must verify that recommendations are being followed and the project is staying on track.

Project leaders should consider the use of automated tools and technologies in order to track team members’ performance and response; share documents, feedback, on-going recommendations and suggestions, and forecasts; and communicate among team members about meetings, and updates in the project management plan. At the most basic level, the project leader must track the differences between what was planned, and what is happening to ensure that project objectives are being met, the accuracy of initial cost estimates and planned resource requirements, and whether the expected outputs are being created.

In the project management world, **variance** is a measurable change from a known [standard](https://project-management-knowledge.com/definitions/s/standard/) or [baseline](https://project-management-knowledge.com/definitions/b/baseline/). In other words, variance is the difference between what is expected and what is accomplished. This is a different definition of variance compared to statistics where variance is defined as the squared deviation from the mean! You need to understand what kind of variance is referred to since there is a huge difference between these two concepts of variance.

In project management, variance baseline is established by identifying the cost, schedule and scope. Scope defines all the work which needs to be done. The project management team creates a work-breakdown structure (WBS) which is a hierarchical view of all tasks to be accomplished. The cost and schedule is then identified according to the work-breakdown structure (WBS). The cost for each goal or [task](https://project-management-knowledge.com/definitions/t/task/) is [estimated](https://project-management-knowledge.com/definitions/e/estimate/)sometimes by using an average daily, hourly, monthly or yearly rate. The fixed costs are identified for each goal or task. In addition, the project management workers estimate how long in days or hours a goal or task is to be accomplished, Then they create a time-phased [budget](https://project-management-knowledge.com/definitions/b/budget/) to quantify the performance cost.

After identifying the scope, schedule and cost, the project managers create a plan to manage variances from the triple [constraints](https://project-management-knowledge.com/definitions/c/constraint/) of scope, schedule and cost. A positive variance means the project is going on ahead of schedule or is under the cost. A negative variance means the project is late or over the cost.

Variance tracking is key to project management and needs a logical approach. The project managers identify the variance thresholds and develop a plan in case it happens.

**reference**

* E/ICEF/2003/AB/L.11, Internal Audit Activities in 2002

* E/ICEF/2002/10, Report On The Evaluation Function In The Context Of The MTSP
* CF/EXD/2005-004, Charter of Authorities and Responsibilities of the Office of Internal Audit

* CF/EXD/1997-01 Information Sharing on Evaluations and Studies
* CF/PD/PRO/ 1998-07, Guidelines for Annual Reviews and Mid-Term Reviews

* CF/PD/PRO/1986-001 Framework for Improving the Monitoring and Evaluation of Child Survival and Development Activities

* WHO/CDS/CSR/LYO/2004.15
* Evaluation Technical Notes

* Monitoring and Evaluation Training Resource

* OECD-DAC guidance

.

* Chapter 4, Section 1. Annual Programme Review
* This term is defined in the 3rd and the 4th edition of the [PMBOK](https://project-management-knowledge.com/definitions/p/project-management-body-of-knowledge-pmbok/)

.

* [**Cost Variance (CV)**](https://project-management-knowledge.com/definitions/c/cost-variance-cv/) The term cost variance, also known by the abbreviation of CV, refers specifically to the true measurement of cost performance...
* [**Variance at Completion (VAC)**](https://project-management-knowledge.com/definitions/v/variance-completion-vac/) Variance at Completion (VAC) is a projection of the budget surplus or deficit. It is expressed as the difference of...

* [**Variance Analysis**](https://project-management-knowledge.com/definitions/v/variance-analysis/) Within the realm of project management, the concept of variance analysis is a central one. Variance analysis is the means...

* [**Scheduled Variance**](https://project-management-knowledge.com/definitions/s/scheduled-variance/) Schedule variance is a quantitative measure used by project management personnel to determine schedule performance during or after the completion...
* [**To-Complete Performance Index**](https://project-management-knowledge.com/definitions/t/complete-performance-index/) The To-Complete Performance Index (TCPI) is a tool in project management that is used to measure the cost performance required...