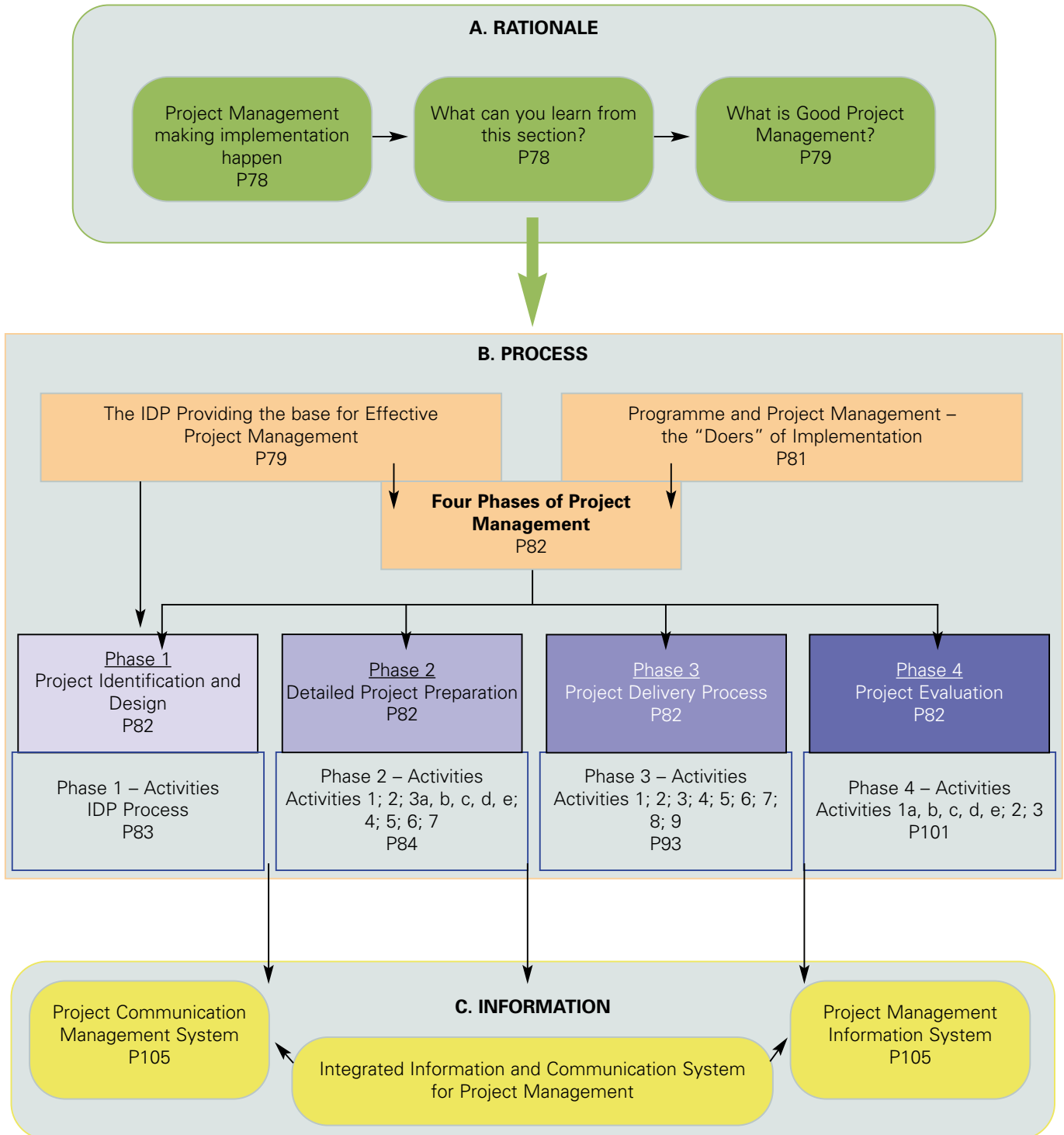


# SECTION 4 – PROJECT MANAGEMENT: MAKING SURE THE PRIORITY PROJECTS ARE DELIVERED

## ROUTE MAP FOR THIS SECTION



## A. RATIONALE

### 1. PROJECT MANAGEMENT MAKING IMPLEMENTATION HAPPEN

Prioritised Projects are the practical outputs of a good IDP. They are the means through which the Municipality achieves its prioritised developmental objectives. The delivered project is the core of the Municipality's development implementation and delivery.

To use the popular technical words – It is the **process** that turns the **managed inputs** e.g. finances, technical skills and human resources into the **development outputs** that the Municipality has defined through its IDP.

#### INFORMATION BOX

##### Inputs, Outputs and Outcomes

These are often-used technical words to describe very practical things about projects and programmes. To ensure that there is a shared understanding here are some short definitions and examples taken from a housing delivery project of 50 serviced units.

##### Inputs:

The resources e.g. finances, technical skills, materials, direct and indirect, that are required to deliver the finished product(s) of the project.

##### Example:

To service the land and build houses the inputs would include:

- Finances – Subsidy and Loan
- Design – Housing and Services
- Construction Equipment
- Construction Personnel
- Contract Management
- . . . . . (You can add others.)

##### Outputs:

These are the practical things that are produced in a project after using the inputs.

##### Example:

50 – 45m<sup>2</sup> houses on serviced sites of 300m<sup>2</sup> with tarred roads, electrification and storm water drainage.

##### Outcomes

The effect that the outputs have on the people who should benefit. Usually the outcomes are compared with the developmental objectives of the Municipality.

##### Example:

- 55 homeless households provided with good quality basic housing.
- Improved health conditions for these households because they were previously living in damp shacks close to polluted pond.
- Temporary employment for some local people because of contractor having to employ local labour.

DPLG's "**Performance Management – A Guide for Municipalities**" deals with these in more detail.

The previous sections in this manual have concentrated on organising and structuring the Municipality to ensure that implementation can happen. This section deals with project management that makes it happen.

### 2. PURPOSE OF THIS SECTION

The section will concentrate on what the Municipality should do to ensure effective project management.

It should help you:

- Understand what project management is.
- What are the key principles and policy underpinning project management.
- What is required of a good project management system.
- Assess how well your project management system is structured for implementation.
- Understand the base that the IDP gives for good project management.
- Decide what could be done to improve the project management in your Municipality.

### EMPHASIS BOX

This section is not intended as a comprehensive guide for project management – there are many guides and manuals available on the subject. This section applies approaches to a good project management in the implementation of the IDP.

### 3. WHAT IS GOOD PROJECT MANAGEMENT?

Good project management is the efficient management of the resource inputs that are needed to deliver the development required on the ground. To be effective it must meet the following principles:

- most efficient use of the resources available for the project;
- most efficient management of the timing of the inputs; and
- proper control of the quality of the outputs.

## B. PROCESS

### 1. THE IDP – PROVIDING THE BASE FOR EFFICIENT PROJECT MANAGEMENT

The IDP turns developmental objectives into strategies and strategies into projects.

The project is the primary mode of delivery and implementation of the Municipality's IDP Action Plan.

The IDP makes the following contribution to good project management:

- Identifying key projects.
- Defining their developmental purposes.
- Defining the key elements in each project.
- Integrating these as a Draft Project Proposal.
- Defining the Draft Project Proposal.
- Prioritising it for implementation.

The following define the key activities and outputs of the IDP in different phases that contribute to a base for Project Management.

IDP PHASES AND ACTIVITIES	OUTPUTS RELEVANT TO PROJECT MANAGEMENT	RELEVANCE TO PROJECT MANAGEMENT
<b>PHASE 1 – ANALYSIS STAGE</b>		
1/4c – Institutional Analysis	Overview of strengths and weaknesses of project management system.	Identifies what is required to improve and properly resource the right Financial Management System.
1/9 – Analysis of priority issues – Resources/Potentials	Identification of sector specific financial resources available for projects and the skills and personnel resources available for managing projects.	Better understanding of what is available and what needs doing for good project management.
<b>PHASE 2 – STRATEGIES</b>		
2/2 – Objectives for Each Priority Issues	Developmental objectives defined.	<ul style="list-style-type: none"> <li>– The developmental objectives that define specific project outcomes.</li> <li>– Objectives against which the outcomes of projects are measured.</li> </ul>
2/5 to 2/10 – Creating Development Strategies	<ul style="list-style-type: none"> <li>– Revised objectives/vision.</li> <li>– Listing of projects likely to require implementation.</li> </ul>	Projects linked more closely with objectives and resource potential and constraints ready for more detailed design.

