

# INSTITUTIONAL TRAINING

## Module 1.12: PROJECT MANAGEMENT



## ACKNOWLEDGEMENTS

The materials used to develop this training module were developed and compiled by a number of individuals and organisations over the past 15 years as part of the Namibian CBNRM Programme. Acknowledgement is thus given to all contributing NACSO members, NACSO's international development support partners, and the individual and collective experiences of the NACSO members and partners who made the production of this module possible. The further development of the training material has been made possible with support from MCA Namibia.



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# GENERAL TRAINING TIPS

## Preparation:

- Prepare each session in advance and ensure all necessary materials and visual aids are available (use visual aids wherever possible to enhance your training).
- Be aware of local customs – remember to open and close the training day with a prayer and give due recognition to any traditional leaders present.
- Provide translation services where necessary (this will need to be arranged in advance – it may not be appropriate to ask a participant to translate).

## General training and presentation guidelines:

- Use good time management to ensure every aspect of your training is completed – but take into account the possible need for translation and be prepared to slow down if necessary to ensure that all participants understand.
- Maintain good eye contact with participants.
- Speak clearly.
- Keep your training language simple and appropriate to your audience.
- Bridge one topic to the next.
- Provide clear instructions for activities and check to see if your instructions are understood.
- Where appropriate, summarise each component of the module.
- Avoid reading from this trainer's manual.

## Visual presentation:

- Write clearly and boldly if using flipchart sheets.
- Keep your visual aids clear – avoid blocking participants' view of visual aids.

## Involving the participants:

- Encourage questions and participation.
- Ask questions to get participants thinking about the topic and key issues.
- Keep the group focused on the task, but take breaks if participants are tired and losing concentration – be aware of body language.
- Be patient and courteous with all participants.
- Talk to your participants and not to the flipchart.
- Acknowledge the comments and feedback from participants.



**NB:** Where we wish to indicate that text in this module refers to an activity that training participants are expected to undertake, we have employed this little icon.



## ABOUT MODULE 1.12: PROJECT MANAGEMENT

<b>OBJECTIVES:</b> People who receive training in MODULE 1.12 will gain knowledge on:	<ol style="list-style-type: none"> <li>1. Types of projects arising from the AGM, benefits distribution, community projects etc.</li> <li>2. Phases of a project: idea, plan, proposal, implementation, monitoring and reporting (termination)</li> <li>3. Basic requirements and best practices of any project</li> <li>4. A practical exercise in project or major activity management</li> </ol>
<b>COMPETENCIES:</b> People who receive training in MODULE 1.12 will be able to:	<ol style="list-style-type: none"> <li>1. Show a basic understanding of project management</li> <li>2. Describe the basic sequence and best practices of any project or major activity the conservancy implements</li> <li>3. Demonstrate that they have planned a major conservancy activity, with management procedures developed</li> </ol>
<b>MODULE 1.12 is intended for:</b>	Conservancy Manager and the Conservancy Committee
<b>Duration of MODULE 1.12:</b>	The training for this Module will usually last 2 days

<b>To train this MODULE 1.12 you will need to have (enough for everyone):</b>	<b>Check</b>
Flipchart stand, sheets and different coloured marker pens ("kokies")	✓
Module 1.12 Handouts #1 – #9	
Prepared Flipchart Sheets #1 – #5 if you prefer to use them (can be laminated for duplicate use)	
Paper and pens for participants	
Pre-cut pieces of card and PresStick	

**The training of this MODULE 1.12 will follow generally this schedule:**

<b>TOPIC 1:</b>	Types of projects
<b>TOPIC 2:</b>	Phases of a project cycle
<b>TOPIC 3:</b>	Basic requirements and best practices of any project
<b>TOPIC 4:</b>	Practical exercise in project (or major activity) management
<b>SELF-ASSESSMENT:</b>	Assessing participants' understanding of this Module (Handout #9)



## NOTE TO TRAINERS/FACILITATORS: HOW TO USE THIS TRAINER'S MANUAL

At workshops where participants have come from different conservancies, for certain activities it will sometimes be advisable to divide them up into 'conservancy groups' (i.e., groups comprised of participants who all come from the same conservancy) in order that the product of the activity is conservancy-specific. The instructions for these activities will make it clear if the participants should carry out the exercise as conservancy groups.

Sometimes, topics have been divided into 'sessions', with amounts of time allocated to them. These time frames are a guide only, and trainers/facilitators might need to adapt them as they deliver the Module.



