Visual Guide

"How to improve Project Management in Organizations"

Maike Wischmann
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Welcome to this visual guidebook. My name is Mrs. Maicoach, I am an advisor and I will show you some essential instruments on how to improve your project management.

This collection of useful instruments for managing projects was developed based on real experience in the field when I advised NGOs in Laos. These tools provide basic knowledge needed to plan, implement, monitor, analyze and report a project effectively.

For you as advisors, you will also find some useful process descriptions on how to facilitate the improvement of institutions/organizations. There are many common issues and challenges faced by all Non-Profit and Non-Government Organizations and these organizational issues can impact on the effectiveness of their programs/projects. As advisors, you will have to identify both the successes and the gaps of the organizational management and the program management structures and systems as these are inter-related. You will have to simultaneously help address gaps in both the institutional management and program management systems in order to have positive and sustainable impact.

For project managers, this handbook will show you how to practice and improve certain basic project management skills and use simple project management instruments. Learn and practice with Mrs. Maiproject and she will show you how project management can be effective and fun!

Hello, my name is Mrs. Maiproject, and I am a Project Manager. My project was not running very well. But when I started to learn how to use some of the simple project management instruments illustrated in this handbook and applied them to my projects, my work became more effective and successful.

This visual guide is great and easy to follow and takes you through an entire project cycle! Use the checklists and visuals and practice the processes step by step. You will find me in the visuals. I show you what to do and remind you about essential issues, and you will find that managing projects is not so difficult after all. Please follow me......
Introduction

Dear Reader,

In the development sector most organizations operate with projects, which are funded by international donors. These Non-Profit Organizations or Non-Government Organizations in Development Countries often face difficulties to meet the expectation of international standards for project management, monitoring, reporting and communicating.

This is the reason some of us are working as international or local advisors to assist organizations to improve their management and operational structures.

In 2007-2010 I was assigned by the German Development Service, DED, to advise a local organization called PADET (Participatory Development Training Center) in Laos in Human Resource Development and Organizational Development. During this time I trained and coached PADET’s Middle and Center Managers in a special designed long-term in-house Management and Leadership Training Course. My work at PADET led me to appreciate the usefulness of working more with visuals to transfer abstract management knowledge.

I wrote this book especially for people working as “Advisors” to support organizations or institutions, and to share my experience with them. I also wrote this book for Project Managers to help them gain an overview of the concepts, principles and procedures of project management and how to apply these to improve the effectiveness of their projects.

The Advisors can learn from my experience to gain better understanding of the dynamics of organizational culture and change processes, and how to move towards improving organizational management and development. You will see, that I have to assume several roles.

The Project Managers can also use this book as a training handbook for Project Management and Leadership.

My intention is to create a user-friendly, but informative booklet, which is nice to look at and which can be a quick reference, if you are going to use the tools yourself. Look first at the pictures, then read the text for more information, then follow the bullet points and checklists and read more about it in the mentioned Internet addresses.

All tools recommended in this book were successful implemented in PADET and so I can say that this book is a collection of best practices for organizational management and change, and growth towards professionalism and excellence.

In working with other Non Profit Organizations, I find that they often share similar challenges and commonalities for organizational improvement. I recommend that you use this guide and follow the 13 steps explained in the book, I am certain that your project management will improve and you will find your work more enjoyable.

Special thanks to Shui Meng and Sombath Sonphone for ideas and editing, and all of PADET staff for their active learning and feedback. To DED and my colleagues who supported me in the writing of this book, I also say “thank you”.

I am also interested in your opinion and experience. For your comments and feedback or to share your experience, please send me an email: maike.wischmann@goldmail.de.

Have Fun and Good Luck for your Projects!
Maike Wischmann
Overview about the Project Cycle

Orientation and Integration
Before you start your work as an advisor you have to understand the organization/institution’s management and operational systems and the projects it manages. For the project manager, he/she is usually a member of the organization/institution. To enhance institutional and project effectiveness, the advisor and project manager(s) have to understand the organizational and program/project context and work together as a team. Both the advisor and project manager need to jointly understand and learn together and analyze the institutional context and program/project situation and collect information. This may take time but it is necessary to start the planning process.

Project Planning:
This is the thinking and theory part. The planning process consists of different stages. You have to understand the problems, the situation and the context in which the organizations and projects operate. You have to identify and agree on the objectives and output you want to achieve. If this thinking process is finished you can work out the activities which can help lead to the desired achievements. The Objective framework is the logical construct and the Work Plan is the operational instrument.

Project Implementation:
This is the “doing” part on the operational level with the project staff implementing the planned activities to reach the expected outputs and outcomes. To coordinate the implementation of activities and to monitor the process, you need to communicate a lot! Meetings and review sessions are most very important for communication. The project team and staff needs to be supervised, updated and motivated.

Project Monitoring and Evaluation:
This is the validation and reflection part. This is the step that can help you know whether you are on the right track? To do this you will need specific data about the project, regularly field visits, and interviews with the target group so that you have concrete evidence that your activities are running smoothly and are benefiting the target groups and leading to the expected outcomes. In this stage you will need good documentation and good recording and filing systems.

Project Analysis:
This is the analyzing and conclusion part. Whatever data you have, they will need to be analyzed and reflected to give you better understanding of the problems encountered and help you review options and alternatives, and come to decisions on actions to resolve problems. Some problems need deep analysis and may even lead you to change your strategies and make a new work plan. This means going back to the planning stage and reanalyzing the issues and coming up with a new set of activities... This reiterated process of planning, implementation, monitoring and evaluation, and analysis goes on in a circular motion and is key to the project cycle process.
# Table of Content

## Overview about the Project Cycle
- Planning Process
  - Orientation and understanding the situation and context through mapping and visualizing
  - SWOT Analysis: From the situation to the strategy
  - Action Planning Workshop
- Project Implementation
  - Meetings and Workgroups - Facilitation of Result based Meetings
  - Capacity Building – Increasing Project Management Skills and Leadership
  - Staff Management with Feedback Interview
- Project Monitoring and Evaluation System
  - Project Monitoring and Evaluation System
  - Quarterly\ Midterm\ Annual Review for Monitoring, Evaluation and Organizational Learning
  - Project Monitoring Field Visit with Focus on the Outcome
- Project Analysis and Reflection
  - Quarterly Reports
  - Project Analysis: From the Problem to the Objective
  - Problem Solving with a Reflective Team Session
  - Success Stories
- Glossary
Orientation and understanding the situation through mapping and visualizing

1. The advisor meets the counterpart and listens to the information about the project/organization in general. Build up slowly a trusting, respectful relationship!