IDP PHASES AND ACTIVITIES	OUTPUTS RELEVANT TO PROJECT MANAGEMENT	RELEVANCE TO PROJECT MANAGEMENT
<b>PHASE 3 – PROJECTS</b>		
3/1 Formation of: <b>Project Formulation Task Teams</b>	Project formulation team set-up (with key people needed to design project) and linked to implementation.	Setting up of cross-sectoral team that will provide the core for project management of the project through implementation.
3/2 – Preliminary budget Allocation per Project	Cost, budget and financial source estimates for each project.	Defines the financial potential and constraints within which project design will take place.
3 /4 – Public Target Group participation	Structured community input into project planning.	Preparing the way for structuring beneficiary and government departments' inputs into project management.
3/5 – Involvement of National and Political Spheres	Structured commitment and structuring of other government stakeholders in project design and management.	Preparing the way for structuring beneficiary and government departments' inputs into project management.
3/6 to 3/9 – Preparation of Draft Project Proposal	<p><b>KEY OUTPUT FOR PROJECT MANAGEMENT</b></p> <p>Draft Project Proposal including indicators for objectives:</p> <ul style="list-style-type: none"> <li>– Project outputs, targets and location</li> <li>– Major Activities, Timing and Responsible Agencies.</li> <li>– Cost/Budget Estimates/Sources of Finance.</li> </ul>	<p>Clear definition of the key project elements of management plan for project implementation.</p> <p>Subject to any variations from Integration Phase this becomes the</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;"> <p><b>Baseline Project Plan in Project Management Process.</b></p> </div>

<b>PHASE 4 – INTEGRATION</b>		
Activity 4/1 – 4/3c – Project Feasibility and Viability checks – Programme Plans	<ul style="list-style-type: none"> <li>– Revised project proposals including adjustments to any of planned elements.</li> <li>– Draft sector programmes integrating where necessary different project input and outputs with objectives.</li> </ul>	Further refining of project plans and prioritising of projects for project management implementation.
<b>OPERATIONAL STRATEGY FOR MUNICIPALITY</b>		
Activities: 4/4, 4/5, 4/6, 4/7 5 Year Financial Plan 5 Year capital Investment Programme 5 year Action Programme	5 Year Plans that identify priority projects and the likely financial resources available.	Forms basis for establishment of annual budgets, capital programme and action plan that will give prioritised projects with framework of elements for each project.
Activity 4/7 Integrated Monitoring and Performance Management System	<ul style="list-style-type: none"> <li>– Tabulated output targets for each project.</li> <li>– Time schedule with major milestones on each project.</li> </ul>	Key project indicators and major milestones built into integrated M&E for feedback on progress to project managers, senior management and politicians.
Activity 4/12 Integrated Institutional Programme	Specific proposals regarding institutional organisation to ensure smooth implementation of the IDP.	Specific proposals for improvements to the project management system and its resourcing to ensure implementation of projects.

PHASE 5 – APPROVAL		
	Adoption of IDP by Municipal Council. Linked adoption of the Municipality's annual budget.	Official endorsement of the: <ul style="list-style-type: none"> <li>– development objectives</li> <li>– prioritised project list</li> <li>– financing of projects</li> <li>– integrated programmes</li> <li>– Institutional arrangements for implementing the projects</li> </ul>



## 2. PROGRAMME AND PROJECT MANAGEMENT: THE “DOER” OF IMPLEMENTATION

The management of implementation rests within the administrative and not the political structures of the Municipality.

The political structure has an important part to play in:

- the monitoring of the programme of implementation;
- representing views of the residents about the nature of projects, their programme and quality; and
- mobilising appropriate community involvement in the delivery process.

Within the administration the project management takes place at two levels:

- **Management of Programmes**
  - Municipal
  - Sector
  - Integrated Cross Sectoral
- **Management of Prioritised Projects**
  - Capital
  - Operational

### INFORMATION BOX

#### What is a “PROGRAMME”

This is a term that is used in many different ways. It is important to understand well what it means in the context of this Guide.

Generally it refers to a planned series of activities from different projects that help achieve the same development objective. It is also used to refer to a grouping of linked projects.

In the context of this Guide and the IDP they are defined as follows:

#### Consolidated and Integrated **Municipal Programmes:**

This is the totality of implementation and service delivery carried out by the Municipality in achieving its statutory and developmental objectives. Important components are the capital and operationally funded projects from the IDP. There are also other activities, e.g. routine maintenance, included in this concept of programme.

#### Consolidated and Integrated **Sector Programmes:**

These are the activities and projects of delivery and implementation defined according to the agencies or departments within the Council responsible for delivery

**e.g.** The programme of the Engineering Department would contain all the projects or activities in joint projects for which the Engineering Department is responsible.

#### Consolidated and Integrated **Cross Sectoral Programmes:**

This refers to the project and activities that are consolidated and integrated into programmes to meet key specialist developmental objectives.

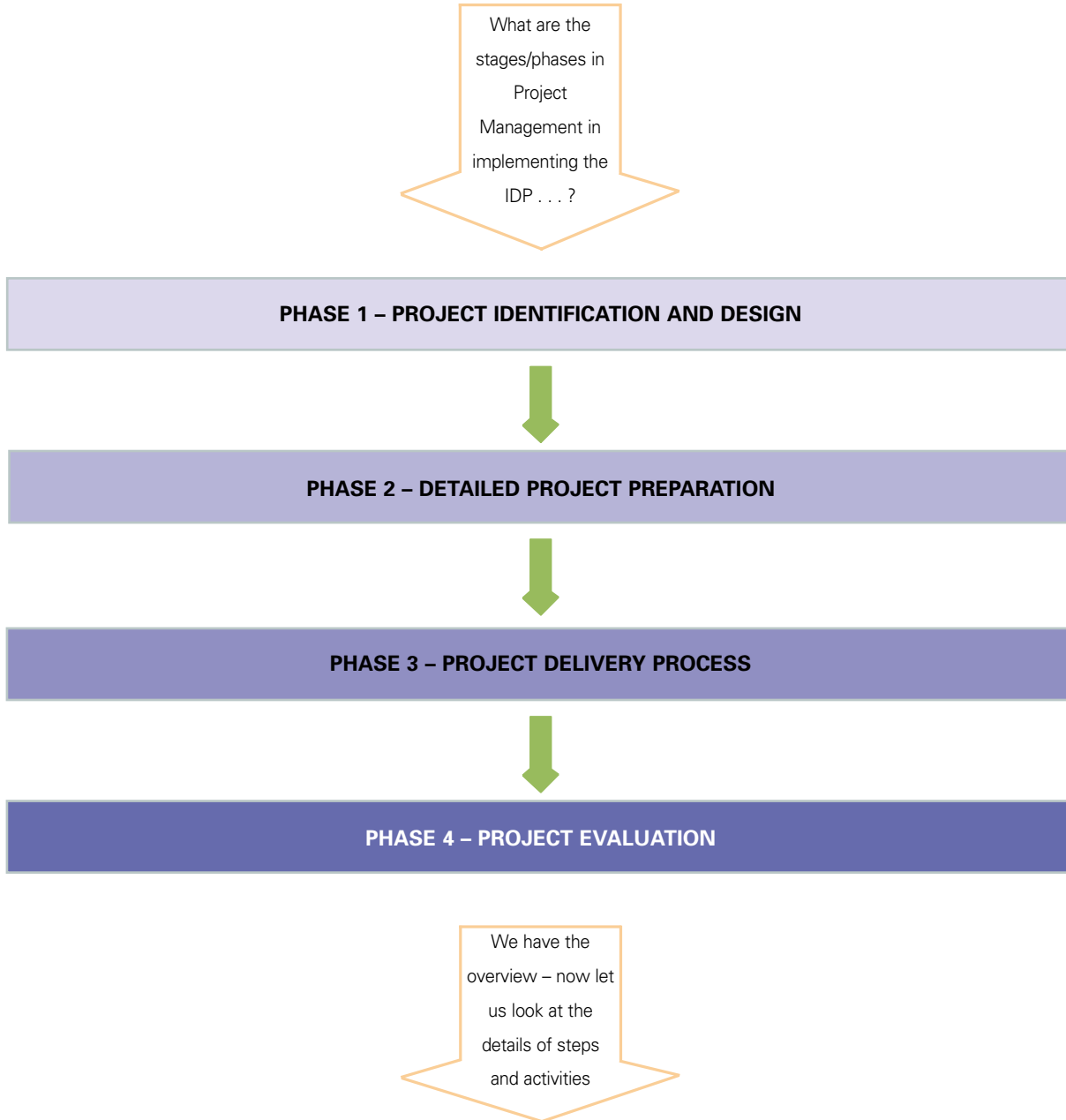
**e.g.** Poverty Reduction and Gender Equity, HIV and Aids, LED, Environmental.

Management of programmes and projects are closely interlinked management processes that rely on their interaction to achieve effective implementation.

Although programme management is important, we concentrate here on the primary process of project management.

### 3. PHASES IN PROJECT MANAGEMENT

Below is an overview of the phases of project management for the implementation of the IDP. In the next subsection we consider the key steps and activities in each Phase.