## KEYWORDS and ACRONYMS for this MODULE

<b>Activity Schedule</b>	A graphic representation (professional project managers call it a 'Gantt Chart') setting out the timing, sequence and duration of project activities. It can also be used to identify milestones for monitoring progress, and to assign responsibility for achievement of milestones
<b>beneficiaries</b>	Those who benefit (in whatever way) from the implementation of the project
<b>contractor</b>	The public or private company/organisation/consortium or individual with whom the contract is entered into
<b>core objectives</b>	Objectives that focus on the needs expressed and the intervention itself
<b>EIA</b>	Environmental impact assessment: an assessment of the possible positive or negative impacts that a proposed project may have on the environment, together consisting of the natural, social and economic aspects
<b>feasibility</b>	Addresses the issue of whether the project objectives can be really achieved. Assesses costs as compared to the value attained
<b>Feasibility Study</b>	Feasibility studies aim to objectively and rationally uncover the strengths and weaknesses of the existing business or proposed venture; opportunities and threats as presented by the environment; the resources required to carry through; and ultimately the prospects for success
<b>inputs</b>	The resources required to undertake the work programme and produce the outputs, e.g., personnel, equipment, and materials
<b>institution</b>	A formally-constituted organisation (such as a conservancy) with a life of its own beyond the life of individual members
<b>LFW</b>	Logical Framework: a management tool mainly used in the design, monitoring and evaluation of projects
<b>LOE</b>	Level of effort. How much work is required to complete a task – often counted in hours, days or weeks
<b>monitoring</b>	The systematic and continuous collecting, analysis and use of information for the purpose of management and decision making
<b>NGO</b>	Non-governmental organisation
<b>objective</b>	Description of the aim of a project. It refers to activities, results, project purpose and decision making
<b>outputs</b>	The real products (goods and services) produced by undertaking a series of tasks as part of the planned work of the activity
<b>partners</b>	Those who implement the activity in-country (who are also stakeholders, and may be a 'target group')
<b>project</b>	Sets of coordinated activities aimed at achieving new and tangible objectives within a specific time
<b>project cycle</b>	The way in which projects are planned and carried out follows a sequence beginning with an idea for a specific action, which then is formulated, implemented and evaluated with a view to improving the strategy and further action



<b>project management</b>	The discipline of planning, organising, securing and managing resources to bring about the successful completion of specific project goals and objectives
<b>project stakeholders</b>	People or organisations either actively involved in the project, or whose interests may be affected by the project being implemented
<b>target group</b>	The group/entity that will be directly positively affected by the activity at the activity outcome level. This may include the staff from partner organisations
<b>WBS</b>	Work Breakdown Structure





## INTRODUCTION

- 1 **LIST:** The **objectives** of Module 1.12 by writing them on a flipchart sheet. To save time you may prefer to have Flipchart Sheet #1 prepared in advance (or even laminate this one and others for duplicate use). Explain the objectives in detail.

**Objectives of this workshop: you will gain knowledge on –**

1. Types of projects arising from the AGM, benefits distribution, community projects etc.
2. Phases of a project: idea, plan, proposal, implementation, monitoring and reporting (termination)
3. Basic requirements and best practices of any project
4. A practical exercise in project or major activity management

- 2 **LIST:** The **competencies** of Module 1.12 by writing them on a flipchart sheet. To save time you may prefer to have Flipchart Sheet #2 prepared in advance.

**People who receive training in Module 1.12 will be able to:**

1. Show a basic understanding of project management
2. Describe the basic sequence and best practices of any project or major activity the conservancy implements
3. Demonstrate that they have planned a major conservancy activity, with management procedures developed

**EXPLAIN:** The competencies to the participants.


- 3 **ASK:** Do you have any questions about the objectives of the Module and the competencies you will gain?

- 4 **NOTE:** If participants are not familiar with project management, then you may wish to begin by explaining what this term means and why it is important in the context of a conservancy. Write this phrase (below) in large bold letters on a flipchart sheet and display throughout the workshop.


**Failing to plan is planning to fail**



**ASK: What do we mean by 'project management'?**

- 5**  Ask pairs of participants to consider this question, and then ask for pairs to present a quick definition while the rest of the group listen and comment. Write the first few pairs' contributions on the flipchart sheet under the title 'What is project management?' and then ask other pairs to add their contributions (also add to the flipchart sheet).
- 6** **EXPLAIN:** Project management is the discipline of planning, organising, securing and managing resources to bring about the successful completion of specific project goals and objectives.

**ASK: What kinds of projects might be managed by conservancies generally?**

- 7**  Ask pairs of participants to consider this question, and then ask for pairs to present quick suggestions while the rest of the group listen and comment. Write the first few pairs' contributions on the flipchart sheet under the title 'What projects do our conservancies manage?' and then ask other pairs to add their contributions (also add to the flipchart sheet). Then add any that may have been omitted. Your final list could look something like this:

- Campsite construction/renovation.
- Training of Tour Guides.
- Drilling borehole.
- Translocation of rhino.
- Benefit distribution.
- Human wildlife conflict mitigation, etc.

- 8** **EXPLAIN:** Projects aim to:
1. Achieve specific and measurable objectives.
  2. Be attainable.
  3. Utilise limited resources (money, people, equipment etc.) effectively and efficiently.
  4. Be time bound, i.e., have a clear starting and completion date with all objectives met in that time frame.
  5. Have an organisational home (e.g., the conservancy) but a single point of responsibility (i.e., the project manager).



