PROJECT MANAGEMENT FOR DEVELOPMENT ORGANIZATIONS



# PROJECT MANAGEMENT FOR DEVELOPMENT ORGANIZATIONS

A methodology to manage development projects for international humanitarian assistance and relief organizations

#### © PM4DEV 2015

Our eBook is provided free of charge on the condition that it is not copied, modified, published, sold, re-branded, hired out or otherwise distributed for commercial purposes. Please give appropriate citation credit to the authors and to PM4DEV.

Feel free to distribute this eBook to any one you like, including peers, managers and organizations to assist in their project management activities.

# GLOSSARY OF TERMS

**Acceptance** The formal process of accepting delivery of a product or

deliverable.

**Acceptance Criteria** Performance requirements and essential conditions that

have to be achieved before project deliverables are

accepted.

**Accountability** The obligation to report on one's actions.

**Activity** Actions taken or work performed through which inputs,

such as funds, technical assistance and other types of resources are mobilized to produce specific outputs.

**Activity Duration** Activity duration specifies the length of time (hours, days,

weeks, months) that it takes to complete an activity. This information is optional in the data entry of an activity.

**Actual Dates** Actual dates are entered as the project progresses. These

are the dates that activities really started and finished as

opposed to planned or projected dates.

**Actuals** The cost or effort incurred in the performance of tasks.

Also, the dates tasks have been started or completed and

the dates milestones have been reached.

**Alternatives** A number of different solutions and approaches that must

be evaluated and chosen to attain the objectives of a

project.

**Analogous Estimating** Estimating using similar projects or activities as a basis for

determining the effort, cost and/or duration of a current

one. Usually used in Top-down Estimating.

**Approach Statement** A high-level description of how the project will accomplish

its goals and objectives.

**Assumption** Something taken as true without proof. In planning,

assumptions regarding staffing, complexity, learning curves and many other factors are made to create plan scenarios.

These provide the basis for estimating. Remember,

assumptions are not facts. Make alternative assumptions to

get a sense of what might happen in your project.

**Authority** The ability to get other people to act based on your

decisions. Authority is generally based on the perception that a person has been officially empowered to issue

binding orders. See Power.

**Award Agreement** An agreement made between an NGO and the project

donor. Award Agreements may also be called grant

agreements, cooperative award agreements,

**Balanced Scorecard** A management and measurement system that enable

organizations to clarify their vision and strategy, and translate them into action. It provides feedback for both the

internal business processes and external outcomes in order to continuously improve strategic performance and results.

**Baseline** A point of reference. The plan used as the comparison point

for project control reporting. There are three baselines in a project—schedule baseline, cost baseline and product (scope) baseline. The combination of these is referred to as

the performance measurement baseline.

**Baseline Schedule** The baseline schedule is a fixed project schedule. It is the

standard by which project performance is measured. The current schedule is copied into the baseline schedule which remains frozen until it is reset. Resetting the baseline is done when the scope of the project has been changed significantly. At that point, the original or current baseline becomes invalid and should not be compared with the

current schedule.

**Baseline Survey** Information on the pre-project status of project participant

conditions against which Performance Indicators will be compared at midterm and at the end of the project.

**Beneficiary**The person or organization that is the principle beneficiary

of the project. Generally the beneficiary has a significant authority regarding the acceptance of the project outputs

**Benefits Management** Benefits management is the identification of the benefits at

an organizational level and the monitoring and realization

of those benefits.

**Best Practice** Something that we have learned from experience on a

number of similar

projects around the world. This requires looking at a

number of "lessons- learned" from

projects in the same field and noticing a trend that seems

to be true for all projects in that

field.

**Bottom-up Estimating** Approximating the size (duration and cost) and risk of a

project (or phase) by breaking it down into activities, tasks and sub-tasks, estimating the effort, duration and cost of

each and rolling them up to determine the full estimate. Determining duration through a bottom-up approach requires sequencing and resource leveling to be done as

part of the scheduling process.

**Budget** The amount allotted for the project that represents the

estimate of planned expenditures and income. The budget may be expressed in terms of money or resource units

(effort).

**Budgeting and cost** 

management

Budgeting and cost management are the estimating of costs and the setting of an agreed budget, and the management of actual and forecast costs against that

budget.

**Calendar Date** A specific date shown on the calendar (e.g., July 3, 1942)

as opposed to a relative date. See Relative Dates.

**Capacity Assessment** Analysis to measure the ability of the project, partners, and

the community to implement a particular Project Strategy

and related Activities.

**Change** Difference in an expected value or event. The most

significant changes in project management are related to scope definition, availability of resources, schedule and

budget.

**Change control** Change control is the process that ensures that all changes

made to a project's baseline scope, time, cost and quality objectives or agreed benefits are identified, evaluated,

approved, rejected or deferred.

**Change Request** A documented request for a change in scope or other

aspects of the plan.

**Charter** A formal document providing authority to a project

manager to conduct a project within scope, quality, time,

cost, and resource constraints as laid down in the

document.