This is still confusing! I need more information.

Great. interesting...

Small talk... what we do...

2. Draw your own mind map to have an overview and understand situation and complexity... (identify gaps, where do you need more information, interviews with others needed?)

3. Try to find out who are the stakeholders of the project and how is the relationship and coordination (alone or with counterpart) How is the network? Who is important? Who is powerful? Where are conflicts?

This is complex.

Stakeholder Mapping

4. Develop different visualizations with the counterpart, for example, an organizational chart, a work flow diagram, a project chart (resources, people, structure, processes, method, infrastructure...) What are the priorities? What is most urgent?

Organisation

Work Flow

Network Diagramm

Does it look like this?
Yes...
No...
more like this...

5. Share, check and feedback the mind map or information with the counterpart and identify key problems......

What do you think?

FEEDBACK PRESENTATION

This need to be added. That is a big problem.

6. Finally all this visualizing should help you understand the project organization and get a first impression where to start......

I slowly understand the whole situation.

Is the counterpart ready for concrete actions? Then it is time for the first workshop...
Orientation and understanding the situation through mapping and visualization

For the Advisor: What is the role of the Advisor?
When you just arrived as an advisor to an organization, your main task will be to get an overview of the organization, its staff, its working culture, and the specific programs and projects the organization is involved in. Further you need to establish a good working atmosphere with the staff and develop a trusting relationship. For this period, developing a mind map would help you to organize the situation even though you may not completely understand the entire context yet. A map of the stakeholders, for example, will help you to understand the organization's social circles, networks, and power structures and relationships. A program/project map will help to get more insights into the program/project structures and how they relate to each other.

All maps can be used for your own analysis, and can be the basis of discussion with the management staff and project staff. Once the initial mind maps, diagrams and charts are developed and discussed, they can be clarified and refined together with participation of staff and gives the advisor the opportunity to ask more questions. In clarifying the organizational and program context with concerned staff, the advisor is already stepping into the counseling role and helps stimulate organizational reflection and analysis. Using mind maps, pictures, and charts to talk about organizational and program contexts is also more visual, more user-friendly, less abstract, and less threatening.

As an Advisor, your role in this is to use the hand drawn mind maps, diagrams and charts to stimulate the project partners to validate and clarify issues, contexts and problems. This means, your role is to listen, elicit information and seek explanations and bring out the whole picture through visualizing together with the partners. The advisor during these sessions is also a learner while at the same time helping to counsel change consultatively and objectively.

Summary of procedures to understand the situation

- The first stage of integration of an advisor into the organization is listening to information and opinions of staff, and screen documents. At this stage, it is important to understand that while you want to know your partners, your partners are also observing you and your working style.
- Draw your own mind map to create an overview of the organizational and program/project structure. Refine the mind maps and diagrams by talking to management and rank and file staff; attend meetings, and also visit the field to understand the nature and context of the organization's work.
- Organize a clarifying and visualizing meeting with key management and project staff to present your mind maps, organizational chart, work flow charts, project charts to have clarity and understanding of the current situation and identify key areas of change and improvement. This is an important step and should be handled in a consultative and participatory manner and in an open way.
- Identify what are some key actions need to be taken. It is important at this stage to secure some basic commitment or mutual contract as to where and what to start working on, what to review, and what to change.

What are some traps and tricky situations?
For an advisor, the integration into another culture or organization can be a real challenge. First, not all information is available or provided at the beginning. Second is the issue of trust, both for the advisor and for the organization. For both it will take time and patience. Both sides have to come together and establish a way of mutually working with one another and respecting one another. Hence, it is important to commit to a plan to work together and to show tangible results of improvement. As an advisor it is more important for him/her to adapt to the culture and working environment of the advisee than vice-versa. This is where the application of mind maps can be useful as “a picture says more than a thousand words” and a powerful tool to overcome language barriers.

More information:  www.thinkbuzan.com  
www.mindmap.com  
www.google.com/images (mind maps and visualization)
1. What are the different steps of a SWOT analysis Workshop?

I have to explain my staff the process steps:
1. Explain the SWOT tool
2. Clear objective
3. Group work: write and discuss cards
4. Presentation: clustering and heading
5. Priorities and strategy
6. Key actions
7. Follow up

3. Participants work in groups, discuss and write cards for all 4 areas......

Create a constructive group atmosphere

Now the process of sharing and discussion is most important!

5. The headings need to be prioritized...

Each participant has five points to mark his/her priorities!

6. Identify and agree on strategy!

How to strengthen the strengths?
How to weaken the weaknesses?
How to use the opportunities?
How to reduce the threats?

<table>
<thead>
<tr>
<th>HEADINGS</th>
<th>ACTION TO DO</th>
<th>WHO?</th>
<th>WHEN?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority 1</td>
<td>Action</td>
<td>Action</td>
<td>PT</td>
</tr>
<tr>
<td>Priority 2</td>
<td>Action</td>
<td>Action</td>
<td>ST</td>
</tr>
</tbody>
</table>

I think we have to do this......

RIGHT...

Agree and assign key actions!

2. Is the objective clear, what to analyse and does everybody understand the guiding questions of the SWOT Matrix?

The topic of the analysis must be clear and specific!

4. After the presentation the group cluster the cards and write headings for each cluster.

Let's find headings for each cluster!

7. Documentation and follow up with the assigned task!

When will be the next meeting?
SWOT Analysis Workshop

Why is a strength weakness analysis useful to develop the strategy?
The context of the organization and the situation and progress of the program/projects have to be analyzed together with the responsible staff before you can plan appropriate interventions. The SWOT Analysis, which is well-known in development work, is therefore a handy instrument to do this.