**ASK: What are the factors that contribute towards the success of projects?**

**9** **DISTRIBUTE:** Handout #1.



Read out one factor at a time from Handout #1 and ask participants to supply an example or share experiences which support the item listed. Then read the next factor. Ask participants to think of any other factors that could be added to the list and discuss.

**10**

**SUMMARISE/LINK:** In this introductory session we have looked at our training objectives and the competencies we aim to acquire in the course of this workshop. We have also explored the concept of 'project management' and discussed the types of projects that conservancies undertake in Namibia, as well as the general aims of projects and the characteristics of successful ones.


In the first Topic of this training we are now going to look in more detail at different types of projects. Does anyone have any questions before we move on?




## TOPIC 1: Types of projects

- 1** **EXPLAIN:** No two projects are ever exactly alike: even a repeated project will differ from its predecessor in one or more commercial, administrative, and/or physical aspects. You will be working with different people, different infrastructure and budgets etc.

**ASK: What projects have been completed or are ongoing in your conservancy?**

- 2**  Ask participants to divide into groups (or 'conservancy groups' if a number of conservancies have representatives at the workshop) and distribute pre-cut cards and pens. Participants should list a few projects that have been implemented in their conservancies on a blank flipchart sheet (one per group).

Now ask the groups to identify the general elements that make these listed projects different from 'normal' day-to-day conservancy activities. Ask them to write the main differences on pre-cut cards. Each group will need to stick their cards on their flipchart sheet and discuss. 

**EXPLAIN:** (i.e., prompt if required). Here are some examples of how projects differ from day-to-day activities. They have: a start and end date; many stakeholders; outside funding; a project manager; beneficiaries, etc).

**NOTE:** For the purposes of this training, we will look at four different types of projects that we encounter in our work in conservancies.

- 3** **DISPLAY:** Prepared Flipchart Sheet #3, which you may prefer to laminate for duplicate use (or you can just write up the list on a flipchart sheet as you explain each type of project in turn, if you prefer.)

### Types of conservancy projects:

1. **Construction or renovation projects**
2. **Manufacturing projects**
3. **Management projects**
4. **Research projects**



**4** **EXPLAIN:** Let's start off by looking at the first category: **construction or renovation projects**. This could include the construction of lodges, conservancy offices, or campsites. These projects are often:

- Conducted on a site exposed to elements and often remote from the contractor's office.
- Require rigorous management, finance and quality control.
- Need extensive capital investment.
- Involve complicated organisation and communication.
- Engage specialist contractors.

**5** **EXPLAIN:** Let's now look at the second category: **manufacturing projects**. These projects could include the production of marula oil, crafts, etc., where a specific order has to be met within a specific amount of time according to tailored specifications. These projects often:

- Involve the production of a product to meet the demand of a single customer, or could lead to the development of a new product.
- Are conducted in a small-scale factory or other home-based environment, where supervision and management are often difficult.
- Require the supply of other components needed for production.
- Require specialised skills.

**6** **EXPLAIN:** Let's go on to look at the third category: **management projects**. These projects could include: preparing for a trade fair, Conservancy Committee training, or any other operation that involves the management and coordination of activities to produce an end result that is not identifiable principally as an item of hardware or construction. They could also include human wildlife conflict resolution and benefit distribution. These projects:

- Are not necessarily conducted for profit.
- Might not result in a visible or tangible creation.
- Are very important as their failure might result in operational breakdown.



7 **EXPLAIN:** Let's look now at the final category: **research projects**. These projects could result in new discoveries that might be quite profitable, but they also carry the highest risk because they are attempting to extend the boundaries of current knowledge. Annual game counts, assessment of the impact of tourism on local communities, and evaluation of the impact of crafts on rural livelihoods could be classified as research projects. These projects:

- Have objectives that are usually difficult or impossible to define.
- Can consume vast amounts of money and last for many months or years, but yield no practical results. For example, a research project on gender violence could take months but there are no tangible results except recommendations on how to mitigate gender violence.
- Are often restricted by budgets.

8  With a pen, divide a new flipchart sheet into quarters (see below) and give each quarter a heading: 'Construction and renovation projects'; 'Manufacturing projects'; 'Management projects' and 'Research projects'. Invite participant groups to sort their cards from the activity Step 2 into the four categories and then come to the flipchart sheet and stick them up in the correct quarter. Discuss their results.

<b>1. Construction/renovation projects</b>	<b>2. Manufacturing projects</b>
<b>3. Management projects</b>	<b>4. Research projects</b>

9 **SUMMARISE/LINK:** In Topic 1 we have looked at the different types of projects that a conservancy might undertake, and have investigated the characteristics of the four main types of projects that conservancies are involved in.

In Topic 2 we are going to examine together the different project phases.

Before we do that, let's just go back and look at our objectives for this workshop to confirm that we are 'on track' so far (refer back to the first flipchart sheet – or prepared Flipchart Sheet #1). Does anyone have any questions before we move on to the next topic?