**Closing** The process of gaining formal acceptance of the results of a

project or phase and bringing it to an orderly end, including

the archiving of project information and post-project

review.

**Communication** Communication is the giving, receiving, processing and

interpretation of information. Information can be conveyed

verbally, non-verbally, actively, passively, formally,

informally, consciously or unconsciously.

**Concept** Concept is the first phase of the project life cycle. During

this phase the need, opportunity or problem is confirmed, the overall feasibility of the project is considered and a preferred solution identified. The business case for the

project will be produced in this phase.

**Conflict management** Conflict management is the process of identifying and

addressing differences. Effective conflict management prevents differences becoming destructive elements in a

project.

**Consensus**Unanimous agreement among the decision-makers that

everyone can at least live with the decision (or solution). To live with the decision, one has to be convinced that the decision will adequately achieve objectives. As long as someone believes that the decision will not achieve the

objectives, there is no consensus.

**Constraint** A condition or occurrence that might restrict, limit, or

regulate the project. Generally constraints are outside the control of the project team. For example, a target date may be a constraint on schedule. A schedule may be constrained

by resource limitations.

**Contingencies** Planned actions for minimizing the damage caused by a

problem, in the event that a problem should occur.

**Contingency Reserve** A designated amount of time and/or budget to account for

parts of the project that cannot be fully predicted. For example, it is relatively certain that there will be some rework, but the amount of rework and where it will occur in the project (or phase) are not known. These are sometimes called "known unknowns". The purpose of the contingency reserve is to provide a more accurate sense of the expected completion date and cost of the project (or phase). Some PMs separate contingency reserves from management reserves while others combine the two into a single reserve. Reserves for changes and issues may be part of

the contingency reserve or separate reserves.

**Control** Control is the process of comparing actual performance

with planned performance, analyzing the differences, and

taking the appropriate corrective action

**Critical Activity** A critical activity has zero or negative float. This activity

has no allowance for work slippage. It must be finished on

time or the whole project will fall behind schedule

**Critical Path** The path(s) in a project network that has the longest

duration. This represents the series of activities that determines the earliest completion of the project. There may be more than one critical path and the critical path(s)

may change during the project.

**Deliverable**Any measurable, tangible or intangible, verifiable item that

that must be produced to complete a process, phase, or

project.

**Dependency** A relationship between two or more tasks. A dependency

may be logical (see Logical Relationship) or resource based.

**Detailed Implementation** 

Plan

A set of updated schedules, plans, targets and systems that have sufficient detail to permit the smooth and effective project implementation. It is completed after a project

proposal is approved and funded and before

implementation begins.

**Development Goals** 

The underlying basis for which a project is undertaken

**Dialogue** 

A discussion in which the participants share their thoughts and gain a better understanding of the subject and, possibly, reach consensus. This is contrasted with debate.

Duration

The length of time required or planned for the execution of a project activity. Measured in calendar time units—days, weeks, months.

**Early Finish** 

The Early Finish date is defined as the earliest calculated date on which an activity can end. It is based on the activity's Early Start which depends on the finish of predecessor activities and the activity duration.

**Early Start** 

The earliest time a task can begin. The time at which all the tasks' predecessors have been completed and its resources are planned to be available.

Earned value management

Earned value management (EVM) is a project control process based on a structured approach to planning, cost collection and performance measurement. It facilitates the integration of project scope, time and cost objectives and the establishment of a baseline plan for performance measurement.

**Effort** 

The amount of human resource time required to perform an activity. Measured in terms of person hours, person days, etc.

**Elapsed Time** 

Elapsed time is the total number of calendar days (excluding non-work days such as weekends or holidays) that is needed to complete an activity

**Estimate** 

An assessment of the required duration, effort and/or cost to complete a task or project. Since estimates are not actual, they should always be expressed with some indication of the degree of accuracy.

**Estimate to Completion** 

The expected effort, cost and/or duration to complete a project or any part of a project. It may be made at any point in the project's life.

**Estimating** 

Estimating uses a range of tools and techniques to produce estimates. An estimate is an approximation of project time and cost targets that is refined throughout the project life cycle.

**Evaluation** A periodic, systematic assessment of a project's relevance,

efficiency, effectiveness and impact on a defined

population. Evaluation draws from data collected during monitoring, as well as data from additional surveys or studies to assess project achievements against set

objectives.

**Evidence-based** 

Reporting

An approach to report writing in which statements made about the progress of the project are supported with

verifiable information.

**Executing** The process of coordinating the people and other resources

in the performance of the project or the actual performance

of the project.

**Exposure** The likely loss or consequence of a risk. It is the combined

probability and impact of a risk usually expressed as the

product or probability x impact.

**Feasibility Study** A study to examine the viability of taking on a project.

**Finish Float** Finish float is the amount of excess time an activity has at

its finish before a successor activity must start.

**Finish-To-Finish Lag**The finish-to-finish lag is the minimum amount of time that

must pass between the finish of one activity and the finish

of its successor (s).