The four key questions of the SWOT Matrix are: What are the Strengths? What are the Weaknesses? (internal factors) What are the Opportunities? What are the Threats? (external factors). These questions allow the participants to share their opinions and to reflect their situation. After completing the SWOT matrix, the group needs to group, name and prioritize the issues in each of the SWOT sector. Then, the staff will need to strategize what priority to work on based on the agreed strengths and weaknesses, and balancing the opportunities and threats. The strategizing exercise once more allows the group to share opinions and reach consensus on the strategy. A work plan can then be developed jointly to address the identified priority issues.

For the Advisor: What is the role of the Advisor?
The advisor together with the responsible managers facilitate the SWOT workshop. Organizing a SWOT workshop is an important intervention for managing change. Prepare your own SWOT and think about critical topics and issues which might come up.

For the Project Manager: What the Project Manager needs to know!
Procedure of a SWOT Workshop
Pre-Workshop: Preparation
- Invite all relevant participants
- Ensure that the objective of the SWOT Workshop is clearly communicated

During the Workshop: Facilitation
- Introduce the Agenda and objective of the workshop
- Introduce the SWOT tool and different steps of the SWOT workshop
- Make sure that everybody understands the SWOT Matrix

Work on the analysis, filling out the SWOT Matrix
- Divide the participants into groups: ask them to write out cards for each of the sector of The SWOT Matrix – making sure that participants understand the meaning/concept of each of the sector of the matrix
- Cards of all groups will be pinned in the main chart
- At the Plenary, the cards will be reviewed and meaning clarified, and clustered together.
- Each cluster is given a name or heading
- The participants will vote on the priorities of the different clusters

Work on the strategy, which are necessary key actions to move forward
- Discuss and arrive through consensus at 3-5 key issues to be addressed by the organization (project as a whole)
- Discuss and write down on cards actions needed to address each of the issue. The action cards then form the basis for developing an action plan

Post-Workshop: Documentation and Follow-up
- Document the results of the analysis, the issue clusters, the identified key issues to be addressed, the strategy, and the action plan
- Ensure that this document is communicated to all participants, and meetings are held on how to follow-up the action plan.

What are some traps and tricky situations?
If you do a workshop with participants who are not used to reflect or to analyze, they may become exhausted or lose energy quickly. Hence it is important to observe the reaction of the group and to factor in adequate breaks. Hence, make sure that you explain the terms “Strengths and Weaknesses” and “Opportunities and Threats” in easy-to-understand language. Hence, you might ask questions like “What is running well? What do you want to improve?”, instead of terms like “Strengths and Weaknesses”. Feel free to improvise and focus on the process.

Action Planning Workshop

Before you start planning, get a briefing about the strategy ........

1. Set the context: What is the objective of this planning workshop?

2. Visioning: The Victory Circle: A dream of the future: How does the future look when everything is achieved?

We are famous for our quality!

We are a great team!

Agreement: If you compare the vision with reality: What can be realistically achieved, what are the objectives, the team can commit to each other. Which objective is most important?

our agreements = our objectives

3. Analyzing: Back to reality: Where are you right now? What kind of challenges do you face? What strengths do you have? Who benefits from this project? Are there risks to worry about?

My project team becomes stronger through this workshop!

4. Agreement: If you compare the vision with reality: What can be realistically achieved, what are the objectives, the team can commit to each other. Which objective is most important?

Current Reality

Strengths Benefits
Challenges Risks

5. Actions: What kind of actions are needed to achieve the objectives? Split up in work groups for each objective and write Action Cards.

This must come first.....

All these actions lead to the achievement!

6. Sort and order the actions into the calendar!

7. What is the evidence of the achievement (output)? How do the beneficiaries benefit from this (outcome)?

...too much at one time! Let’s review the plan!

8. Who will be responsible?

This is my job!


We have done it!
Why is Action Planning crucial?
Action Planning is a powerful tool for developing the annual work plan of a project. Action Planning allows the whole project team to create a shared vision, builds strong team commitment and develops an agreed work plan with clear outputs to guide implementation.

The workshop works through 8 steps of planning and will take 1-3 days depending on the size of the project. First all participants need to agree on the context of the workshop, what to achieve, and why this is necessary. The Workshop starts with creating a vision for the project by projecting into the future and the kind of objectives you want to reach. This visioning provides the group to open up and tap on their creative and positive energies. The next step is to look at the current reality. What are the strengths, what are the challenges, what kind of risks can occur. Lastly the participants also need to think about the benefits of the project? (Which must be linked to the outcomes of the project) Who will benefit directly from the project? Who will benefit indirectly from the project? How many will benefit?

Reviewing dream and checking with the reality will help the team to establish realistic and achievable objectives and how to go about achieving them as individuals and as a team. They will also use the analysis to help them prioritize their objectives. By working systematically through each objective, the team can then list out what actions are required to achieve each objective. Working with a calendar, the actions can be set in a logical and time-bound order: what must come first; when should this happen; and who should be responsible; and what are the expected outputs and outcomes, how to monitor and what evidence (indicators) are needed; how do the beneficiaries benefit or change from the project, etc.

Such action planning exercise has to be done systematically and must involve the whole team – there will be a lot of discussion, a lot of negotiation, a lot of reflection, and some uncertainty and fear. It will be an investment of time and energy well-worth spending and will provide the frame (or road map) to guide the work of the project team for the year.

For the Advisor: What is the role of the Advisor?
Either arrange for a facilitator or do the workshop yourself. The facilitator must be briefed before the planning workshop by the senior manager in order to understand what the context is, what the project aims to achieve, and whether there is a project proposal already agreed with the funders. The facilitator must have all these documents in order to ensure that the resulting action plan will match with the project proposals objectives, indicators, outputs and outcomes.

For the Project Manager: What the Project Manager needs to know!

Procedure of Action Planning Workshop:
Before the workshop: The workshop design, including the objectives, strategies are agreed by the Senior Manager. The whole project team must attend this workshop to ensure that they will work as a team.