## TOPIC 2: Phases of a project cycle

**Session 1: Introduction to the project cycle** (*approximately 25 minutes*).

**1** **EXPLAIN:** When preparing project plans, project designers can only estimate the time, money, team, quality, goals etc., needed to complete the project. This is the same as when a conservancy applies for a grant. It is thus essential to plan and take a project through various phases to complete the full project cycle successfully.

**ASK: What are the main steps or phases when planning and implementing projects?**

**2**  Give participants some pre-cut cards and ask them to think of answers to the above question. They should write down their ideas on separate cards that you should then invite them to come and stick up randomly on a flipchart sheet. **NB:** Make sure that participants do not stick up two identical cards, or two that are almost identical, essentially representing the same step in the cycle.

Once each card representing a step in the project cycle has been discussed, assist the participants to suggest how to sort the steps into the different phases of the project cycle. 

**3** **EXPLAIN:**

1. In the **initiation phase**, only an idea exists.
2. In the **definition phase**, the idea is refined according to requirements.
3. In the **design phase**, possible designs are examined and developed, providing even more clarity on how the design should be realised.
4. In the **implementation phase** the actual project itself is being carried out while achieving set objectives and results.
5. In the final phase, the **termination (evaluation) phase**, all the loose ends are tied together and the project will hopefully have achieved what it set out to achieve and a sustainability plan is in place. This is the phase where possible additional projects are discussed.



## 4 EXPLAIN:

- At each phase there may be a number of key activities, milestones and decisions which help us focus the project team and impose control.
- In a world of scarce resources, the selection of a suitable project has become more and more important. Organisations cannot afford for their financial and human resources to be tied up in projects which do not substantially contribute towards organisational outcome objectives.
- Projects usually involve uncertainty. At the beginning of a project, the exact amount of time that will be needed may not be defined, nor perhaps is the precise amount that the project will cost known. For some projects, it is even uncertain whether the intended goal will be reached at all.

### Session 2: Phases of the project cycle (approximately 90 minutes).

**EXPLAIN:** We will now look at the **five phases of the project cycle** in turn.

**DISTRIBUTE:** Handout #2 and refer to it as you discuss each phase of the project cycle.

**1 EXPLAIN:** First let's look together at the **initiation phase**. The initiation phase is the beginning of the project, when an idea is explored and elaborated on. Thought is also given to who will carry out the project, what parties are involved, and whether all those involved are in support of the project, e.g., translocation of mountain zebra in an area which is traditionally being used for grazing of cattle.

A proposal is written (by conservancy, NGO or funder) that contains a description of the proposed project. This proposal could also be business plans or grant applications. The prospective sponsors of the project evaluate the proposal and, upon approval, provide the necessary funding. The official start date of the project is when the contract is signed.

It is at this initiation phase where the decision is taken whether to go ahead with the project or not. This decision is based on whether the project is feasible and viable. We would look at market, financial, cultural, environmental, political, legal, resource and operational feasibility. Feasibility studies will be discussed further under Topic 3.

**DISTRIBUTE:** Handout #3 and explain that everybody has a different picture in their head of the project idea. It is very important to make sure that everybody has the same expectations. (Make a few copies of this Handout and laminate for future workshops.)





**NOTE:** Projects to which people keep adding objectives, and projects that keep expanding, are nearly certain to go off schedule, and they are unlikely to achieve their original goals.

**2 EXPLAIN:** Now let's discuss together the **definition phase**. After the project has been approved by all stakeholders and especially the funder, it enters the second phase. In this phase, the requirements that are associated with a project result are specified as clearly as possible. This involves identifying the expectations that all the involved parties have with regard to the project result.


**NOTE:** At the end of the definition phase, a list of definitive requirements is developed and presented for the approval of all the project's decision makers. All agreements between the funders and the project team have been established. No new requirements can be added after this phase.

**DISPLAY:** Prepared Flipchart Sheet #4, which you may prefer to laminate for duplicate use (or you can just write up the details on a flipchart sheet as you explain each project requirement in turn, if you prefer.)

### Project requirements

- 1. The project has to adhere to certain conditions, e.g., legislation; leaseholds; working condition regulations etc. These requirements cannot be influenced from within the project.**
- 2. The quality of the project result cannot be changed, e.g., how many animals trans-located; number of stands at campsite; minimum depth of borehole etc.**
- 3. To cut costs, we are encouraged to spend proportionally more time and effort during the initial phases to get the design right before we start to implement.**

**ASK:** Participants to think about their experiences in drafting grant applications, project proposals or business plans.

 Pose the questions below to the participants and ask them to answer verbally. Discuss each answer to emphasise how important it is that the conservancy is involved right from the onset and remains a major stakeholder throughout the project cycle.

- Who came up with the idea of funding various projects in your conservancy? (The donor, the NGO, the conservancy, an entrepreneur within the conservancy or other?)
- Who compiled the project proposal or grant application?