**Finish-To-Start Lag**The finish-to-start lag is the minimum amount of time that

must pass between the finish of one activity and the start

of its successor(s).

**Fiscal Year** The 12-month period of July 1 to June 30 used for financial

planning and reporting purposes.

**Float** The amount of time available for a task to slip before it

results in a delay of the project end date. It is the difference between the task's early and late start dates.

**Free Float** Free float is the excess time available before the start of

the next activity, assuming that both activities start on

their early start date

**Gantt Chart** A bar chart that depicts a schedule of activities and

milestones. Generally activities (which may be projects, operational activities, project activities, tasks, etc.) are listed along the left side of the chart and the time line along the top or bottom. The activities are shown as horizontal bars of a length equivalent to the duration of the activity.

Gantt Charts may be annotated with dependency relationships and other schedule-related information.

**Goal** The higher-order objective to which a development

intervention is intended to contribute.

**Goal Statement** A high-level statement of the project's object of study, its

purpose, its quality focus, and viewpoint. Should reference the project's benefits in terms of improved social or

economic conditions.

**Governance** The planning, influencing and conducting of the policy and

affairs of the project.

**Governance Model** The agreed upon processes, roles and responsibilities for

governing the progress and direction of a project.

Governance of project

management

Governance of project management (GoPM) concerns those areas of corporate governance that are specifically related to project activities. Effective governance of project

management ensures that an organization's project portfolio is aligned to the organization's objectives, is

delivered efficiently and is sustainable.

**Grant** Grants are funds given to tax-exempt nonprofit

organizations or local governments by foundations, corporations, governments, small businesses and

individuals. Most grants are made to fund a specific project and require some level of reporting. The process involves an applicant submitting a proposal to a potential funder, either on the applicant's own initiative or in response to a

Request for Proposals from the funder.

**Histogram** A histogram is a graphic display of resource usage over a

period of time. It allows the detection of overused or underused resources. The resource usage is displayed in

colored vertical bars.

Human resource

management

Human resource management (HRM) is the understanding and application of the policy and procedures that directly

affect the people working within the project team and working group. These policies include recruitment, retention, reward, personal development, training and

career development.

**Impact** Positive and negative long-term effects on identifiable

population groups produced by a development intervention, directly or indirectly, intended or unintended. These effects

can be economical, socio-cultural, institutional, environmental, technological or of other types.

**Implementation** Implementation is the third phase of the project life cycle,

during which the project management plan (PMP) is executed, monitored and controlled. In this phase the design is finalized and used to build the deliverables.

**Incremental Delivery** A project life cycle strategy used to reduce the risk of

project failure by dividing projects into more manageable pieces. The resulting sub-projects may deliver parts of the full product, or product versions. These will be enhanced to

increase functionality or improve product quality in

subsequent sub-projects.

Information management and reporting

Information management is the collection, storage, dissemination, archiving and appropriate destruction of project information. Information reporting takes

information and presents it in an appropriate format which includes the formal communication of project information to

stakeholders.

Initiating (Project)

The process of describing and deciding to begin a project (or phase) and authorizing the Project Manager to expend resources, effort and money for those that are initiated.

**Inputs** 

The financial, human, material, technological and information resources used for the development

intervention.

**Issue management** 

Issue management is the process by which concerns that threaten the project objectives and cannot be resolved by the project manager are identified and addressed to remove the threats they pose.

**Kick-Off Meeting** 

A meeting at the beginning of the project or at the beginning of a major phase of the project to start officially the project and help the team have an understanding of objectives, procedures and plans.

Lag

Lag is the time delay between the start or finish of an activity and the start or finish of its successor(s)..

**Late Finish** 

Late Finish dates are defined as the latest dates by which an activity can finish to avoid causing delays in the project. Many PM software packages calculate late dates with a backward pass from the end of the project to the beginning.

**Late Start** 

The latest time a task can start before it causes a delay in the project end date.

Leadership

Leadership is the ability to establish vision and direction, to influence and align others towards a common purpose, and to empower and inspire people to achieve project success. It enables the project to proceed in an environment of change and uncertainty.

Learning and development

Learning and development involve the continual improvement of competencies in the organization. The identification and application of learning within projects develop the organization's capability to undertake current and future projects.

Legal awareness

Legal awareness provides project management professionals with an understanding of the relevant legal duties, rights and processes that should be applied to projects.

**Lessons Learned** A set of statements captured after completion of a project

or a portion of a project. The statements describe in a neutral way what did or did not work well, along with a statement regarding the risk of ignoring the lesson. Capturing and sharing the lessons learned is an important

part of process improvement.

**Link** A relationship between two or more tasks. See Logical

Relationship.

**Log Frame** A management tool used to improve the design of

interventions, most often at the project level. It involves identifying strategic elements (inputs, outputs, outcomes and impact) and their causal relationships, indicators, and the assumptions and risks that may influence success and

failure. It thus facilitates planning, execution and evaluation of a development intervention.

**Logical Relationship** A dependency relationship between two or more tasks or

between tasks and milestones, such that one cannot start

or finish before another has started or finished.