During the Workshop:
- Set the context about the objective of the plan: what, why, when, who, how, where.
- Victory Cycle: Create a vision/dream: If you have achieved everything in your project, what will the situation be like?
- Current Reality Cycle: Back to reality! Where are you now? What are the strengths, challenges, risks?
- What are the benefits? Who benefits?
- Agreement: the team commits to work on relevant key objectives; agree on teamwork principles, set priorities for the project for the year.
- Divide the participants into groups and work on actions (activities) to achieve the objective.
- Fill in the activity calendar. What activities are to be done by when? Is it achievable and realistic? Are the actions/activities well-spread out over the year?
- Who is the responsible person for each activity (group of activities) under each objective?
- What is an indicator that the objective/output is achieved?
- What is the evidence that beneficiaries will really benefit (outcome-level)?
- Final review and agreement of the activity action plan. Done? Great let’s celebrate!

After the Workshop:
- The activity plan becomes the work plan of the project team and will be approved for implementation by the Senior Manager. It will be kept on file for reference and for regular monitoring.

What are some Traps and Tricky Situations?
Participants who are not experienced in project planning often get lost in details and do not see the whole picture or the goal of the project. They also often get confused by terms: objectives, indicators, input, output, outcome, etc. To overcome such confusion, the advisor needs to give simple example and use easy to understand language. To sustain positive energy, constantly remind participants of their vision throughout the whole workshop. Get the whole team involved! More information: www.civicus.org, www.businessdictionary.com
Facilitation of result based Meetings

1. Start: Present the collected topics and ask for priority and additional issues ...

2. Review old topics: How about the last agreements, what is done, what needs to be followed up?

3. Work on new topics: listen to the discussion, summarize and write the key words in the structure ......

4. Stay focused and keep track: The facilitator guides concentrated through the process of decisions and keeps the time.

5. The facilitator has to observe the group dynamics and atmosphere and should encourage quiet people to share.....

6. Summarize and wrap up the session: Is everything clear?

7. Take photo of the plan or take minutes... See you in the next meeting!!
Facilitation of result-based Meetings

Why are result-based meetings necessary?
Meetings are an organization's core management instruments for communication and information during the project implementation. Relevant stakeholders exchange opinions, discuss issues or review progress of project and work plans in these meetings. However, often meetings have no clear objectives, are not properly planned and do not have good follow-up actions, thereby making meetings a waste of time. Hence meetings should be managed better to become effective and achieve results. To be useful all meetings should be appropriately planned and agreed actions should be followed through and completed or delivered within an agreed timeframe and be reported on.

For the Advisor: What is the role of the Advisor?
Once a trusting relationship is established, the advisor can help the organization to develop more professional processes in planning and managing meetings as part of good project management and organizational improvement. The Advisor has to be flexible in his/her roles. The advisor needs to take on the role of an “interested Listener” to understand situation and perspectives of the different stakeholders. He/she also needs to play the role of a “Clarifier” of issues and problems so as to be able to advise on the designing of the meeting agenda. Lastly he/she is a “Reminder”, to ensure that meetings have a results-based focus.

For the Project Manager: What the Project Manager needs to know!
Procedure of result-based meetings:
Pre-meeting: preparation:
• Review the action plan of last meeting or make sure that the action plan for the last meeting is available for review, collect new topics and develop the agenda.
• Ensure that all relevant participants are invited and have received the agenda.
• Check the room and make sure that it is prepared for the meeting.

During the meeting: facilitation:
• Present the collected topics and ask for priorities and additional issues to be discussed at the meeting.
• Review the last plan and move to the new topics, use the structure of the meeting action plan as the working guideline for the participants,
• The Facilitator/Manager has to help to clarify issues, actions to be taken, person responsible for taking action, timeframe of action and reporting back. The facilitator regularly asks key questions to clarify what actions need to be taken and whether the timeframe is realistic and doable.
• The Facilitator stays focused and gives feedback if the group drifts away while keeping an eye on the time. Effective meetings should not exceed 90 minutes – so stay focused on the issues and actions needed to address the issues on hand!
• The Facilitator wraps up the new plan and closes the meeting.

Post-meeting: follow through, reminding the agreed actions
• Take a photo record of the action plan and use it as minutes.
• Write action-oriented short minutes according the standard format of the organization.
• Use the photo or meeting action plan for the next meeting to check the progress.
• Share relevant decisions in other meetings.

What can be some traps and tricky situations?
The Facilitator relies on the decisions of the participant he/she works with and does not force the decisions. This means the facilitator needs to observe the group carefully and move with them and not dominate (lead) them. The Project Manager, who facilitates the meeting, might take over a double role, it is important to separate these roles. The facilitating Project Manager must announce, when he/she takes part in the discussion in his/her managing role.

More information: www.mindtools.com
www.efficientmeetings.com
www.businessballs.com/meetings.htm
Capacity Building
Increasing Project Management Skills and Leadership

1. The advisor has analyzed the needs for capacity building of the organization and of the managers!

These skills need to be improved!

2. The Senior Management identifies key persons: project managers, middle managers, potentials etc. set up a group for long term capacity building and learning.

I got invited to the capacity building on project management skills! This is great!

3. Kick off the event: The group designs the training content in a participatory way. They will work on their own real life cases and apply learned knowledge on their job.

Content: Management and Leadership

Welcome to our in-house training and coaching!

4. The rhythm of learning: the group meets monthly for training session. The trainer facilitator and coach designs the session focusing processes and relevance.

Communication Interaction Leadership My Personality
Management Leadership Organization System Management Instruments

The training is specific designed for our organization. We can improve the whole system!

5. The Management group creates a community of learning and sharing!

Now we learn how the project managers can benefit from their experiences!

6. This Capacity building program takes over one year to allow professional skills and personal skill to develop. The skills will be assessed and evaluated in the final session!