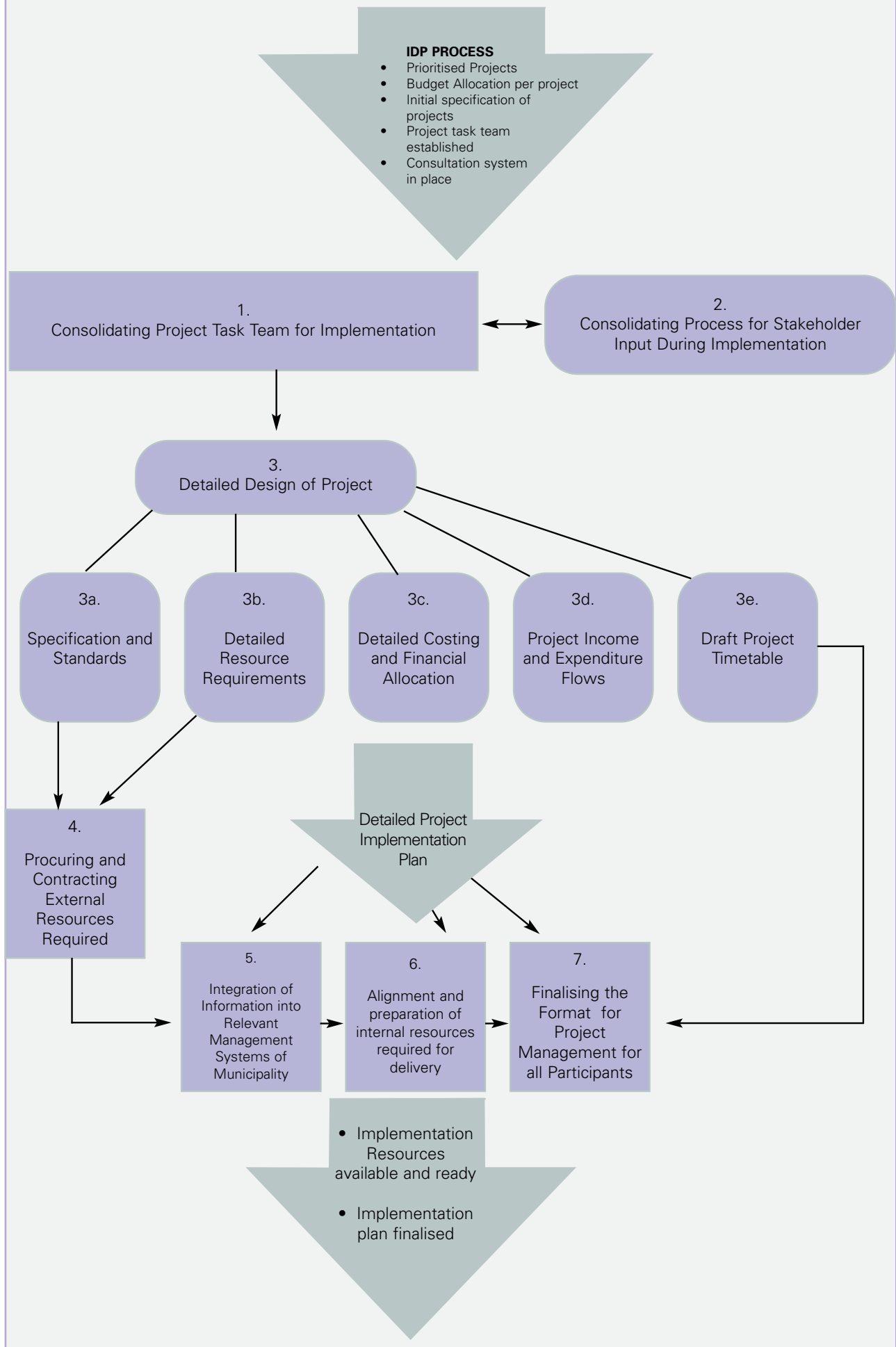


#### 4. PROJECT MANAGEMENT STEPS

The following are the detailed steps by phase.

<b>PHASE 1</b>	<b>PROJECT IDENTIFICATION AND DESIGN</b>
<b>Purpose:</b>	To identify and initially define the project and its key components to ensure it meets development objectives and is feasible in terms of resources and capacity.
<b>Processes:</b>	Defining of project linked to developmental objectives through Analysis, Strategy, Project and Integration Phases of the IDP.
<b>Outputs:</b>	<ul style="list-style-type: none"> <li>• Prioritised project linked to specific part of approved annual action plan and budget.</li> <li>• Draft definition of key project components: <ul style="list-style-type: none"> <li>– Objectives</li> <li>– Indicators for objectives</li> <li>– Outputs</li> <li>– Targets and Target groups</li> <li>– Locations</li> <li>– Major Activities</li> <li>– Responsible agencies</li> <li>– Timing</li> <li>– Costs</li> <li>– Budget Estimates</li> <li>– Sources of finance</li> </ul> </li> </ul> <p>(See completed – Project Design Proposal)</p>
<b>ACTIVITIES PHASE 1</b>	<b>PROJECT IDENTIFICATION AND DESIGN</b>
See the relevant Phases in IDP Process – Summary B1 P79	
<b>PHASE 2</b>	<b>DETAILED PROJECT PREPARATION</b>
<b>Purpose:</b>	<ul style="list-style-type: none"> <li>• To undertake the detailed design of the project with the necessary inputs from technical experts, likely beneficiaries and other relevant stakeholders.</li> <li>• To ensure the required resources are secured and ready to input at the appropriate time in project implementation.</li> </ul>
<b>Processes:</b>	<ul style="list-style-type: none"> <li>• Detailed technical design and specification where required.</li> <li>• Detailed costing and projected income and expenditure flows.</li> <li>• Defining non-financial inputs and form.</li> <li>• Procurement of resources.</li> <li>• Consultation with beneficiaries and other relevant stakeholders.</li> </ul>
<b>Outputs:</b>	<ul style="list-style-type: none"> <li>• Project Task Team in place</li> <li>• Project Manager assigned</li> <li>• Detailed project specifications and standards</li> <li>• Detailed costing and income and expenditure flow chart</li> <li>• Detailed project implementation timetable</li> <li>• Designated and assigned internal implementation staff (where applicable)</li> <li>• Contracted external implementation agents (where applicable).</li> </ul>

## ACTIVITIES PHASE 2 – DETAILED PROJECT PREPARATION





**ACTIVITY 2/1: Consolidating project task team for implementation**

**Purpose:**  
**WHY?**

- To put in place the best and most effective team to co-ordinate the project taking into account cross-sectoral inputs.
- Ensure that there is a project manager with the ability to manage the project.
- Ensure that all key resource people understand their respective roles.

**Minimum Requirements: w/r to Output**  
**WHAT?**

- Established project team and designated Project Manager with clarity on briefs and project management procedures and format for project.

**Hints for Structuring the Process:**  
**HOW?**

- Use the same team involved in the Project Phase of IDP unless additional people who have key responsibility for implementation are required; or some on initial team can be involved only in broader planning and not required for implementation.
- Keep team as lean as is needed for effective implementation.

<b>Suggested Institutional Arrangements/ Responsibilities:</b> <b>WHO?</b>	<b>Strategic management Team or Snr Line Managers</b>	<ul style="list-style-type: none"> <li>• Designate and brief Project Manager</li> <li>• Agree to Project Task Team</li> </ul>
	<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Convene Project Task Team</li> <li>• Prepare structure for managing project</li> </ul>

**ACTIVITY 2/2: Consolidating stakeholder consultation process for implementation**

**Purpose:**  
**WHY?**

- To ensure that all relevant stakeholders have input into the project process without causing undue delays or costs.
- Ensure that all stakeholders understand the channels available.

**Output:**  
**WHAT?**

- Established consultation procedure properly understood by key stakeholders.

**Hints for Structuring the Process:**  
**HOW?**

- Evolve the form of the community and stakeholder consultation used in Phase 3 of IDP Process.
- Ensure that the forms of input and feedback minimise the chance that small interest groups use this to delay delivery.

**Hints for Designing the Output:**

Agreed input procedures should be clear to all stakeholders.

<b>Institutional Arrangements/ Responsibilities:</b> <b>WHO?</b>	<b>Strategic management Team and Councillors</b>	<ul style="list-style-type: none"> <li>• Approve the approach</li> </ul>
	<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Design and manage the consultation process with involvement of project task team</li> </ul>

**STEP 2/3:**

**Detailed design of the project**

**Purpose**

**WHY?**

- To carry out the detailed design of the project so that the outputs are properly specified and the inputs are properly determined.
- To have ready a detailed implementation schedule to guide the implementation of the project.

**Minimum Requirements: w/r to Output**

**WHAT?**

- Detailed technical specification of all outputs.
- Detailed schedule of input resources and where they will be sourced.
- Detailed costings.
- Planned income expenditure flows for project.
- Project implementation schedule with revised key milestones.

**Hints for Structuring the Process:**

**HOW?**

- Use the revised Project Schedule prepared in Phase 3 of IDP and revised in Phase 4 & 5 as the base for the detailed planning.
- Generally require the inputs from technically skilled people in the design step.
- Might need external technical people where they do not exist within the Council.
- The Project Manager does not have to have all the technical skills required for project. S/He must know what skills are needed when and then resource them.
- Prepare the format that can be integrated into the project information and monitoring system. As far as possible to standardise the formats across the Council and link to the different management systems.

**Suggested Institutional Arrangements/ Responsibilities:**

**WHO?**

<b>Strategic management Team or Snr Line Managers</b>	<ul style="list-style-type: none"> <li>• Designate and brief project manager</li> <li>• Agree to project task team</li> </ul>
<b>Project Manager/ Project Task Team</b>	<ul style="list-style-type: none"> <li>• Manage the detailed design process</li> <li>• Align and integrate the different technical components</li> </ul>
<b>Technical Experts</b>	<ul style="list-style-type: none"> <li>• Input their technical expertise to the project design.</li> <li>• Can do this either as a member of the project team or as separate input.</li> </ul>

**ACTIVITY 2/3a:**

**Detailed design: Specification of outputs**

**Purpose:**

**WHY?**

- Provide the detailed specification of the nature and quality of the project outputs to guide those who are responsible for doing the work on the project and managing it.
- Ensure that the specification meets the defined standards at national, provincial and local levels.

**Output:**

**WHAT?**

- Specifications that:
  - allows the internal or external people delivering the outputs to know precisely what they are expected to deliver.
  - The Project Manager to exercise proper quality control.

**Hints for Structuring the Process:**

HOW?

- Project Manager to co-ordinate the various technical inputs.
- Use of smaller technical planning groups where necessary.
- Continuous integration of the different elements of design into whole, especially if technical inputs are received from different groups.
- Technical specification is crucial to inform other details of design e.g. costing, so should be done 1st in this stage.
- Revision of detailed specification during the final stages of design e.g. if costings too high will need to change specification.
- Involvement of potential beneficiaries and other stakeholders in any major variations to the design as envisaged in initial project formulation.

**Institutional Arrangements/ Responsibilities:**

WHO?