**Management Reserve** A designated amount of time and/or budget to account for

parts of the project that cannot be predicted. These are sometimes called "unknown unknowns." For example, major disruptions in the project caused by serious weather conditions, accidents, etc. Use of the management reserve generally requires a baseline change. See Contingency

Reserve.

**Matrix Organization** A business structure in which people are assigned to both a

functional group (departments, disciplines, etc.) and to projects or processes which cut across the organization and

require resources from multiple functional groups.

**Methods and procedures** Methods and procedures detail the standard practices to be

used for managing projects throughout a life cycle. The methods provide a consistent framework within which project management is performed. Procedures cover individual aspects of project management practice and form

an integral part of a method.

**Metrics** Metrics are quantitative measures such as the number of

project activities completed on time. They are used in improvement programs to determine if improvement has taken place or to determine if goals and objectives are met.

**Milestone** A point in time when a deliverable or set of deliverables is

available. Generally used to denote a significant event such as the completion of a phase of the project or of a set of critical activities. A milestone is an event; it has no duration or effort. It must be preceded by one or more tasks (even the beginning of a project is preceded by a set of tasks,

which may be implied).

**Mitigation** Actions taken to eliminate or reduce risk by reducing the

probability and or impact of occurrence.

**Mitigation Strategies** Identification of the steps that can be taken to lessen the

risk by lowering the probability of a risk event's occurrence,

or to reduce its effect should the risk event occur.

**Monitoring** The process of monitoring, measuring and reporting on

progress and taking corrective action to ensure project

objectives are met.

**Negative Float**Negative float indicates activities must start before their

predecessors finish in order to meet a Target Finish date. All float is calculated when a project has its schedule computed. Negative float occurs when the difference between the late dates and the early dates (start or finish) of an activity are negative. In this situation, the late dates are earlier than the early dates. This can happen when the constraints (Activity Target dates or a Project Target Finish

date) are added to a project.

**Negotiation** Negotiation is a search for agreement, seeking acceptance,

consensus and alignment of views. Negotiation in a project can take place on an informal basis throughout the project life cycle or on a formal basis such as during procurement,

and between signatories to a contract.

**Network Analysis** Network analysis is the process of identifying early and late

start and finish dates for project activities. This is done with

a forward and backward pass through the project.

**Network Diagram** A graphic tool for depicting the sequence and relationships

between tasks in a project. PERT Diagram, Critical Path Diagram, Arrow Diagram, Precedence Diagram, are all

forms of network diagrams.

**NGO** A non-governmental organization is a non-profit

organization that often conducts humanitarian and

development work around the world.

**Objective** An objective is something to be achieved. In project

management, the objectives are the desired outcomes of the project or any part of the project, both in terms of concrete deliverables and behavioral outcomes (e.g.,

improved service, more income, etc.).

**Organization Structure** The organization structure is the organizational

environment within which the project takes place. The organization structure defines the reporting and decision making hierarchy of an organization and how project

management operates within it.

**Organizational roles** Organizational roles are the roles performed by individuals

or groups in a project. Both roles and responsibilities within projects must be defined to address the transient and

unique nature of projects and to ensure that clear

accountabilities can be assigned.

**Organizational Culture** The behavior and unspoken rules shared by people and

groups in an organization. It is organically developed over time and may differ from ideal organizational values.

time and may differ from ideal organizational values.

**Outcome** The intended or achieved short-term and medium-term

effects of an intervention's output, usually requiring the collective effort of partners. Outcomes represent changes in development conditions which occur between the completion of outputs and the achievement of impact.

**Outputs** The products and services which result from the completion

of activities within a development intervention.

**Parallel Activities** Parallel activities are two or more activities than can be

done at the same time. This allows a project to be completed faster than if the activities were arranged

serially in a straight line.

**Parametric Estimating** Estimating using an algorithm in which parameters that

represent different attributes of the project are used to calculate project effort, cost, and/or duration. Parametric

estimating is usually used in top-down Estimating.

**Performance Indicators** Something observed or calculated that acts as an

approximation of, or proxy for, changes in the phenomenon

of interest.

**Performance Measures** Performance measures describe how success in achieving

the agency goals will be measured and tracked. Performance measure targets provide the quantifiable answer to the question, "How will we know when we've been successful in achieving our goal?" Analyzing the gaps between current performance levels and performance targets helps organizations identify priority areas needing improvement and develop strategies that will close the gap.

Performance Outcomes Results or consequences of the efforts enacted during the

Results or consequences of the efforts enacted during the project's planning and execution.

PERT Program Evaluation and Review Technique A scheduling

technique that makes use of dependency analysis and critical path to determine the duration of a project and slack to determine priorities of tasks. In PERT, task durations are computed as (Optimistic + 4xMost likely +

Pessimistic estimates) / 6).

**PERT Diagram** A type of network diagram deriving its name from the PERT

technique. The term is often used as a synonym for

network diagram.