Problem solving Reflective Team Coaching
Step 1 Step 2 Step 3

7. The group should be enabled to organize their own follow up management circles!
Project Implementation

Capacity Building: Increasing Project Management Skills and Leadership

Improving project management in organizations means implementing new standards and change towards professional management. To achieve this, staff at all levels have to be involved, energized and enabled to deal with new challenges. Depending on the nature of the management structure, it is necessary to identify which level of staff needs to be targeted for change to maximize organizational transformation and effectiveness. Very often, the best group to target is the level of the Middle/ Project Managers of an organization. Enhancing their ownership, knowledge and understanding in management and leadership issues, can better achieve the improvement of organizational performance.

This kind of “On-the-job Training/Coaching” can ensure the appropriate transfer of improved skills and practices into the workplace and provide clients with a step-by-step system of change and feedback. Additionally, this system of intensive training/coaching helps create a strong community among the Middle Managers for developing personalities, leadership and management competencies. All issues of the project managers coming up during the project implementation can be discussed in this kind of training.

For the Advisor: What is the role of the Advisor?
It is recommended that the advisor and the senior management jointly identify a relevant group of Middle/ Project Managers who are trained and coached over a period of at least one year. Promote the idea of long-term Capacity Building as part of organizational project development. The Trainer, Advisor and Senior Managers should work very closely to ensure agreement on content, timeframe, and follow-up/support needed for the training.

The advisor sets up a one-year training/coaching together with the Senior Manager and the Trainer which is linked to the strategy for organizational development.

- Analyze the training needs of the project/organization staff.
- Identify the middle managers/project managers (preferable not more than 10 people)
- Agree with the Director and Senior Management on the participants list.
- Conduct an orientation session (with participants of the senior management) to set the context of the training.
- Analyze participant’s management needs and decide training subjects.
- Keep up the rhythm of learning: best to have monthly sessions. Depending on needs the training content could include: Project Cycle: planning and organizing, implementation, monitoring, evaluation, analysis and reporting, communication skills, leadership, staff management, organizational systems, vision and standards, finance management.
- Link input of training to organizational development/ change management.
- Give learning tasks after each session which are applied at their job and are follow up in the Sessions.
- Evaluate training regularly and feedback improvement.
- Celebrate the training with a ceremony and hand over certificates.

For the Project Manager: The Project Manager should take part in this capacity building training!

What can be some traps and tricky situations?
The full engagement of the Director and Senior Management is key to the success of this kind of training/coaching, without which its effectiveness and impact will be undermined. The trainer/coach should provide monthly feedback to the Senior Management, to link and integrate training to priority organizational issues. The Senior Managers should serve as additional resource persons during the training and should be invited to present specific organizational standards, for example staff policy, code of conduct, planning and reporting standards, finance system etc. during training sessions. Sessions should be regularly visited by the Director to remind and link the vision of the project/organization to the training and provide encouragement and moral support to the Middle/Project Managers. The trainer should be experienced in project management as well to provide appropriate coaching to the clients.

More information about Project Management: www.mindtools.com, www.idea.gov.uk,
http://dbresultsmatter.org/irpdm
Staff Management with Feedback Interview

1. Managing staff means to communicate regularly with them.

The staff of my project is not working well. I have to speak with my project assistant. He has a lot of skills. How to improve and encourage him?

3. Prepare the interview with the staff: records, last interview notes, performance evaluation, job descriptions, reports etc... (to provide examples and evidence)

These are my staff notes. Oh, the last interview was 6 months ago.

5. Address the critical parts in a appreciative constructive feedback way.

You have excellent skills in... for example...

But there was this specific case and you have to improve this because...

My suggestion is to do it better this way....

To learn and improve this skill, an task can be....

2. Learn how to give feedback. Keep always the golden rules of communication in your mind!

As a project manager I have to learn how to give feedback!

4. Open the interview in a friendly and open manner.

...How are you...
...This is a feedback....
...review the project work...
...1 hour time....
...improvement.....
...agreement....

...ok...

understand...

6. Agree on some actions, to improve the skills of the staff and supervise closely.

Great, let’s meet again in 2 weeks!

The task is clear to me. Thank you for this constructive feedback.

7. Close the interview nicely and agree on the next appointment.....
Project Implementation

Staff Management and Constructive Feedback

Why is Staff Management and Constructive Feedback necessary?
Projects are made by people and project activities are conducted by staff. So this means during the implementation phase, project advisors or project managers will have to deal with a lot with staff issues. Do staff perform according to expectations? What kind of conflicts come up in the team? What kind of respect and discipline do staff have for the rules and regulations? Do they monitor and report efficiently? The manager/leader of the project has the responsibility to develop the staff, to build up their capacity and increase their ownership and self-organization.

For the Advisor: What is the role of the Advisor?
Analyze the feedback culture or the organization and project team. Organize or hold a workshop about communication and feedback. Commit the managers to use the feedback with their staff. Integrate this feedback style into your own advising style and be a role model for giving appreciative and constructive feedback.

For the Project Manager: What the Project Manager needs to know!
An elementary tool for project managers is learning how to give feedback to staff, to counterparts, to network and to other managers. We call this tool the “sandwich feedback” which starts with an appreciative view of the staff, leading to a constructive and objective critique of specific performance issues; and ends with a positive constructive solution and encouragement. This may seem easy, but it is not and need a lot of practice. However, this kind of feedback if done well and regularly can have a big positive impact on helping improve their performance, and strengthen work relationship and teamwork. Please follow the procedure of the cartoon, when you plan a staff interview.

• Learn and experience the constructive feedback principles.
• Internalize the golden rules of feedback communication.
• Prepare the interview, look at notes and specific issues you want to address.
• Open the interview: ice breaking, warming up and give orientation.
• The interview body: address issues in a constructive style.
• Finish the interview: with concrete agreements and a next appointment.

To ensure a good interview/feedback session, the managers and staff need to practice and understand how to conduct constructive feedback through proper training and role play to get feedback on appropriate styles, body language, and clarity of language used, and so on. Project Managers, especially, should reflect on their own personality and communication style. They can first do some exercises and self-tests to understand their own personality categories, such as: introvert, extrovert, people orientated, task orientated. Managers should also reflect their own roles in a team to understand their role categories.