**Project Manager**

- Co-ordinate the different technical inputs

**Project Task Team**

- Integrate the different technical inputs into a single project specification document.
- Ensure that design meets the accepted and statutory standards.

**ACTIVITY 2/3b:**

**Detailed design: Specification of inputs**

**Purpose:**

WHY?

- Provide the detailed plan of the type of input resources required.
- To make decisions on the best ways of sourcing the various inputs.

**Output:**

WHAT?

- Resourcing plan including type of resources and the approach to obtaining the resources.
- Must link technical design with most efficient and sustainable resource allocation internal to Council and outside of the Council.

**Hints for Structuring the Process:**

HOW?

- It is part of the project design specification to detail the technical inputs required.
- Assessment of whether these resources are available within the Municipality and if so, whether they can be delivered more cost effectively than by outside consultants.
- If deciding on external resources, the form of partnership (see this Manual – Section 3) and mode of selection is important.
- Preparation of a resource plan for different elements of the project and different input resources required.

**Hints for Designing the Output:**

- Define not only the resources required, and how to obtain them, but allocate responsibility within the Project Team or Council to access them at the appropriate time.
- Link it closely with specification, project time schedule, costing and financial sources and flows.
- Detail only as much as required to take the next step e.g. if responsibility for delivery of specified houses is to be contracted out there is no need to have building materials in project inputs list.
- In some projects it should involve the assessment of alternative forms of service supply (see Section 3).

**Suggested Institutional Arrangements/ Responsibilities:**

**WHO?**

<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Co-ordinate the different technical inputs on required inputs</li> </ul>
<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>• Integrate the different technical inputs into a single inputs programme</li> <li>• Co-ordinate the process to decide on best form of external accessing of resources</li> </ul>
<b>Senior Managers – Senior Politicians</b>	<ul style="list-style-type: none"> <li>• Deciding on major forms of external allocation or partnerships</li> </ul>

**Hints for Structuring the Process:**

**HOW?**

- Project Manager to co-ordinate the various technical inputs.
- Use of smaller technical planning groups where necessary.
- Continuous integration of the different elements of design into whole, especially if technical inputs are received from different groups.
- Technical specification is crucial to inform other details of design e.g. costing, so this should be done first in this stage.
- Revision of detailed specification during the final stages of design e.g. if costings are too high, the specifications need to be changed.
- Involvement of potential beneficiaries and other stakeholders in any major variations to the design as envisaged in initial project formulation.

**Hints for Designing the Output:**

- Should provide specification detail linked to the nature of the project.
- If the work is to be tendered out, ensure that the form of the outputs is sufficiently detailed and meets the requirements of tender support documentation.

**Institutional Arrangements:**

**WHO?**

<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Co-ordinate the different technical inputs</li> </ul>
<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>• Integrate the different technical inputs into a single project specification document</li> <li>• Ensure that design meets the accepted and statutory standards</li> </ul>

**ACTIVITY 2/3c and d:**

**Detailed design: Costing and financial resource allocation and flow**

**Purpose:**

**WHY?**

- To provide accurate costing on the specified project.
- To ensure that the financial resources required are available at the appropriate times and will not halt or delay the project.
- To provide an income and expenditure flow sheet for the project to assist the co-ordination between the finance section and project team.

**Output:**

**WHAT?**

- Clarity on the likely cost of all key elements of the project.
- Linking this with budgeted sources of financing.
- Alignment of the in and outflow of financing with key milestones on project.

**Hints for Structuring the Process:**

HOW?

- Costings from technical specifications.
- Linkage with available financial resources.
- Preparation of income and expenditure flow for project.
- Resolution of any discrepancies.
- Close co-operation between project team and finance section. In bigger Municipality to have a designated member of finance team linked to each project and part of Project Task Team.
- Link the Income and Expenditure Time Flow with the Project Time Flow in format that will serve as base for project management monitoring (see Integration of Project Management Information Heading).

**Institutional Arrangements:**

WHO?

<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Co-ordinate the different elements of the costing.</li> <li>• Liaise with designated officer in finance unit on project financing.</li> </ul>
<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>• Integrate the different costing elements.</li> <li>• Prepare the project expenditure and financial flows and co-ordinate the process to decide on the best form of external accessing of resources.</li> </ul>

**ACTIVITY 2/3e:**

**Detailed design: project flow chart**

**Purpose:**

WHY?

- To provide a detailed project flow chart to guide the implementation action, its management and monitoring of project and programme progress.
- To provide the necessary timetable for all the stakeholders directly involved in the project.

**Output:**

WHAT?

- Project Flow Chart highlighting all milestones.
- Linkage of this with planned information on timing of non finance resource inputs and financial expenditure and income.

**Hints for Structuring the Process:**

HOW?

- Use of specification and the Council's own time constraints and availability of finances to guide the timing and milestones.
- Consultation with stakeholders inputting resources on the availability at different times in line with the programme timetable.
- Ensure that the various agencies contributing resources have agreed to the timing and milestones.

**Suggested Institutional Arrangements/ Responsibilities:**

WHO?

<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Co-ordinate the different elements of the costing of the flow sheet.</li> </ul>
<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>• Detail and agree on the Flow Chart to guide the continued roll out of the project.</li> </ul>
<b>Other Internal Resource People</b>	<ul style="list-style-type: none"> <li>• Input on the feasibility of meeting deadlines.</li> </ul>

**ACTIVITY 2/4**

**Procuring and Contracting External Resources Required**

**Purpose:**

**WHY?**

- Ensure that all external resources are available for inputting to the project at the appropriate time.
- Ensure that external resources are contracted to deliver within the conditions of the project.
- Ensure that the contract management system for the project is in place and understood by the relevant external resource suppliers.

**Output:**

**WHAT?**

- Properly contracted external resource people and other external inputs.
- Ensured availability of these at the appropriate time in the project implementation.

**Hints for Structuring the Process:**

**HOW?**

- Following of procurement procedures
  - Preparing and signing of the contract documents
  - Briefing of contracted parties on the project management approach.
- (For further info please See Guide 6 – Section 3)

**Suggested Institutional Arrangements/ Responsibilities:**

**WHO?**

<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Manage the procurement process in accordance with Municipality's policy and procedures.</li> <li>• Responsible for contract management of external resources.</li> </ul>
<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>• Co-ordinating point for allocation and alignment of all resource inputs.</li> </ul>
<b>Procurement – Contract Management Unit (if it exists)</b>	<ul style="list-style-type: none"> <li>• Handling detail of procurement</li> <li>• Supporting project manager in contract management.</li> </ul>

**ACTIVITY 2/5**

**Integration of information into relevant management systems of Municipality**

**Purpose:**

**WHY?**

- To ensure that the detailed project design information is given to Council to guide management and to contribute to the Organisational Performance Management system. (See Manual 6 – Section 5.)

**W/r Output:**

**WHAT?**

- All key project information is integrated as baseline for management reports and monitoring progress reports.
- It is in a format that is easy to use and only incorporates the key information required – no information overload.

**Hints for Structuring the Process:**

**HOW?**

- Provision of information on standard formats
- Inputting directly into computerised systems
- Preparation of agreed management reporting system with project manager
- System in place for regular updating of progress information from project into information system.

<b>Suggested Institutional Arrangements/ Responsibilities:</b>  <b>WHO?</b>	<b>Project Manager</b>	<ul style="list-style-type: none"> <li>Ensuring availability in form for inputting</li> <li>In some instances managing inputting</li> <li>Ensuring that the schedule of management reports required is agreed as part of management information schedule.</li> </ul>
	<b>Information System Managers</b>	<ul style="list-style-type: none"> <li>Ensure that the project information is inputted in a form compatible with reporting system.</li> <li>Managing the flow of management information to the project.</li> </ul>

**ACTIVITY 2/6**
**Alignment and preparation of internal resources required for delivery**
**Purpose:**
**WHY?**

- To ensure that all internal resources of Council are available to play their part in the project delivery.
- To ensure that the part to play in implementation is clear and agreed.

**Output:**
**WHAT?**

- All the required staff and support services are in place and where relevant briefed about the project and their job within it.
- The manager of any such staff resources is aware of their involvement in the project.

**Hints for Structuring the Process:**
**HOW?**

- Agreement on the internal resources and how they will be released for the project.
- Proper project Terms of Reference for internal staff involved.
- Staff involved are properly briefed.

**Institutional Arrangements:**
**WHO?**

<b>Project Manager</b>	<ul style="list-style-type: none"> <li>Negotiate the alignment of internal resources.</li> <li>Deal with any major problems of alignment in preparation stage.</li> </ul>
<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>Co-ordinating point for the alignment.</li> </ul>
<b>Line Managers</b>	<ul style="list-style-type: none"> <li>Facilitate the allocation of staff to projects, where relevant to the project's success.</li> </ul>

**ACTIVITY 2/7**
**Finalising the format for project management for all participants**
**Purpose:**
**WHY?**

- To ensure that final project flow chart and other project management charts are finalised; and
- That all project participants are clear about the final programme and when they are to do what.

**Output:**
**WHAT?**

- Final project planning flow charts
- Properly briefed and contracted participants in project
- Properly briefed other key stakeholders including beneficiaries where they are known.

**Hints for Structuring the Process:**

HOW?

- Finalising of project flow chart
- Individual or group briefings linked to contract finalisation with external agents.
- Revision of project flow chart if necessary.

**Institutional Arrangements:**

**Project Manager**

- Manage the finalising of project flow chart.
- Managing briefing of participants.

**External Resource People**

- Contract signatories.
- Briefing to ensure that they organise their resources in accordance with project plan.