**Phase** A grouping of activities in a project that are required to

meet a major milestone by providing a significant

deliverable, such as a requirements definition or product design document. A project is broken down into a set of

phases for control purposes. The phase is usually the highest level of breakdown of a project in the WBS.

PIR (Post

**Implementation Review)** 

Also known as Close Out Report. This is a report compiled upon completion of every project, which determines if the expectations established for the project outcome were met. It documents the comparison between actual results of a project and the objectives and deliverables specified in the project's Charter.

**Planning** 

The process of establishing and maintaining the definition of the scope of a project, the way the project will be performed (procedures and tasks), roles and responsibilities and the time and cost estimates.

**Portfolio management** 

Portfolio management is the selection and management of all of an organization's projects, programs and related business-as-usual activities taking into account resource constraints. A portfolio is a group of projects and programs carried out under the sponsorship of an organization. Portfolios can be managed at an organizational, program or functional level.

**Post-Project Evaluation** 

An activity to assess and evaluate the way a project was performed, so as to learn from the experience and continuously improve project performance.

Power

Power is the ability to influence the actions of others. Power may come from the formal delegation of authority, reference power, and subject matter expertise, the ability to influence rewards and penalties, as well as other sources.

**Predecessor Task** 

A task (or activity) that must be started or finished before another task or milestone can be performed.

**Probability** 

The likelihood of a risk occurring. Usually expressed as a probability percentage or a relative scale such as low, medium or high.

**Process** 

A series of steps or actions to accomplish something. A natural series of changes or occurrences.

**Procurement** 

Procurement is the process by which the resources (goods and services) required by a project are acquired. It includes development of the procurement strategy, preparation of contracts, selection and acquisition of suppliers, and management of the contracts.

**Program** 

A suite of related projects and ongoing operational activities managed as a whole.

**Program Management** 

Program management is the coordinated management of related projects, which may include related organizational activities that together achieve a beneficial change of a strategic nature for an organization.

**Program Manager** The person who directs the planning and execution of a

program and is held personally accountable for the success

of the program.

Programmatic Drivers/Background Statement An explanation of why the project is needed and why it is being recommended at this time. It describes the problem or issue that will be resolved by the project as well as any background information necessary to understand the problem.

**Project** 

A project is a one-time effort to accomplish an explicit objective by a specific time. Each project is unique although similar projects may exist. Like the individual activity, the project has a distinguishable start and finish and a time frame for completion. Each activity in the project will be monitored and controlled to determine its impact on other activities and projects

Project Approach Statement

A statement of the way the project will do things. For example, project planning may require different approaches, or different approaches may be considered as a way of reducing project risks.

**Project Assumptions** 

Written statements relative to the project, which help to clarify scope, objectives and other relevant factors that cannot be known at a given point in time.

**Project Charter** 

A document that describes the project at a high level of detail and is used to authorize the Project Manager to begin work. It may also be called a "Project Brief," or any number of other synonyms.

**Project Context** 

Project context refers to the environment within which a project is undertaken. Projects do not exist in a vacuum and an appreciation of the context within which the project is being performed will assist those involved in project management to deliver a project.

**Project Donor** 

The funding agency that provides funds to the project.

**Project Environment** 

The combined internal and external forces, both individual and collective, which assist or restrict the attainment of the project objectives.

Project Financing and Funding

Project financing and funding are the means by which the capital to undertake a project is initially secured and then made available at the appropriate time. Projects may be financed externally, funded internally or a combination of both.

**Project Life Cycle** 

The full set of activities from the beginning to the end of a project. Generally associated with a set of phases, which are determined based on the major parts of project performance (e.g., requirements definition, design, construction, deployment) and the need for control by the Client organization (checkpoints for Go/No go decision-

making).

#### **Project Management**

Project management is the process by which projects are defined, planned, monitored, controlled and delivered such that the agreed benefits are realized. Projects are unique, transient endeavors undertook to achieve a desired outcome. Projects are about change and project management is recognized as the most efficient way of managing such change.

## **Project Management Life Cycle**

The sequential major time periods through which any project passes, namely: Initiation, Planning, Implementation, Monitoring, Closure, Each period may be identified as a phase and further broken down into stages.

## Project Management plan

The project management plan brings together all the plans for a project. The purpose of the project management plan (PMP) is to document the outcomes of the planning process and to provide the reference document for managing the project. The project management plan is owned by the project manager.

#### **Project Manager**

The person responsible and accountable for managing a project's planning and performance. The single point of accountability for a project.

#### **Project Objectives**

Descriptions of the project's intended results.

#### **Project Office**

A project office serves the organization's project management needs. A project office can range from simple support functions for the project manager to being responsible for linking corporate strategy to project execution.

#### **Project Outcomes**

A result or consequence of the project activity.

#### **Project Proposal**

A document prepared by the INGO to managers and donors to obtain approval and funding for a proposed project. It stands as the agreement among the relevant Stakeholders about the analysis of the situation and the resulting plan of action.