- Were you involved right from the beginning in planning the project and right through project implementation?
- Did you fully understand what role the conservancy was playing in the implementation of the project?
- Were you clear on the costs to the conservancy in managing the result of the project once completed, e.g., staff, maintenance, fuel for pump, etc?
- Did you report on the progress of the project or was it all done outside the conservancy and according to the specifications of the donor?

**3** **EXPLAIN:** Now let's look together at the **design phase**. This is when the project is designed and developed in detail, together with all the associated planning of schedules, procurement, resources and budgets. This is the phase where leasehold would be applied for (if applicable) or land is bought.

**4** **EXPLAIN:** The next stage in the project cycle is the **implementation phase**. In other words, the actual project is now implemented: staff members are hired; equipment and vehicles procured; funds transferred; contracts awarded etc. This phase accounts for the greatest level of effort (LOE), where the majority of expenses are incurred.

A **budget is made for the entire project** and each phase (or parts of phases) is funded in tranches. Rarely are all the funds released in one go. When reaching the implementation phase, a detailed budget for implementation has to be known.

**5** **EXPLAIN:** The very last stage of the project cycle is the **termination phase**, when the actual project has come to an end. Various names are given to this phase including 'terminal' or 'end-of-project evaluation', 'handover', etc. This is the stage when we assess whether the project achieved what it set out to do, i.e., met all the outcomes. Especially with donor-funded projects, an outside team will evaluate the project and submit a report to the donor as well as the beneficiaries.

The evaluation of a project is important because it is an opportunity for the project implementers to learn from the entire project cycle. An evaluation does not only focus on what went wrong, but there is a strong emphasis on what went right. Positive lessons learnt can be taken forwards to other projects. The same goes for the things that did not go according to plan, as they would allow us to change the way that future projects are planned and implemented.

**6** **SUMMARISE/LINK:** In Topic 2 we worked together to find out how the different steps or stages of a project fitted into a project cycle and we then discussed the five main phases in a project cycle.



In Topic 3 we are going to examine together the basic requirements for any project, and project best practices. Before we do that, let's just go back and look at our objectives for this workshop to confirm that we remain 'on track' (*refer back to the first flipchart sheet – or prepared Flipchart Sheet #1*). Does anyone have any questions before we move on to the next topic?



## TOPIC 3: Basic requirements and best practices of any project

### Session 1: Introduction: the project scope (*approximately 30 minutes*).

**1** **EXPLAIN:** Projects are nothing new. Just think of the local school or clinic or power lines to your village. Projects in our industrialised world – with competition between rival companies and also the greater regard for the value and wellbeing of working people – have all led to the development of new ideas and techniques for managing projects.

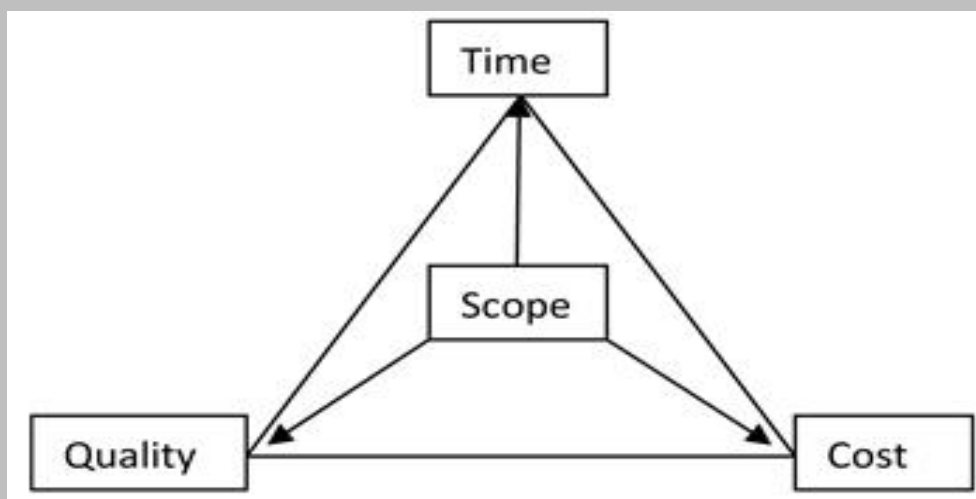
**All projects are sets of coordinated activities aimed at achieving new and tangible objectives within a specified time.** There is a constant element of risk and uncertainty, and the tasks and events leading to completion can never be predicted with absolute certainty. Projects carried out with social organisations (e.g., conservancies) always involve at least some element of politics, too. To make projects successful, project leaders in this situation would be wise to involve the relevant local authorities.

A project has a specific start and end point, and is set up to meet specific objectives and to create a specific result, product or service.

**2** **DRAW:** The diagram below on a flipchart sheet and explain the scope of a project. **The scope defines the purpose of the project** by outlining what the project should achieve together with what should be included in the project and – just as importantly – what should be excluded from the project.