**PHASE 3**

**PROJECT IMPLEMENTATION**

**Purpose:**

- To manage the allocated input resources and project activities to ensure the delivery of the designed output within the specified time.
- To deal with any variation in inputs and outputs in a way that does not jeopardise the contribution of the project to the defined developmental objectives.
- To ensure that the project outputs are handed over for proper use or that the project, when finished, is properly closed.

**Processes:**

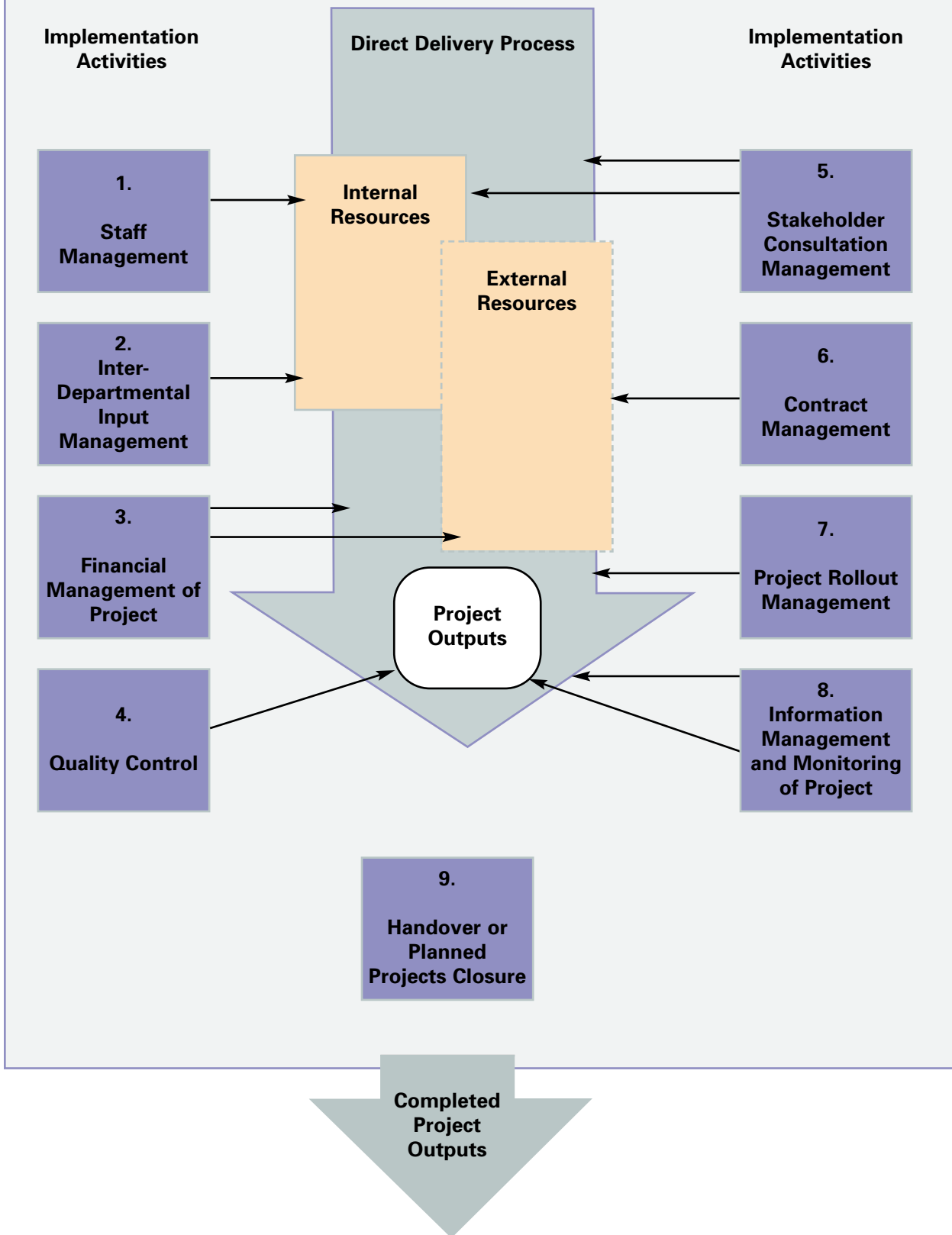
- Staff management
- Contract management
- Financial disbursement and or income receipt
- Financial accounting and reporting
- Managing resource application within time schedule
- Monitoring of key milestones
- Quality control
- Project rescheduling/resource re-allocation
- Dispute resolution
- Consultation with potential beneficiaries and other relevant stakeholders
- Hand over
- Project closure

**Outputs:**

- Project completed on time with the most effective use of the allocated resources and with outputs that match those planned as closely as possible.
- Capital outputs handed over for their use.



### ACTIVITIES PHASE 3 – PROJECT DELIVERY PROCESS



**ACTIVITY 3/1** **Staff management**

**Purpose:**  
**WHY?**

- To ensure the effective management of internal staff resources used on the project.

**Output:**  
**WHAT?**

- Effective management of all staff, both by line management and the Project Manager.

**Hints for Structuring the Process:**  
**HOW?**

- Proper briefing on project terms of reference for those involved in project
- Proper time allocation by line managers
- Regular communication sessions between project staff
- Continuous feedback by Project Manager to staff on progress and their contributions.
- Inter sectoral co-ordination through Project Task Team and strategic management team.

<b>Suggested Institutional Arrangements/ Responsibilities:</b> <b>WHO?</b>	<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Managing the staffing and proper flow of information within the project.</li> <li>• Liaising with line managers on their staff's involvement in project.</li> </ul>
	<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>• Co-ordinating the input of different staffing resources.</li> </ul>
	<b>Line Managers</b>	<ul style="list-style-type: none"> <li>• Manage their staff's availability for involvement in project.</li> <li>• Manage their contribution as part of their overall job responsibilities.</li> </ul>

**ACTIVITY 3/2** **Management of inter-departmental inputs**

**Purpose:**  
**WHY?**

- To ensure the effective management of internal inputs from different sectoral departments at the right time and in the right form.

**Output:**  
**WHAT?**

- Smooth flow of resources from different sectoral departments to allow for efficient project delivery.
- Speedy resolution of any problems involving cross-sectoral inputs.

**Hints for Structuring the Process:**  
**HOW?**

- Set up a properly functioning Project Task Team.
- Well-defined project plan available to all relevant line departments.
- Regular information on progress and adjustments to project programme.
- Structured system for resolving problems between departments.

<b>Suggested Institutional Arrangements/ Responsibilities:</b>  <b>WHO?</b>	<b>Project Manager</b>	<ul style="list-style-type: none"> <li>Managing the flow of inputs into project.</li> <li>Resolving of any blockages in flow of inputs.</li> </ul>
	<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>Co-ordinating the inputs of different sectoral units.</li> <li>Making changes to project plans in line with progress of project.</li> </ul>
	<b>Line Managers</b>	<ul style="list-style-type: none"> <li>Manage their inputs into project.</li> <li>Manage their sector department's inputs on a timeous basis.</li> <li>Assist project manager to resolve any sectoral input difficulties.</li> </ul>
	<b>Strategic Management Team</b>	<ul style="list-style-type: none"> <li>Monitor progress.</li> <li>Tackle any inter-departmental problems not resolvable at Project Task Team level.</li> </ul>

**ACTIVITY 3/3**
**Financial management of project**
**Purpose:**
**WHY?**

- To ensure that the project is managed within the defined budget.
- To ensure that the financial resources required for the implementation are available in the right form at the right time.
- Ensure that there is full accountability for the income and expenditure of the project.
- Ensure that any projected overspending or underspending is dealt with in the context of the Council's overall development programme.

**Output:**
**WHAT?**

- Proper system for budgetary control at all points of the project.
- Early identification of any potential under or overspend and resolution.
- Properly controlled system for authorising, making/receiving and recording income and expenditure flows.

**Hints for Structuring the Process:**
**HOW?**

- Integration between the project financial system and the Municipal management system.
- Project Manager to receive regular (weekly or monthly) project financial reports with relevant cost centres.
- Project Manager is the project budget manager with primary responsibility for managing the budget.
- All expenditure on project budget to be authorised by Project Manager and other designated person.

**Hints for Designing the Output:**

- Close linkage between financial management and contract management and quality control.

**Suggested Institutional Arrangements/ Responsibilities:**

**WHO?**

<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Responsible for the effective financial management of the project.</li> <li>• Responsible to liaise with the finance department on all aspects of finance.</li> </ul>
<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>• Monitor the financial management of the project.</li> <li>• Deal with any cross-sectoral financial issues.</li> </ul>
<b>Designated Financial Officer</b>	<ul style="list-style-type: none"> <li>• Liaison with Project Manager on financial matters of the project.</li> <li>• Provision of financial reports on a regular basis and in a format to permit proper management by Project Manager.</li> <li>• Ensuring that all Council financial policies and procedures are adhered to within project financial management.</li> <li>• Facilitate properly authorised payments on basis of contractually agreed forms.</li> <li>• Department's inputs on a timeous basis.</li> <li>• Assisting project manager to resolve any sectoral input difficulties.</li> </ul>

**ACTIVITY 3/4**

**Quality control**

**Purpose:**

**WHY?**

- To ensure the control of the quality of the project outputs based on the determined specifications.
- Ensure that any variations on quality specification during the course of the project are generally agreed and authorised.
- Ensuring that outputs meet any governmental quality rules and regulations.

**Output:**

**WHAT?**

- Quality of outputs meets the standards specified.
- Properly consulted and approved variations to quality of outputs.