#### Project Quality Management

Project quality management is the discipline that is applied to ensure that both the outputs of the project and the processes by which the outputs are delivered meet the required needs of stakeholders. Quality is broadly defined as fitness for purpose or more narrowly as the degree of conformance of the outputs and process.

#### **Project reviews**

Project reviews take place throughout the project life cycle to check the likely or actual achievement of the objectives specified in the project management plan (PMP) and the benefits detailed in the business case. Additional reviews will take place following handover and closeout to ensure that the benefits are being realized by the organization.

**Project risk management** Project risk management is a structured process that allows

individual risk events and overall project risk to be understood and managed proactively, optimizing project

success by minimizing threats and maximizing

opportunities.

**Project Scope Statement** A concise and accurate description of the expected work,

products and deliverables. Also includes works and

products that are not included in the project.

**Project sponsorship** Project sponsorship is an active senior management role,

responsible for identifying the business need, problem or opportunity. The sponsor ensures the project remains a viable proposition and that benefits are realized, resolving any issues outside the control of the project manager.

**Project Statement** A concise statement that clearly identifies the project's

purpose, or desired outcome. It generally includes three

components: cost, time and performance.

**Project Status Reports** A written report produced by the project manager and sent

to a senior manager or project supervisor on a regular basis, stating the position of an activity, work package, or the whole project. Status reports control the project and

keep management informed of project status.

**Project Success** Project success is the satisfaction of stakeholder needs and

is measured by the success criteria as identified and agreed

at the start of the project.

**Project Team Members** Members of the core project team and those that are

assigned to the development and/or support the project

deliverables.

**Quality Assurance (QA)** Making sure standards and procedures are effective and

that they are complied with. Note, in some organizations

QA is used to refer to the quality control function.

**Quality Control (QC)** Making sure deliverables comply with acceptance criteria.

Includes testing and reviews.

**Relative Date** A date expressed as a number of periods (e.g., days,

weeks, or months) from a reference point. For example, two months after the project start date. See Calendar Date.

Request for Applications

(RFA)

Request for Applications. This is a document sent out to the development community to inform them that funding will

be made available in the form of grants to development organizations interested in conducting development work in

a specific area.

**Request for Proposal** 

(RFP)

An RFP is an announcement, often by the government agency, of a willingness to consider proposals for the

performance of a specified project or program component.
A request for proposals is often issued when proposals for a

specific research project are being sought.

**Required Approvals** Required sign offs, usually by higher authority.

**Resource** Any tangible support such as, a person, tool, supply item or

facility used in the performance of a project. Human

resources are people.

**Resource Dependency** A dependency between tasks in which the tasks share the

same resources and therefore cannot be worked on simultaneously. Resource dependent tasks can be scheduled at the same time but are limited by the

availability of the shared resources.

**Resource Leveling** Resource leveling is the part of the scheduling process in

which the start and end dates of tasks are driven by resource limitations (e.g., limited availability of resources or difficult-to-manage resource levels). Among the scheduling objectives, is to ensure that resources are not overburdened (don't schedule more resources for a period than are available) and that (as much as possible) there are not significant peaks and valleys in the resource

schedule.

**Resource Loading**The process of assigning resources (people, facilities and

equipment) to a project, usually activity by activity.

**Resource management** Resource management identifies and assigns resources to

activities so that the project is undertaken using appropriate levels of resources and within an acceptable duration. Resource allocation, smoothing, leveling and scheduling are techniques used to determine and manage

appropriate levels of resources.

**Responsibility** The obligation to perform or take care of something,

usually with the liability to be accountable for loss or failure. Responsibility may be delegated to others but the

delegation does not eliminate the responsibility.

Responsibility
Assignment Matrix

(RAM)

A tool used to relate each project activity in the WBS with a responsible organization unit or individual. Its purpose is to ensure that every activity is assigned to one or more individuals (only one with primary responsibility) and that

the individuals are aware of their responsibilities.

**Results** Results are changes in a state or condition which derive

from a cause-and- effect relationship. There are three types of such changes (intended or unintended, positive and/or negative) which can be set in motion by a development intervention – its output, outcome and

A management strategy by which an organization ensures

impact.

Results Based

**Management (RBM)** that its processes, products and services contribute to the achievement of desired results (outputs, outcomes and impacts). RBM rests on clearly defined accountability for

results, and requires monitoring and self-assessment of progress towards results, and reporting on performance.

**Risk** A future event or problem that exists outside of the control

of the project that will have an adverse impact on the project if it occurs. Risk involves the probability of

occurrence and the possible consequences or impact. Unlike an issue that is a current problem that must be dealt with, a risk is a potential problem that has not yet occurred.

**Risk Analysis** An examination of risk areas or events to assess the

probable consequences for each event, or combination of events in the analysis, and determine possible options for

avoidance.

**Risk Assessment** Part of risk management in which planners identify

potential risks and describe them, usually in terms of their symptoms, causes, probability of occurrence and potential

impact.

**Risk Exposure** The likely loss or consequence of a risk. It is the combined

probability and impact of a risk usually expressed as the

product or probability x impact.