#### Scope - time, cost and quality

Projects need to be controlled in order to meet their objectives and deliver benefits. Objectives are defined in terms of expectations of time, cost and quality.



- 3** **EXPLAIN:** Now that you can see that there are three components of the project scope, we will look together throughout the rest of this Topic 3 at how to manage these three components, i.e. time, money and quality.
- The **Project Scope Management Plan** explains how the project scope will be defined, managed, controlled, verified and communicated to the project team and stakeholders. It also includes all work required to complete the project.
  - The documents are used to control what is in (and out) of the scope of the project. Items deemed out of scope go directly through the change control process and are not automatically added to the project work items.
  - The Project Scope Management Plan is included as one of the sections in the overall Project Management Plan. It can be very detailed and formal, or loosely framed and informal – depending on the communication needs of the project.

## Session 2: Project objectives (*approximately 15 minutes*).

- 1** **EXPLAIN:** Projects aim to achieve specific and measurable objectives. Project objectives are normally defined in such a way as to effect visible changes in the condition of the client or the organisation itself, e.g., increasing income, staff training, setting up financial systems, or building water points. Objectives can be formulated as ‘outcome objectives’ or ‘output objectives’ and must be measurable – otherwise they are not proper objectives.

Objectives relate to specific results that can be achieved from project activities and that can be evaluated accurately (by means of measurements). ‘One lodge built by the end of the year’ is an example of an output objective, so is ‘the building of the lodge will increase conservancy income by 50 percent’. Another example is: ‘To train four CC members in project cycle management’.

- 2** **DISPLAY:** Prepared Flipchart Sheet #5, which you may prefer to laminate for duplicate use (or you can just write up the text below on a flipchart sheet as you explain each part of the acronym in turn, if you prefer.)

Output objectives need to be **SMART:**

<b>S</b> pecific:	Are things quantifiable and testable wherever possible?
<b>M</b> easurable:	Are things genuinely within your control (or at least open to influence by you)?
<b>A</b> ttainable:	Are you realistic about the scale of what can be achieved?
<b>R</b> esourced:	Have you taken the resource implications of what is being proposed into account and are the resources available?
<b>T</b> ime bound:	Is it clear by when the objectives have to be achieved?



### Session 3: The Logical Framework and the Feasibility Study (approximately 45 minutes).

**1** **EXPLAIN:** When we work with international development projects, they would normally require a conservancy to include the **Logical Framework (LFW)** – a management tool mainly used in the design, monitoring and evaluation of projects. Four different types of events that take place as a project is implemented are established: the **project activities, outputs, purpose** and **goal**. Under each of these headings you would therefore write down more information in the LFW.

- The Logical Framework is usually developed during a stakeholder meeting to ensure buy-in from all parties, as it is a means of articulating a common interpretation of the objectives of a project and how they will be achieved. For the sake of this training, you just need to know what a Logical Framework is. A conservancy would be unlikely to develop its own and should really always call in the help of a consultant.
- The Logical Framework is also used to develop activity and resource schedules. Although we will not be looking here at how to develop a LFW, you will learn later how to develop activity and resource schedules, which are essential in planning and managing projects.

**2** **EXPLAIN:** Ideas, needs and problems crystallise into projects in different ways. However, whichever way your projects develop there should at some point be a **Feasibility Study** – to not only ensure the project is feasible, but also ensure it is making the best use of resources. The best time to do the feasibility study is during the inception or planning phase of the project cycle.

**NOTE:** To answer the following question: ‘Should we go ahead with this project?’ we need to conduct a feasibility study. In the past, conservancies have sometimes omitted to do feasibility studies and ended up with the wrong product in the wrong location.

- Private sector joint venture investors usually conduct their own feasibility studies to ensure that the proposed product meets tourist industry needs. This also applies when planning a capacity-building project, where the conservancy should do a training needs assessment, or when planning to build a craft market or drill a borehole – where we would do an environmental impact assessment (EIA) and/or draft a Business Plan, which would contain information on feasibility.
- It is critical to know what is already in place and assess the gaps before proposing a project. Do proper research and consult tourism options plans if they exist for your area/conservancy. Otherwise do proper needs assessment and market research.




- If the conservancy's proposed project could have any impact on the environment (e.g., use hardwood for carvings, divert water for a fish farm, create new access roads or sewerage and refuse disposal from a large lodge) you would need to conduct an **environmental impact assessment**, which also needs approval from the line ministries.
- It would also be necessary to draft a Business Plan, which would include a marketing strategy.

**NOTE:** The topics of environmental impact assessment and business plans are covered in great detail under Modules 2.1 (Joint Venture Tourism Development) and 2.2 (Tourism Enterprises and Products).