**Hints for Structuring the Process:**

**HOW?**

- Clear specification clarified for all inputting stakeholders.
- Defined system for quality checks throughout project understood by stakeholders.
- Reporting on quality regularly, including any remedial action required.
- Taking remedial action with party responsible for below quality inputs/outputs.
- Dealing with poor quality through external and internal contract conditions.
- Final quality inspection to define snagging (on capital projects).

<b>Institutional Arrangements:</b> <b>WHO?</b>	<b>Project Manager</b>	<ul style="list-style-type: none"> <li>Responsible for the effective quality control on behalf of Municipality throughout project.</li> <li>Provision of regular quality control reports.</li> </ul>
	<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>Monitor the quality control of the project.</li> <li>Deal with any cross-sectoral quality control issues.</li> </ul>
	<b>Contracted Service Providers – Internal and External</b>	<ul style="list-style-type: none"> <li>Responsible for quality control of their specific inputs.</li> </ul>

<b>ACTIVITY 3/5</b>	<b>Stakeholder consultation management</b>
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<b>Purpose:</b> <b>WHY?</b>	<ul style="list-style-type: none"> <li>To ensure that the views of key stakeholders (including identified beneficiaries) are sought and dealt with during the delivery stage.</li> </ul>
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<b>Output:</b> <b>WHAT?</b>	<ul style="list-style-type: none"> <li>Managed relevant inputs from key stakeholders that help to improve the quality or process of the project implementation.</li> </ul>
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<b>Hints for structuring the Process:</b> <b>HOW?</b>	<ul style="list-style-type: none"> <li>Agreed system for consultation/representation using Councillors, planning forum and other local mechanisms.</li> <li>Clear communication of system with roles and responsibilities to all relevant stakeholders.</li> <li>Regular report back to stakeholders on progress and difficulties.</li> <li>Dispute resolution on issues crucial to project quality and process.</li> <li>Stakeholder involvement in final assessment of quality.</li> </ul>
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<b>Institutional Arrangements:</b> <b>WHO?</b>	<b>Project Manager</b>	<ul style="list-style-type: none"> <li>Managing the consultation and communication strategy with relevant stakeholders.</li> </ul>
	<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>Co-ordinating the stakeholder consultation/communication strategy different sectoral inputs.</li> <li>Resolving cross-sectoral issues.</li> </ul>
	<b>Local Councillors and Council Reps</b>	<ul style="list-style-type: none"> <li>Representation of relevant stakeholder views during project implementation.</li> </ul>

**ACTIVITY 3/6 External contract management**

**Purpose:**  
**WHY?**

- To ensure that the contracts with external parties are properly managed to achieve the smooth delivery of required project outputs.

**Output:**  
**WHAT?**

- Outputs are achieved as per contract.
- Council fulfils its responsibilities within the contract.
- Timeous action in the Municipality's interest in event of underperformance or non-delivery in terms of contract.

**Hints for structuring the Process:**  
**HOW?**

- Terms and conditions of contracts clearly understood by both parties.
- Regular progress monitoring and quality control.
- Feedback on this to contracted party.
- Properly defined remedial action in event of under or non-performance.
- Proper and timeous payments in accordance with contracts.

<b>Institutional Arrangements:</b> <b>WHO?</b>	<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Managing the contracts related to project.</li> <li>• Ensuring that other designated contracted managers are properly handling contracts related to the project.</li> </ul>
	<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>• Monitoring the management of all contracts linked to project.</li> <li>• Resolving cross-sectoral issues.</li> </ul>
	<b>Designated Contract Managers</b>	<ul style="list-style-type: none"> <li>• Managing the proper inputs and outputs for the contract.</li> <li>• Ensuring effective information flows on relevant parts of contract to project manager and Project Task Team.</li> </ul>

**ACTIVITY 3/7 Project rollout management**

**Purpose:**  
**WHY?**

- To ensure that the project milestones are achieved within the agreed time span of the project.
- To ensure that where there are overruns that the re-scheduling happens within the objectives and resources of the project.

**Output:**  
**WHAT?**

- Project completed within the agreed timetable.
- Project completed within a variation timetable but within resource parameters of project.

**Hints for Structuring the Process:**  
**HOW?**

- Terms and conditions of contracts clearly understood by both parties.
- Regular progress monitoring and quality control.
- Feedback on this to contracted party.
- Properly defined remedial action in event of under or non-performance.
- Proper and timeous payments in accordance with contracts.

<b>Institutional Arrangements:</b>  <b>WHO?</b>	<b>Project Manager</b>	<ul style="list-style-type: none"> <li>Managing the timing of resource inputs.</li> <li>Negotiation of any required variations.</li> </ul>
	<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>Monitoring the time flow of project.</li> <li>Resolving cross-sectoral issues with regard to variations.</li> </ul>
	<b>Designated Contract Managers</b>	<ul style="list-style-type: none"> <li>Ensuring contracted agents stick to their input timing.</li> <li>Where this is not possible ensure that the implications are dealt with across the timing of whole project.</li> </ul>

<b>ACTIVITY 3/8</b>	<b>Information management and monitoring of project</b>
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<b>Purpose:</b>  <b>WHY?</b>	<ul style="list-style-type: none"> <li>To ensure that there is integrated management information throughout the project to allow for its effective monitoring and management.</li> </ul>
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<b>Output:</b>  <b>WHAT?</b>	<ul style="list-style-type: none"> <li>Project management information that is accurate and timeously updated.</li> <li>Management reports with the right information at the right time.</li> </ul>
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<b>Hints for Structuring the Process:</b>  <b>HOW?</b>	<ul style="list-style-type: none"> <li>All key project input/output information entered into relevant management information systems.</li> <li>Regular management reports to project manager and Project Task Team.</li> <li>Use in liaison with stakeholders and input agents.</li> <li>Inputting of progress information as far as possible at source of work or action taken.</li> </ul>
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<b>Suggested Institutional Arrangements/ Responsibilities:</b>  <b>WHO?</b>	<b>Project Manager</b>	<ul style="list-style-type: none"> <li>Managing the integrity of the project management info system.</li> <li>Defining report contents.</li> <li>Using report content to manage project.</li> </ul>
	<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>Using management information for co-ordination of project.</li> </ul>
	<b>Designated Contract Managers and Support Service Managers</b>	<ul style="list-style-type: none"> <li>Ensuring the inputting of progress for use in management reports.</li> <li>Analysing and commenting on progress in their particular area of concern.</li> </ul>

**ACTIVITY 3/9**

**Handover or project closure**

**Purpose:**

**WHY?**

- To ensure that the completed project is either handed over for the next stage of its use to make it a sustainable asset e.g. completed clinic handed to Municipality's health department so they can run it
- or**
- To expand the project beyond the scope of its original plan
- or**
- To end the project having achieved the defined objectives without it being linked to any future activities of the Municipality.

**Output:**

**WHAT?**

- Completed project ready for handover for operational usage in accordance with Municipality's delivery programme
- or**
- A substantially expanded project or project of a new form evolves that is redefined as part of the Municipality's programme
- or**
- Project formally closed having achieved its objectives but having no further purpose.

**Hints for Structuring the Process:**

**HOW?**

- Final inspections on capital projects should involve key stakeholders.
- Where project output is to be used for further service delivery, ensure that all operational plans for next phase are in place before completion of first phase.
- Provision of information for review about financial organisational implications of completed project which had not previously been envisaged.
- Inputting of progress information as far as possible at source of work or action taken.

**Institutional Arrangements:**

**WHO?**

<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Managing the handover or the closure.</li> </ul>
<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>• Deciding when project set for closure or handover.</li> <li>• Co-ordinating handover or closure.</li> <li>• Managing the intersectoral aspects.</li> </ul>
<b>Receiving Departments</b>	<ul style="list-style-type: none"> <li>• Ensuring that all resources for the longer term management of outputs are in place before completion and handover.</li> <li>• Receive the handed over asset.</li> </ul>