What can be traps and tricky situations? What should be considered?
A staff interview for purpose of providing feedback is often considered as unpleasant. Both managers and staff often approach such interviews with fear, unease and sometimes resistance. For many, such interviews are unfamiliar or new. For this reason, the manager has to be very clear about his/her role and has to prepare for the interview systematically and seriously. Most staff are afraid to get bad feedback and most people dislike confrontation and direct criticisms. For this reason, it is important for the manager to be open and transparent about the purpose and procedure of the interview/feedback session.

More information:  www.wikihow.com
                        www.coachinginsight.co.uk
                        www.selfgrowth.com
                        www.rightattitudes.com
1. Projectcycle - get the wheel going

As a Project Manager I have to ensure that M&E takes place. All these cycles make me dizzy!

2. Work plan - update progress in weekly meetings

3. Data collection at the project fieldsites update monthly output\ outcome results

4. Quarterly progress reports ensure documentation about project process

5. Quarterly or midterm management reviews - solve problems, make decisions

I wonder what has changed or improved after our last activities?

6. Annual review - celebrate success, share lessons learnt and plan way forward

The way of improvement

The way of improvement
Project Monitoring and Evaluation System

What is a Project Monitoring and Evaluation System?
Setting up a project and having a lot of ideas, planning the activities is mostly the easy part. But to check and record if all this activities are done and effective, takes more effort and discipline. The progress of the project has to be reflected and assessed through feedback loops all the time. There is the routine level, which you have to monitor. There is the output level, figures, data, facts, which to collect and document. There is the outcome level, which has to be investigated and researched after a certain time of implementation. To keep this in mind and track on it, the project needs a system that ensures transparency of the project progress. The information of this system will lead to problems, successes and lessons learnt, which is necessary to reflect to move forward.

For the Advisor: What is the role of the Advisor?
Analyze the situation of the project, how big is the understanding of monitoring and evaluation. Make a survey about the used instruments and present your results. Review existing instruments and adjust them to the needs. Develop new instruments together with staff to monitor the outcome level appropriately (result-based monitoring). Test the new instruments, improve them until they can be officially released as standard instrument. Provide assistance, when staff is using the instrument the first time. Build up the capacity for monitoring and evaluation through regular feedback and reflection session (monitor the monitoring).

For the Project Manager: What the Project Manager needs to know!
There are some essential elements that should be developed and implemented:

• Does everybody understand the project cycle and the importance of monitoring to turn the wheel to move forward?
• Follow up the work plan in weekly meetings with the unit.
• Create a log frame, output table and update data monthly.
• Develop a specific form of instrument to monitor the outcomes at the target group.
• Develop a standard format for a quarterly report.
• Invite for quarterly review to monitor status and solve problems.
• Invite for midterm review to share and present achievements.
• Hold an annual review to analyze, collect success stories, plan for the next year.

What can be traps and tricky situations?
Implementing a new system and follow new structures is usually a big change and need some time, until it becomes routine. The managers and staff have to understand the importance of this project cycle stage. To overcome resistance: remind the vision and the overall goal of the project, show the benefits that they will have through this system, provide new techniques and information about monitoring and evaluation, assist and help in building up capacity, provide close coaching and create community.

Without monitoring and evaluation, there is no reflection and no extended reporting possible. The data and information out of the M&E System will feed the analysis and project report in the next step. With monitoring and evaluation there might come up a lot of issues and problems as well, that were hidden and not assessed. Be prepared to deal with this. Otherwise the M&E results will show specific success and lead to useful lessons learnt and best practice model. So M&E becomes a learning tool as well, through communication, sharing and reflecting all project staff can learn from each other.

More information:
- www.ifad.org/evaluation/oe/process/guide/index.htm
- http://adbresultsmatter.org/rfpdm
1. In the office: Review the context of the project: proposal, mission, work plan, outputs, outcomes to prepare for the field visit.

I would like to visit the field next Monday ... Can you make appointments with ....

As a Project Manager I have to meet people in the field to keep contact and check the progress myself.

2. In the office: What are you going to do in the field? What needs to be observed? Who do you want to talk to? Which activities should you join? Is there a problem that needs a closer look?

This I do not understand? ... These are my questions for the target group!

3. In the field: Warm welcome with the field staff, partners and counterparts. Participatory observation, walk through the area, create a relaxed atmosphere!

Take your time!

4. In the field: Join some activities and talk to the local people. Get some information about positive change and their current situation.

5. In the field: Feedback with your field staff, collect data with a log frame table, logbook, checklist or questionnaire.

Let's review the process together!


Now I understand the situation better ...

This was good........This needs to be improved........What do you think?

7. When will be the next field visit?
Project Monitoring and Evaluation

Project Monitoring Field Visits with Focus on Outcomes

Why are Monitoring Visits important?
The project plan is not a guarantee that supported activities are progressing as expected. Maybe the projects collected relevant data about output indicators, but project outcomes and impact on target population are more difficult to document. This means the project manager should always have the impact of the project on the target group in mind and visit the field to see the results and meet with the target population. Also, if projects are geographically dispersed and managed by field staff in different locations, field visits also provide opportunities for project managers to maintain regular communication with field staff. Hence visiting the field at least quarterly and to meet the target group and collect additional information to feed into the quarterly or midterm meetings/reports is essential. This kind of specific field-based information is to ensure that all stakeholders are involved in providing information for future decisions about activities to increase commitment and ownership.

For the Advisor: What is the role of the Advisor:
The advisor can work on different levels. First he/she can support building up a good monitoring and evaluation system with useful tools. Second he/she can go to the field and share his/her observations with the project team like an external evaluator. Third the advisor can be an on-the-job trainer and help prepare the visit together with the project manager. Fourth the advisor can write a field report himself and contributes to the documentation of the project.

For the Project Managers: What the Project Manager needs to know!
Ensure a constructive monitoring visit:

Preparation:
- Review the work plan of the project: What are the achievements and progress of the project at the output and the outcome level.
- Read the last monitoring report and focus on planned action.
- Organize the visit and remind staff to make appointments with the target group.
- Design relevant tools, to investigate specific aspects (questionnaire, checklists...).
- Plan to join an activity at the field to observe the work.
- Identify what gaps exist between the plan and reality that needs further investigation.