**Risk Impact** The harm or consequences for a project of a risk if it

occurs. Usually expressed on a relative scale such as low,

medium or high.

**Risk Management** A process to assess potential problems (risks), determine

which risks are important to deal with, and implement strategies to reduce the likelihood or consequences

(impact) of those problems.

**Risk Mitigation** Actions taken to eliminate or reduce risk by reducing the

probability and or impact of occurrence.

**Risk Probability** The likelihood of a risk occurring. Usually expressed as a

probability percentage or a relative scale such as low,

medium or high.

**Risk Response** An action that can be taken to address the occurrence of a

risk event. Contingency plans are collections of risk

responses.

**Risk Trigger** Events or thresholds for indicators that specify when an

action such as implementing a contingency plan needs to

be taken.

**Schedule** The project timeline, identifying the dates (absolute or

relative to a start date) that project tasks will be started and completed, resources will be required and upon which

milestones will be reached.

**Scheduling** Scheduling is the process used to determine the overall

project duration and when activities and events are planned to happen. This includes identification of activities and their logical dependencies, and estimation of activity durations,

taking into account requirements and availability of

resources.

**Scope** Scope is defined in terms of three dimensions—product,

project and impact. Product scope is the full set of features and functions to be provided as a result of the project. The project scope is the work that has to be made to deliver the

product. Impact scope is the depth and breadth of involvement by, and effect on, the performing and client

organizations.

**Scope Change** Any change in the definition of the project scope. Scope

change can result from changes in client needs, discovery

of defects or omissions, regulatory changes, etc.

**Scope Change Control** Also called scope change management. The process of

making sure that all changes to the project scope are consciously evaluated and their implications to the project plan are considered in making a decision to make the

change, postpone it or reject it.

**Scope Creep** The unconscious growth of the project scope resulting from

uncontrolled changes to requirements.

**Scope Definition** Breaking down the project's major deliverables into

smaller, more manageable components to make

verifications, development and project control easier. This may be part of requirements definition and/or design.

**Scope Management** Scope management is the process by which the

deliverables and work to produce them are identified and defined. Identification and definition of the scope must describe what the project will include and what it will not

include, i.e. what is in and out of scope.

**Scope Planning** Development of a statement of the principle deliverables of

a project along with the project's justification (business case) and objectives. Part of requirements definition.

**Scope Verification** PMI's PMBOK Guide defines this as the process to ensure

that all project deliverables have been completed satisfactorily. It is associated with acceptance of the

product by clients and sponsors.

**Sequence** Sequence is the order in which activities will occur with

respect to one another. This establishes the priority and dependencies between activities. Successor and predecessor relationships are developed in a network

format. This allows those involved in the project to visualize

the work flow.

**Sequencing Tasks** A part of the scheduling process in which the tasks are

positioned in series or in parallel to one another based on dependencies between them. Sequencing results in a task

network.

**Slippage** Slippage is the amount of slack or float time used up by the

current activity due to a delayed start. If an activity without

float is delayed, the entire project will slip.

**SMART** The five elements for a well-worded objective, namely

Specific, Measurable, Achievable, Realistic, Time Bound.

**Specifications** Detailed statements of project deliverables that result from

requirements definition and design. Specifications generally

describe the deliverables in terms of appearance,

operational constraints and quality attributes. Specifications

are the basis for acceptance criteria used in scope

verification and quality control. In some organizations and industries, specifications may be qualified as requirements specifications and design specifications. See Requirements.

**Stakeholder** Anybody and everybody with a stake in the project -

clients, sponsors, performers, the general public and even the family and friends of direct participants can be considered stakeholders. Not to be confused with the guy that holds the stake when the vampire slayer slays the

vampire.

**Stakeholder** Stakeholder management is the systematic identification, analysis and planning of actions to communicate with,

analysis and planning of actions to communicate with, negotiate with and influence stakeholders. Stakeholders are all those who have an interest or role in the project or are

impacted by the project.

**Stakeholders** The people who have a vested interest in the outcome of

the project.

**Starting Activity** A starting activity has no predecessors. It does not have to

wait for any other activity to start. Many PM software packages permit multiple start activities if needed

**Statement of Work** A description of the scope of a project centered on the

major deliverables and constraints.

**Steering Committee** A group of people who monitor the project and give

guidance to the project sponsor or project manager.

**Strategic Plan** A plan that is tightly tied to the organization's mission,

vision, values and objectives, and depends heavily on highlevel coordination and influences management to achieve

their goals.

**Sub Grant** An award of financial assistance in the form of money, or

property in lieu of money, made under a grant by a grantee

to an eligible sub-grantee.

**Sub Grantee** A legal entity to which a sub-grant is awarded and which is

accountable to the grantee for the use of the funds

provided

**Sub-contractor** A group or individual providing products or services to the

project. Commonly, sub-contractors are considered to be vendors. However there is a growing understanding that any internal group that provides products or services (e.g.,

an internal technical writing department) is a sub-

contractor to the project manager. Of course in this broader usage, the agreement between the parties is not a legally

binding contract but it is a contract nonetheless.