**PHASE 4**

**PROJECT EVALUATION**

**Purpose:**

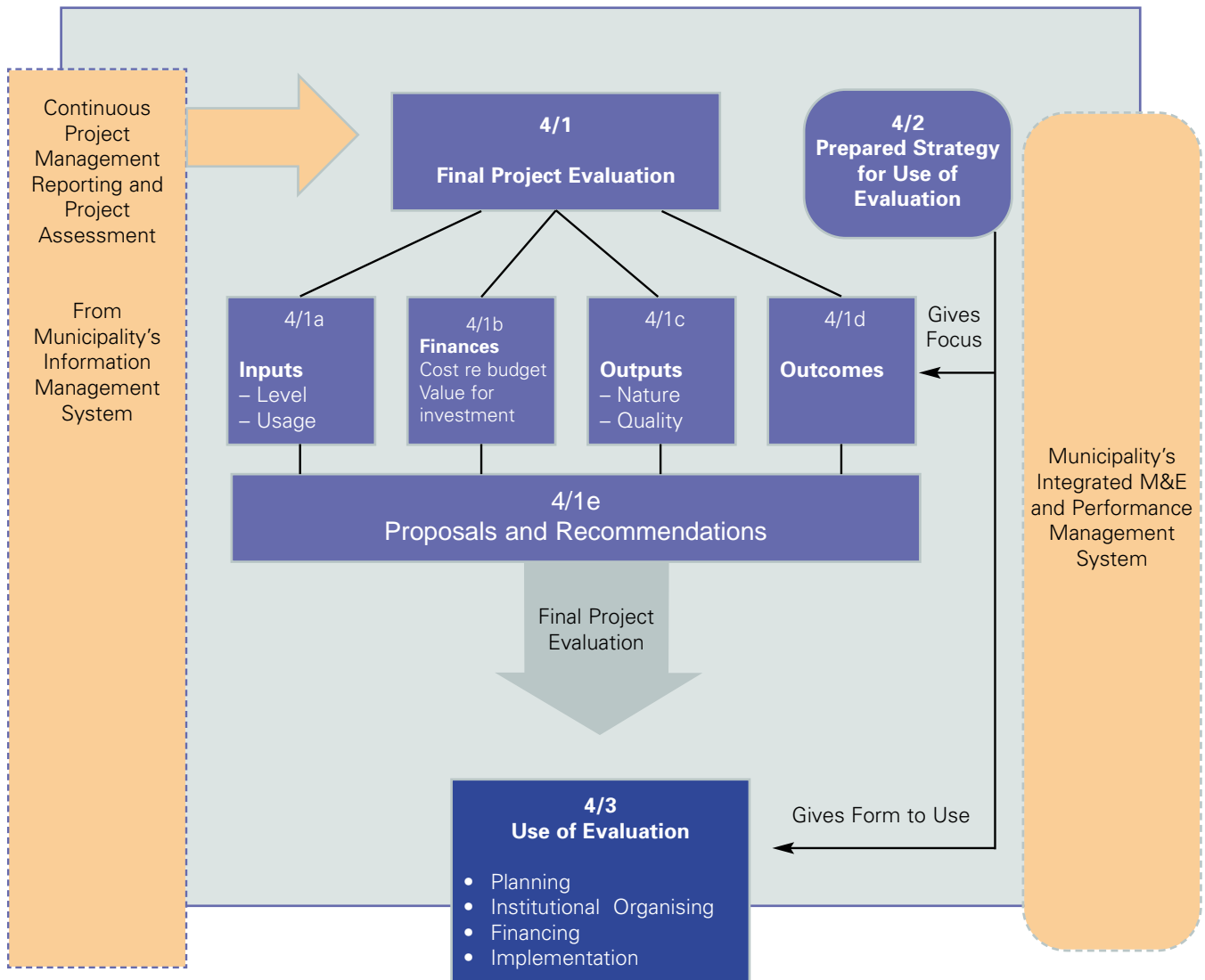
- To assess the impact that the resources and their organisation have had on the type of output and on the intended developmental objectives.
- To make recommendations as to the relevance of this to the continuing development and implementation of the Municipality's programme of delivery (see Section 5: Annual IDP Review).

**Processes:**

- Monitoring and evaluation.
- Use of project management records and information.
- Independent assessment of the outputs.
- Views of Target Population as to output and impact.
- Preparing appropriate reports.
- Feeding contents of reports in appropriate way into key future planning and implementation processes.

**Outputs:**

- Reports – short and to the point assessing the project and making recommendations.
- Strategy to ensure that the practical assessment and recommendations are used within the organisational performance management system and where relevant in the annual IDP review (see Section 5).



**ACTIVITY 4/2** **Prepared strategy for use of the evaluation**

**Purpose:**  
**WHY?**

- To define a strategy that will maximise its usefulness to the different key stakeholders e.g. funders, IDP Planning Team, planning of the report and influence its form.

**Output:**  
**WHAT?**

- A simple 1 – 2 page strategy that highlights the different users of the information and the best form to make it available.

**Hints for Structuring the Process:**  
**HOW?**

- Determine what the report is to be used for by reviewing the purposes which it must serve for different stakeholders.
- Check the form that is most useful to the key stakeholders.
- Design the amount of information and form of the report on this basis.
- Follow action plan for distribution.

<b>Institutional Arrangements:</b> <b>WHO?</b>	<b>Project Task Team</b>	Preparing and agreeing on the strategy.

**NOTE:**

People might say that this activity is merely a sub part of Activity 4/1. It is separated here for emphasis as people often prepare long unfocused reports that their target audience doesn't read because they have not given enough attention to the content and form of presentation. Attention to this can not only reduce the work required but also make the final assessment properly usable.

**ACTIVITY 4/1a** **Report and analysis on the non financial inputs**

**Purpose:**  
**WHY?**

- To define the level of internal and external inputs and how efficient they were.
- Identify any strengths and weaknesses about their use that can help in the organising of these resources in future projects.

**Output:**  
**WHAT?**

- Clear statement of the nature of resources used and how well they achieved the outputs required.
- Quality of management of the resources.
- Strengths and weaknesses.
- Linkage with financial report and cost analysis.

**Hints for Structuring the Process:**  
**HOW?**

- Consider internal and external resources separately and comparatively.

<b>Institutional Arrangements:</b> <b>WHO?</b>	<b>Project Manager</b>	• Draft this part of report.
	<b>Project Task Team</b>	• Altering and agreeing this part of report.

<b>ACTIVITY 4/1b</b>	<b>Final financial report of project</b>
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<b>Purpose:</b> <span style="background-color: #f0f0f0; border-radius: 50%; padding: 2px 5px; display: inline-block; margin-top: 5px;">WHY?</span>	<ul style="list-style-type: none"> <li>To report on the final income and expenditure on the project against budget.</li> <li>To do a cost analysis on the project outputs to help assess cost effectiveness.</li> <li>To analyse any over or under-spending to better understand the reasons for these.</li> </ul>
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<b>Output:</b> <span style="background-color: #f0f0f0; border-radius: 50%; padding: 2px 5px; display: inline-block; margin-top: 5px;">WHAT?</span>	<ul style="list-style-type: none"> <li>Income and Expenditure Report against Budget.</li> <li>Analysis of variations from budget.</li> <li>Cost analysis of the outputs re the targeted use.</li> <li>Assessment of the financial management systems and controls.</li> </ul>
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<b>Institutional Arrangements:</b> <span style="background-color: #f0f0f0; border-radius: 50%; padding: 2px 5px; display: inline-block; margin-top: 5px;">WHO?</span>	<b>Designated Financial Officer</b>	<ul style="list-style-type: none"> <li>Prepares financial statement and draft analysis.</li> </ul>
	<b>Project Manager</b>	<ul style="list-style-type: none"> <li>Reconciles draft report and adds comments.</li> </ul>
	<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>Reconciles draft report and adds comments on analysis.</li> </ul>

<b>ACTIVITY 4/1c</b>	<b>Report on outputs</b>
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<b>Purpose:</b> <span style="background-color: #f0f0f0; border-radius: 50%; padding: 2px 5px; display: inline-block; margin-top: 5px;">WHY?</span>	<ul style="list-style-type: none"> <li>To detail the actual achieved outputs type, amount and quality against the designed outputs.</li> <li>To assess any variation in order to assist in better planning and implementation in the future.</li> </ul>
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<b>Output:</b> <span style="background-color: #f0f0f0; border-radius: 50%; padding: 2px 5px; display: inline-block; margin-top: 5px;">WHAT?</span>	<ul style="list-style-type: none"> <li>Clear statement of Outputs:             <ul style="list-style-type: none"> <li>– Type</li> <li>– Number</li> <li>– Quality</li> </ul> </li> <li>Analysis of any variations from original specification and implications to Municipality.</li> </ul>
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<b>Hints for Structuring the Process:</b> <span style="background-color: #f0f0f0; border-radius: 50%; padding: 2px 5px; display: inline-block; margin-top: 5px;">HOW?</span>	<ul style="list-style-type: none"> <li>Could involve inputs from targeted potential users or users of project outputs.</li> <li>Important to link with the organisational performance management system (see Guide 6 – Section 5).</li> </ul>
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<b>Suggested Institutional Arrangements/ Responsibilities:</b> <span style="background-color: #f0f0f0; border-radius: 50%; padding: 2px 5px; display: inline-block; margin-top: 5px;">WHO?</span>	<b>Project Manager</b>	<ul style="list-style-type: none"> <li>Prepares draft report.</li> </ul>
	<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>Finalises report.</li> </ul>
	<b>Specialist Technical Inputs</b>	<ul style="list-style-type: none"> <li>Where this is necessary for some outputs. Should have had this specialist input during quality control part of Project Management.</li> </ul>

**ACTIVITY 4/1d** **Report on outcomes**

**Purpose:**  
**WHY?**

- To provide any indicators of outcomes that has emerged during the project implementation for use in longer-term outcome assessment.

**Output:**  
**WHAT?**

- Report on any factors that demonstrate the outcomes of the project, either positive or negative, against the identified objectives.
- Ensure that these are fed into the correct management system and Annual Review of IDP (see Section 5).

**Hints for Structuring the Process:**  
**HOW?**

- Arising from the interaction with users on the project.
- Interaction with other key outcome factors during project e.g. environmental.
- Feed in to longer term outcomes to Organisational Performance Management system and where relevant to the Annual IDP Review (see Guide 6 – Section 5).

<b>Institutional Arrangements:</b> <b>WHO?</b>	<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>• Prepare report from experiences on projects and linked interactions.</li> </ul>
	<b>Specialist Technical Inputs</b>	<ul style="list-style-type: none"> <li>• Where this is necessary for some outputs. Should have had this specialist input during quality control part of Project Management.</li> </ul>

**ACTIVITY 4/3** **Using the evaluation**

**Purpose:**  
**WHY?**

- Combine the review/assessment with the strategy for its use to ensure that it has greatest impact in informing:
  - Planning
  - Financing
  - Future organisation of implementation
  - Improvements to cost benefits of delivery

**Output:**  
**WHAT?**

- Clear well structured report with key issues highlighted for different recipients, distributed to the following:
  - Strategic management team
  - M&E Officer
  - IDP Manager
  - Financial Manager
  - Relevant council committee
  - External funders
  - Planning forum
  - Relevant provincial and national government offices.

**Hints for Structuring the Process:**

HOW?