Operation:
- Carry all documents with you.
- Visit specific sites, walk around and observe.
- Interview key stakeholders and take part in the field activities.
- Organize meetings with villagers.
- Keep the triangulation principle in mind: data, observation, interviews: these three perspectives give you the whole picture.
- Take photos and make notes.

Reporting and Documentation:
- Analyze the collected data and information of the field.
- Write a field report which assesses the project and give recommendations.
- Communicate results, recommendations to management and responsible persons.

What can be traps and tricky situations?
People, with people and for people, make development projects. People are the focus of change; this needs communication skills and sensitivity when making contact in the field. Monitoring can become a very bureaucratic task and some people often feel uncomfortable, if somebody comes to check and asks a lot of questions. Monitoring may become an exercise of ticking off tasks only, thereby making it too technical and quantitative orientated. You should use your intuition, your common sense, your heart as well as your head when assessing work in the field. Avoid making field visits too static, rigid and critical. It is better for a project manager to help build up a working relationship of trust and commitment and empower field staff to do the monitoring himself or herself.

More information:  www.oecd.org/ (Project Monitoring and Result-based Monitoring)
www2.gtz.de/monitoring/
www.uk.locallivelhoods.com/Moduls
Quarterly\Midterm\Annual Review for Monitoring, Evaluation and Organizational Learning!

1. Plan and design the review with Senior Managers carefully!

2. The facts part: each project, unit etc. presents briefly the status of the project work plan achievements, related to the quarterly\midterm\annual report!

3. The management part: share problems, lessons learnt and make final decisions!

4. The presentation part: make success and achievement visible, each project exhibits products, photos, documents at a shared market place.

5. The organizational issue part: Create space to discuss concerns! What does the organization need to move forward?

6. The fun part: build community and unity! Make it an inspiring event!
Project Monitoring and Evaluation

Why is a Quarterly Midterm Annual Review for Monitoring, Evaluation and Organizational Learning important?

Regular Organizational/Project Reviews (half day up to two days) are an important process management tool to take stock of organizational/project progress status, measure progress, share information, and agree on actions for the next period. Most organizations conduct reviews on a quarterly basis and with the last quarter review serving as the annual review and planning meeting. The participants should include Senior and Middle Managers, Project managers and relevant staff. The review reports and presentations of the project should focus on achievements and outputs and should also serve as a platform to discuss problems and make decisions together drawing upon the participants’ experience and understanding of the field situation in a consultative manner (building a “Learning Organization”).

It is also a forum to celebrate success and encourage further endeavor. The way the review presentations sessions are organized can be creative and fun, using formats such as “exhibition”, or “market place” of the project progress with photos, charts, and graphs, project products, videos, etc. Problems, solutions and successes can also be presented through drama, role play or story telling.

For the Advisor: What is the role of the advisor?
The Advisor during the review is also an evaluator and observer. Prior to the review, the advisor should help to prepare the agenda with the senior managers to identify key issues for each session. As a consultant for processes he/she can help design and conduct specific sessions and provide needed interventions, for example help prepare a questionnaire, draft some exercises for the sessions, etc.

For the Project Manager: What the Project Manager needs to know!
Procedure of a Quarterly Review:

Before the review:
• Prepare the agenda carefully and propose list of participants for the review.
• Communicate the deadline for the draft quarterly report.
• Ensure that draft reports are submitted and read before the review.
• Propose presentation formats (power point, mind maps, role plays etc…).

During the review:
• Each project team/unit/ department presents the status, problems and solutions of the project using their work plan as reference.
• Plenary session on questions, discussion and actions/decisions per project .
• Decisions are documented in result based minutes in a standard format.
• Special issues presented by Senior Managers.
• Feedback by advisor (optional)
• Socializing: lunch or dinner together and share of self made food...
• Make it special: visit the “exhibition”, “market place”, have a field trip together, prepare a game-exercise for reflection and teambuilding, show a video…
These activities make the review more enjoyable and meaningful for participants.

After the review:
• Minutes and agreed decisions should be monitored in Senior Management Meetings.
• Review decisions should be reflected in the next review meeting and status of implementation reported.

What can be Traps and Tricky Situations:
The Review session is not supposed to be a dry official meeting full of verbal reports. The time spent on reporting is as important as time for constructive discussion and decision-making. A good mixture of visual and verbal methods creates an inspiring atmosphere. The use of World Café method, exhibitions, theater or role-plays can help participants relax and open up for sharing and discussion.

More information: www.theworldcafe.com
www.openspaceworld.org
1. Analyze and investigate the report writing culture.
   - As Project Managers we have to write quarterly reports.
   - There is no information to write about!
   - Why do we need to write a report?
   - We do not know how to write!

2. Design and decide a report standard structure which meets the reporting requirements of donors.
   - REPORT STANDARD
     1. Purpose of project
     2. Progress of project
     3. Project Management
     4. Monitoring Data
     5. Evaluation Outcome
     6. Analysis SWOT
     7. Conclusion
     8. Recommendation
     9. Next Planning
     Appendix: Photos

3. Introduce the new standard. Train on project cycle management and understanding. Review the monitoring and evaluation system.
   - Reports & Analysis
   - Plan
   - Report
   - Activity
   - Monitor
   - M & E feeds the analysis, the report influence the next planning!

4. Overcome fears for writing: start with a mind map to get as many ideas as possible. Convert keywords into sentences.
   - Brainstorm, mind map, wild, chaotic, this is easy... oh, so many things...
   - How to start...
   - Now I write it down...

5. Celebrate the first report! But give specific feedback to improve step by step quality!

6. The quality of the reports will increase with increased knowledge about the project cycle, effectiveness of the monitoring and evaluation system, and writing experience.

7. Keep going! Learning by doing is the only way!
Project Analysis and Reflection

Quarterly Reports ensure Documentation!