**Subject Matter Expert** 

(SME)

An expert in some aspect of the project's content expected to provide input to the project team regarding business, scientific, engineering or other subjects. Input may be in the form of requirements, planning, resolutions to issues

A subproject is a distinct group of activities that comprise **Subproject** 

and/or review of project results.

their own project which in turn is a part of a larger project. Subprojects are summarized into a single activity to hide

the detail

Sub-task A breakdown of a task into the work elements that make it

up. A task must be broken down into at least two sub-tasks

for a meaningful decomposition.

Successor A task or milestone that is logically linked to one or more

predecessor tasks.

A piece of work requiring effort, resources and having a Task

> concrete outcome (a deliverable). A task may be of any size (a project is a very large task). Sometimes the term is used to denote a piece of work at a particular level in a Work Breakdown Structure (WBS) hierarchy e.g., a phase is broken into a set of activities, and an activity into a set of

tasks. Except for this hierarchical usage, activity is

synonymous with task.

**Task Dependency** A relationship in which a task or milestone relies on other

tasks to be performed (completely or partially) before it can

be performed. Also referred to as a logical relationship.

**Teamwork** Teamwork is when people work collaboratively towards a

common goal as distinct from other ways that individuals

can work within a group.

**Top-down Estimating** Approximating the size (duration and cost) and risk of a

project (or phase) by looking at the project as a whole and comparing it to previously performed similar projects. The comparison may be made directly using "analogous estimating," through an algorithm as in "parametric

estimating", or from the memory of estimating experts.

**Total Float** Total float is the excess time available for an activity to be

expanded or delayed without affecting the rest of the

project -- assuming it begins at its earliest time.

**Variance** The difference between estimated cost, duration or effort

and the actual result of performance. In addition, can be the difference between the initial or baseline product scope

and the actual product delivered.

**Vendor** An organization or individuals providing products or

services under contract to the client or to the project performance group. Also called outside contractors or sub-

contractors.

**Vision Statement** A statement that captures the long-term picture of what

the organization wants to become. A vision statement must be inspirational, memorable and reflect the desires of those with vested interests. An example would be, "To be

recognized for leadership, innovation and excellence in improving the health of individuals and populations."

Work Breakdown A
Structure (WBS)

A hierarchical task list created by decomposing the project based on the breakdown of the product into components and the breakdown of the project process into increasingly detailed tasks. The WBS is depicted as a tree diagram (or hierarchy chart) or as a list in outline form with detailed

items subordinated to higher-level items.

**Work Flow** Work flow is the relationship of the activities in a project

from start to finish. Work flow takes into consideration all

types of activity relationships.

Work Load Work load is the amount of work units assigned to a

resource over a period of time.

Work Package A task at a low level of the Work Breakdown Structure at

which project accounting is performed. Usually a week or so in duration and performed by an individual or small work

group.

**Work Units** Work units is the measurement of resources. For example,

people as a resource can be measured by the number of

hours they work.

**Zero Float** Zero float is a condition where there is no excess time

between activities. An activity with zero float is considered a critical activity. If the duration of any critical activity is increased (the activity slips), the project finish date will

slip.

### PM4DEV.COM

Drawing from our deep understanding of the challenges and the needs for realistic solutions that can improve the way in which projects are managed and services are delivered, PM4DEV offers the only adapted Project Management Methodology for development organizations. Our services include:

- Consulting, to help organizations implement a project Management methodology that will increase the impact of their interventions.
- On Site Training on project management methods to increase and develop the skills of project managers
- Online Learning for project managers that want to develop their own competencies on a flexible online learning environment.

To get more information on these services, visit our web site at <a href="www.pm4dev.com/services">www.pm4dev.com/services</a> or send us an email to services@pm4dev.com. We offer competitive prices and high quality material developed by international certified experts in Project Management.

Copyright © 2015 PM4DEV All rights reserved.

PM4DEV, its logo, and Management for Development Series are trademarks of Project Management For Development, PM4DEV.

This point of view is intended as a general guide and not as a substitute for detailed advice. Neither should it be taken as providing technical or other professional advice on any of the topics covered. So far as PM4DEV is aware the information it contains is correct and accurate but no responsibility is accepted for any inaccuracy or error or any action taken in reliance on this publication.

This publication contains PM4DEV copyrighted material and no part of it can be copied or otherwise disseminated for commercial purposes.

This Point of view provides a summary of themes, that in PM4DEV's experience, have proved critical in the successful implementation of project management methodologies.

It draws on the expertise of Project management professionals and provides a guide to deliver a methodology that increases the chances of project success.

For more information about PM4DEV services, contact us at: info@pm4dev.com

The Sustainable Development Goals (SDG) aim by 2030 to end poverty, protect the planet, and ensure prosperity for all.

PM4DEV is committed to provide resources and develop knowledge and expertise to support development organizations in their efforts to achieve these ambitious goals.



Project Management For Development Organizations

www.pm4dev.com info@pm4dev.com