- Structure should come from the strategy document with respect to interests of stakeholders and time they have available.

**Institutional Arrangements:**

WHO?

<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Managing the distribution of the review and embedding in other processes.</li> </ul>
<b>Project Task Team</b>	<ul style="list-style-type: none"> <li>• Assisting in the distribution and highlighting of relevant parts of review particularly w/r to sectoral involvement.</li> </ul>
<b>Strategic Management Team and Line Managers</b>	<ul style="list-style-type: none"> <li>• To receive report and plan any necessary follow up action arising from report.</li> </ul>
<b>M&amp;E Officer</b>	<ul style="list-style-type: none"> <li>• Integration of the assessment report into the Municipality's broader M&amp;E programme.</li> </ul>

**C. INFORMATION**

**1. INTEGRATED INFORMATION AND COMMUNICATION SYSTEM FOR GOOD PROJECT MANAGEMENT**

Section 2 considered the purpose and importance of good information and communication systems in supporting the management of implementation. In Section 3 we dealt with the financial management information support for project management.

There are two systems that are crucial to the effective project management of implementation:

- Project Management Information System
- Project Communication System

**Project Management Information**

Effective project management is dependent upon the availability of up to date information on progress with inputs used and outputs achieved.

At the same time it is the source of information that is also required at other points in the Council management system.

So it is a crucial juncture of supply to and sourcing from the Municipality's management information systems in the implementation cycle.

**Communication**

The implementation of most projects involves complex interactions between people with different responsibilities and different motivation for their involvement:

- The contractor will build the houses because he wants to earn a profit and maintain the reputation of his company in order to obtain future work.
- The designated financial officer wants to make sure that nobody misuses the finances.
- The engineer is concerned to ensure that the installed infrastructure meets standards.
- The housing officer wants the tenants housed as quickly as possible as they must vacate the land where they are presently settled.

Although their inputs might appear to them as a discrete action they are dependent upon and effects each other.

- Integrating this diverse range of activities and purposes and maintaining its focus on the designed outputs, requires not only information but also an effective but streamlined communication and decision making system. This must function well both within the project and in relation to the project's broader environment.

For successful project management of implementation **the Municipality** must ensure that it has in place an integrated management information system and a defined system for communication and decision-making.

**Each project** must have effective linkage into the Municipal system but also ensure that it has properly designed matching systems for the gathering, processing and distributing of relevant information and an agreed system for communication between its participants.

## PROJECT MANAGEMENT INFORMATION SYSTEM (PMIS)

<b>Why?</b>	<p>To ensure that:</p> <ul style="list-style-type: none"> <li>it has the information it requires in a timeous way to manage all aspects of the project; and</li> <li>that people in other parts of the organisation have the information they require to monitor and assess the projects and integrate into the monitoring of programmes and overall implementation of the Municipality.</li> </ul>												
<b>What information?</b>	<p><b>What type?</b></p> <p><b>Financial</b> – Budget, income expenditure and progress compared to projected spend.</p> <p><b>Performance</b> – How well are the various inputs performing against the requirement of the project plan particularly completion against milestones?</p> <p><b>Quality of Product</b> – Information about the quality of the products delivered at all stages of the project.</p> <p><b>Contract Management</b> – Key responsibilities, outputs, payment schedules and payments made, committed and remaining.</p>												
<b>Linking of information to existing project baseline information and key performance indicators?</b>	<p>A good statement of the baseline against which much of the project monitoring measurement is done are the key project specification and planning documents.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="width: 50%;">Budget and Income and expenditure flow projections</td> <td style="width: 50%;">Financial spend and income with variation against budget projections</td> </tr> <tr> <td>Project flow chart with milestones</td> <td>Delivery performance w/r timing</td> </tr> <tr> <td>Project specifications</td> <td>Quality control on the outputs</td> </tr> <tr> <td>Resource allocation plan</td> <td>Use of non-financial resources</td> </tr> <tr> <td>Contracts</td> <td>Range of key outputs necessary for proper management of project contracts</td> </tr> <tr> <td>Key Performance Indicators</td> <td>Relevant KPI's not included in the above</td> </tr> </table>	Budget and Income and expenditure flow projections	Financial spend and income with variation against budget projections	Project flow chart with milestones	Delivery performance w/r timing	Project specifications	Quality control on the outputs	Resource allocation plan	Use of non-financial resources	Contracts	Range of key outputs necessary for proper management of project contracts	Key Performance Indicators	Relevant KPI's not included in the above
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<b>How much?</b>	<p>Only the information that permits proper management of the project. Assess carefully what this information is before collecting it and designing report formats. It is also necessary to check whether other levels in the Municipality require additional information to be gathered during the project.</p>												
<b>Who should collect and input the information?</b>	<p>This depends upon the information and the systems in place. The financial information is in most instances inputted by the financial section in the course of their management of the finances. Then what are needed are appropriate project financial reports.</p> <p>Progress on delivering projects – Inputs from the office of the project manager as s/he is in the best position to know progress.</p> <p>Contract management – Integration of financial information and progress on delivery.</p> <p>Quality of outputs – Depending upon who does the necessary quality control. Likely to be within the project team.</p>												

<p><b>Format of Information System</b></p>	<p>This will depend upon the resources of the Municipality. A fully integrated system that links information about finance to the project flow chart, the Contract Management system etc with standard systems for inputting data is most useful, if the technology is properly supported and there is suitably skilled staff.</p> <p>However, it is seldom like this – there is usually a number of separate information systems some computerised and other manual.</p> <p>In such situation the project manager will need to determine what information s/he requires and how it will be brought together into a single project management information system. Important to this are the forms of reports required.</p>
<p><b>Management Reports for Projects</b></p>	<p>The Project Manager needs to determine what information is required and when to properly manage.</p> <p>S/He can then negotiate the available reports through the existing information systems or structure specific report formats for the project.</p> <p>It is much easier when reports are taken directly from a system functioning across the Municipal programme as it helps to reduce the amount of inputting and also to adjust report format and content for different levels of the organisation.</p>
<p><b>Extrapolating project management information at other levels in the organisation</b></p>	<p>Where there is a properly integrated and computerised system it is possible to take out relevant information from a project and add it to similar information about other projects. This creates programme information systems. Usually the stress is on refining the amount of information required but gathered from a wider base.</p> <p>Where there is not a high level of integration between reporting at different levels or across systems then more effort must be made in manual integration.</p>
<p><b>Management of project management Information system</b></p>	<p>Ideally it should be standardised across the Municipality. In such a case there would be a manager with responsibility for the development and management of the system as a whole. This would entail levels of standardising project planning formats while allowing for some diversity between projects.</p> <p>The Project Manager on each project is then responsible for planning the specific diversity of his/her project and for identifying the source of the information and either accessing it through a different reporting system to the standard or designing simple ways for collecting the information.</p>
<p><b>Is there a difference between monitoring and evaluation system and the Project Management Information System (PMIS)</b></p>	<p>Yes but there are many points of overlap. The Project Manager supplies the information required to directly manage the implementation of the project. It relies far more on monitoring to ensure that implementation runs to plan. It evaluates only in so far as it helps to improve the immediate pace and quality of delivery.</p> <p>Monitoring and Evaluation is a more long-term attempt to assess overall ways of improving inputs and input management output and output quality and outcomes. The latter is particularly difficult over the implementation life of most projects.</p>

## PROJECT COMMUNICATION SYSTEM (PCS)

<b>Why?</b>	<ul style="list-style-type: none"> <li>• To ensure that all the different participants in the project have the information to know when and what they must do in order to achieve common objectives and how it links with the other activities and inputs.</li> <li>• To ensure resolution of any problems and confusion that inhibits the implementation of the project.</li> <li>• To ensure that the project is linked with other parts of the Municipality and other parts of the environment that will assist its implementation responsibilities.</li> </ul>
<b>How?</b>	<p>Systems that provide for a continual flow of relevant information through the following means:</p> <ul style="list-style-type: none"> <li>• Written project reports (do not need to be long!)</li> <li>• Meetings (large and small, short and shorter)</li> <li>• Briefings</li> <li>• Site meetings</li> <li>• Workshops</li> <li>• Informal conversations</li> <li>• Inspections</li> </ul>
<b>When?</b>	<p>The communication must happen continuously throughout the duration of project and between all participants. The important balance to achieve is enough communication opportunity to enhance the delivery and not so much that people have too little time to implement.</p>
<b>Clarity on structure and purpose of the elements of the communication system.</b>	<p>It is important to understand the purpose of each element of the communication strategy, and that the participants in it understand what it will achieve in assisting implementation. Particularly important is to avoid meetings and such sessions that bring together project participants but do not contribute to the speed or quality of information.</p>
<b>Internal and external communication feed and strengthens each other.</b>	<p>Communication only among internal project participants weakens the project. The project communication network must extend to other levels of management, the political structure and other external stakeholders.</p>
<b>Who is responsible for developing and managing the communication system?</b>	<p>The Project Manager and the Project Task Team (PTT) have core responsibilities for this. Although the PTT is the major hub of communication in the project, it is also involved in structuring the overall communication strategy. The Project Manager carries major responsibility for defining the communication needs and lines and using them.</p>

### REFLECTION BOX?

#### Good Project Management at the Heart of Effective Implementation

Even if your Municipality had an excellent IDP and thorough Institutional Preparation, it still requires sound project management skills to make implementation work at the point where delivery is required.

There is no magic to Project Management. It requires committed and disciplined organisational skills. It brings together the right sources at the right place at the right time.

If your Municipality doesn't have access to these skills then you must ensure that they obtain or develop them.

Project Management is the heart that makes the delivery happen using all the other preparation.