#### **Session 4: The Work Breakdown Structure (WBS) and the Activity Schedule** (*approximately 45 minutes*).

**1** **EXPLAIN:** You may find that organising an AGM, for example, involves a whole range of very specific and mundane activities (such as inviting people, finding and booking a venue, planning the agenda and so on). We should start planning at a fairly general level and focus on the key objectives (outcome and output) of the whole activity. The **general activity** would be to book a venue, for example, and the **specific activity** would be to hire chairs, transport chairs, clean the venue, etc. The same goes for project management. **It is important to first think of all the activities and then create clusters of activities in order to ensure a comprehensive list of objectives and activities.** Clustering involves finding the appropriate general and specific activities.

**2** **DISTRIBUTE:** Handout #4 and ask participants to divide into groups so that each group has at least one person from a conservancy that already has a community campsite, if possible.

 Ask groups to look at the general activities identified when building a community campsite. Ask them what other general activities could be included (e.g., marketing of campsite; water/electricity supply, etc). Now ask groups to write on pre-cut cards the various **specific activities that need to be done to achieve the general activities**. (Allocate one general activity per group if there are many workshop participants, otherwise each group can write down specific activities for all general activities identified.)

**NB:** If necessary, prompt participants with the following suggestions:

- Draft tender document to hire contractor.
- Calculate cost of materials (plumbing supplies, transport etc.).
- Draw map and establish borders of campsite.



Stick up all the cards containing suggestions for specific activities for the first general activity on a flipchart sheet at random. Now ask a participant to put the specific activities in the most logical order in which they should take place and discuss his/her ordering together until the most logical sequencing has been reached. Repeat for the other general activities. Everybody can now complete Handout #4 by copying from the flipchart sheet (and they should put the completed Handout #4 into their training files).



**3** **EXPLAIN:** Building a community campsite is a fairly general activity consisting, on a more specific level, of other activities that in turn consist of other even more detailed and specific activities. When we become too specific, the project plan may become too complex and we will lose direction in this complexity. If it is too general, on the other hand, we may exclude some important activities.

**4** **EXPLAIN:** An **Activity Schedule** is a framework that shows what general activity is planned, when, who will be doing it, and at what cost, and is the main feature of the project plan. Donor organisations might give it different names and also have it structured differently, but for our purposes we will use a template that is useful for us in managing and implementing projects. This Activity Schedule could also be used when doing smaller conservancy projects that we fund ourselves, e.g., holding an AGM.

**DISTRIBUTE:** Handout #5 and discuss this together.

**Session 5: Project costs, the Action Plan and monitoring** (approximately 75 minutes).

**1** **EXPLAIN:** **A good estimate of project costs is necessary for subsequent management decisions and control.** The most obvious reason for producing cost estimates is to assist in telling us how much everything will cost, which in turn will tell us what can be included in the project and what not.

When planning a project there are many different kinds of direct costs, e.g., labour costs, material costs etc., but we also have indirect costs, fixed costs, prime costs, etc.

Calculating costs usually involves very detailed spreadsheets, but for our purposes we will look at a simplified version that we can use when planning any conservancy activity (for example an AGM, or for more large-scale projects). We usually operate within financial limits, and planning each expense ensures that funds are allocated properly for each activity.

**2** **DISTRIBUTE:** Handout #6. Go through the information with participants and explain content where necessary. Use an additional practical example if you have the time.

**NOTE:** When a project takes longer than half a year or so, you would have to add an amount for 'contingencies', i.e., to pay for unforeseen expenses and specifically to have the funds for increases in prices due to inflation.





### 3 **DISTRIBUTE:** Handout #7 and discuss together.

**EXPLAIN:** Project plans can be very complicated. Even activity schedules can be very detailed and contain vast amounts of information. **An Action Plan is a useful tool to plan specific activities for the conservancy on a monthly basis.** Conservancies should complete an Action Plan at every meeting and refer to the last one to check what has been done and what still needs to be done (and also why it has not been done).

4 **EXPLAIN: Project monitoring is the regular review of a project's progress during its implementation.** Using the project activity schedule to monitor progress of a project simply means comparing the planned set of activities with the activities that have actually taken place. The monitoring should consider whether:

- The activities are being completed within the agreed time period.
- The activities are being completed by the planned person.
- The activities are being completed within the planned budget and according to the planned quality/standards.

### **Session 6: The Project Proposal Outline** (*approximately 15 minutes*).

1 **EXPLAIN:** It is most unlikely that a conservancy would be expected to draw up a **project proposal** without some kind of assistance from an NGO or other support partner. Nevertheless, it is useful for us to look together now at the key components of such a proposal as they will reinforce a great deal of the material that we have just covered in Topic 3, as well as provide a sort of summarisation of the main aspects of any proposed project.

**DISTRIBUTE:** Handout #8 and explain that this is a **basic format of a project proposal** that can be adapted for specific conservancy projects. Time permitting, read through the various headings and discuss with the participants.

2 **SUMMARISE/LINK:** In Topic 3 we have identified and discussed the key project requirements and aspects of best practice that a conservancy should follow.

In the final Topic, we are going to work through an exercise in project (or major activity) management. Before we do that, let's just go back and look at our objectives for this workshop to confirm that we remain 'on track' in the final stages of our training (*refer back to the first flipchart sheet – or prepared Flipchart Sheet #1*). Does anyone have any questions before we move on to the last topic?



## TOPIC 4: Practical exercise in project (or major activity) management

**1** **EXPLAIN:** In the previous topics you were given some detailed (and some not so detailed) information on project cycle management. We will now do a few more exercises to understand the process better and also to be clear on how projects work and what role we need to play in the process.

**2** *Ask participants to divide into groups and give each some pre-cut pieces of card and some pens. Explain that each group is to select only one of the following projects (ensure that not all groups choose the same project):*

- a. Trans-locate 30 zebra from Etosha to your conservancy.
- b. Develop an elephant water point in your conservancy.
- c. Build a meat-processing plant in your conservancy.
- d. Supply electricity, and electrify the craft centre at your conservancy.

**EXPLAIN:** In the last Topic, we identified the general and specific activities that need to be completed when constructing a campsite. We are now going to do an activity in which you **plan the general activities for your selected imaginary conservancy project.**

**REFER:** Participants to Handout #5 (the Activity Schedule template); each group should have a copy, in addition to the participants themselves having one.

**3** *Ask each group to write the title of their project (as selected from the above list) into the top row of their blank Handout #5 and then write down no more than **five general activities** for implementing this project. Activities should be listed in the order that they must be undertaken. **NB:** Responses should be planned on paper and on the cards provided **FIRST**. Groups should take their time to get the order in which activities should take place correct, and only once they are happy with the ordering should they write it out on their Handout #5.*


**4** *Participants should now work in their groups to draft a **project matrix on their Activity Schedule template**, which will show the following:*

- What activity (do not forget to include meetings and training in your activities).
- When: implementation date of activity.




- Who: person responsible.
- Cost: all resources needed (also staff, conservancy vehicle, electricity, etc.).
- Other: any additional information

**NB:** This activity will take some time.

**5**  Each group should now copy the contents of their completed Activity Schedule onto a flipchart sheet, once they have all agreed on the information it should contain, and the ordering. Now ask each group to present their Activity Schedule in turn. Discuss as a group.

**ASK:** Is there a project you are planning for your conservancy?

**6**  Prepare for this task by dividing participants into 'conservancy groups' and ask each group to think of one project that they want to implement in their conservancy soon. Refer to Handout #8 and assist conservancy groups to follow each step in roughly drafting preliminary text for a full project proposal. Participants should only make lists and bullet points for now, instead of writing long paragraphs.

**EXPLAIN:** Complete this activity when you return to your conservancy, with the aim of ending up with a full project proposal after consultation with relevant stakeholders.

**NOTE:** Many projects can be funded by the conservancy with their own funds and resources; others might need donor/grant funds or bank loans. Conservancies do not need to put projects on hold that they can fund themselves.

**7** **SUMMARISE/LINK:** In Topic 4 we have carried out a detailed exercise that enabled us to plan and schedule the general activities necessary to implement an imaginary project, and decide upon the final sequencing of these activities.

We are now going to carry out a short and informal final self-assessment activity. Before we do that, let's just go back and look at our objectives for this workshop to confirm that we have completed our training (*refer back to the first flipchart sheet – or prepared Flipchart Sheet #1*). Does anyone have any questions before we do the self-assessment activity?



## **SELF-ASSESSMENT: Assessing participants' understanding of this Module**

Handout #9 comprises a set of questions based on this Module and designed to evaluate the knowledge and skills that participants receiving this training have acquired. It is not intended as a formal test but is meant to help participants assess areas where they have sound knowledge and strong skills, and areas that require further work.

You can either use the questions as the basis of a plenary session with all the participants or – if more suitable – ask them to write their answers out on some paper that you will provide for the purpose.

Although it will help you personally to modify your training approaches should you be able to discuss their answers with participants, they should not feel compelled to share their responses with you. If they are willing to share their responses, either collectively or individually, then use the information that you gather to assess your own training skills. Also note from participants' responses where these printed training materials might require amendment, for example, if an activity or section of the text is proving problematic.



## List of Handouts that you should make available for this Module

MODULE 1.12, HANDOUT #1: Factors contributing to the success of projects

MODULE 1.12, HANDOUT #2: The five phases of the project cycle

MODULE 1.12, HANDOUT #3: Expectations of a project

MODULE 1.12, HANDOUT #4: Work Breakdown Structure (WBS) – levels of activities

MODULE 1.12, HANDOUT #5: Activity Schedule template

MODULE 1.12, HANDOUT #6: Costing activities

MODULE 1.12, HANDOUT #7: Action Plan

MODULE 1.12, HANDOUT #8: Basic format of a project proposal

MODULE 1.12, HANDOUT #9: *Self-assessment evaluation for participants*

All Handouts are one page only. Please make sure that you make enough copies for each trainee.





## NOTES