Why are quarterly progress reports necessary?
Most of the projects in the development sector are funded by International Agencies. The field staff has to report to the project manager; the project manager has to report to the senior managers, the senior managers have to review and summarize all the project reports into a program report to submit to the donor. This cascade of information and documentation must be systematically built up to ensure a credible reporting and being in line with the project proposal and agreed outputs and outcomes with the funders.

For the Advisor: What is the role of the advisor?
The main role of the advisor is first to analyze and investigate the report writing culture. Then develop with Senior Managers a simple standard report-writing format, which includes all necessary data needed for the donor (annual report). Assist in the process of writing the reports; help the writers to focus on improving the quality of the reports through reflection.

Sometimes Project Managers need deeper explanation of the project log frame and the purpose of the project, especially if the proposal has not been designed with their participation and has been written in a language which they may not understand.
Report writing is especially challenging in cultures where analytical and narrative writing have not been stressed and learned extensively. Hence, project managers and staff need to learn how to write simply, clearly and analytically, step by step before they can produce good reports.

For the Project Manager: What the Project Manager needs to know:
The structure of a report:
Example for headings for a standard format:
- Purpose of project; background- vision and mission
- Progress, activities of the last quarter according to the work plan versus actual the status of activities completed
- Internal and external resources
- Monitoring and Evaluation and Quality control- progress of change
- Outcome and Impact- visible changes and benefits
- Analysis (SWOT)- of detailed aspects of the project
- Conclusion
- Recommendation
- Appendix: Work Plan for the next quarter, photos, success stories

The process of writing:
The first step is to break the "fear" to write. To do this, use the mind map method to generate more ideas to write about. Draft the structure of the report with guiding questions. Practice to write small paragraphs addressing each question. Finally link all the paragraphs together in a logical manner to produce an acceptable quarterly report. The report has to reflect on the project cycle management and on the expected results of the project.

What can be traps and tricky situations?
This process needs time and patience and encouragement. Reports depend on data and information gathered in the monitoring and evaluation system and process. If report writing is new to staff and managers, they should factor in time in their work plan for thinking, writing and reviewing! The quarterly report is an important document for the (quarterly) review sessions.

More information:
www.heacademy.ac.uk (blended learning, report writing)
www.creativewriting.com
www.youtube.com/watch?v=AFGNKJnuxdg (video lecture about writing reports)
1. Define and clarify the problem, issue or case, you want to analyze. Be specific in the problem statement!

Is this the real problem? This is too general!

2. The Problem tree starts in the middle with the problem, works down the causes into the roots and looks at the effects on the top.

Effects
Because of this cause the problem occurs!
This problem effects other issues!

3. Through asking why these problems occur you will find a lot of different causes. Now work on each cause and ask again why this cause occurs. Develop the tree structure!

Why is this so? Why do we have this problem? What causes this cause?

Problem
cause cause
cause cause cause cause
cause cause

4. Have you finished the causes look at the problem again. Does this problem create some serious effects on higher level?

Now I see the connections!

5. Look at the finished problem tree. Now develop the objective tree! How? Convert the problem into an objective! Convert the causes into positive statements!

From negative to positive!

6. Problem tree and objective tree are finished. What are specific actions to achieve the objectives. Where to start first? Identify first ideas and create small work groups, to develop the action plan.

This has priority!
We start with this, this is easy to change!

When to follow up......??
Project Analysis and Reflection

Why is analyzing project development and progress necessary?

Analyzing is the first step to get more insight about the problem. But the next step is to identify appropriate specific actions to resolve the problems and constraints encountered. Analyzing with no action leads nowhere! The Problem tree analysis can be a powerful analyzing tool which is usually used in project log frame planning as well.

With this I would like to introduce the problem tree analysis as an alternative tool for project analysis. The problem tree will lead to agreeing on the objective tree, which in turn will lead to development of specific action planning.

For the Advisor: What is the role of the Advisor?

To be able to advise on the project analysis focusing on problem solving is complex and sensitive work. Problems in smaller project usually can be solved more easily. Problems of complex projects need deeper understanding and analysis. The view and feedback of an outside advisor is always helpful. The advisor can recommend the problem tree, especially when a lot of action have not been taken or have not shown good results. The advisor can introduce the problem tree instrument through a workshop or facilitate a problem tree session. The key output should be an agreed action plan to deal with the problems and also an agreement to monitor if the problems are solved.

For the Project Manager: What the Project Manager needs to know!

The problem tree starts with a problem in the middle. First you have to be clear, what is the real problem? Then you look at the causes, which create this problem. And what are the causes of the causes and why do they occur? The causes are negative specific statements (please avoid general statements like: no money, no capacity etc.). When you fill up the cascade of causes, look also at the effect that are caused by the project. The tree will make you realize how complex problems are. In building up a problem tree, the atmosphere may be heavy because you are digging deep into the real problems and negative situations. To overcome and lighten the atmosphere, you should also start converting the problems into objectives. Ask questions like "What would be the positive and desirable status when you overcome the problem?" Ask the participants to think about positive statements that will feed into the objective statements. Ask questions like "What will be the situation if the objectives of the project are achieved? What kind of constructive impact will it bring at each level?". When building objective statements try to focus on developing positive statements, which have the highest priority, or can achieve quick results (quick wins!). Also try to identify which causes are beyond your influence and have to be accepted or addressed on different level. After the objective tree and positive statements are defined, you can focus on the actions! "What kind of actions is needed to produce this positive statement."

The process of developing a problem tree!

- Identify the problem. Start with a small, specific and clear problem, if it is too big and general you will get lost and it would take too much time. Make sure that in the discussion, everybody is clear with the problem and understand the whole situation. This is an important clarifying step.
- Look at the causes, why does this problem occur and develop the why because problem analysis cascade.
- Look at the effect that this problem makes in a bigger picture.

The process of developing an objective tree!

- Identify now the positive statement and objective of overcoming the problem.
- Look at the problem tree and convert the causes/problem cascade into positive statements.
- Identify positive statements on how reaching the objective will have a positive impact on the situation.
- Look at the tree structure - look at the branches, identify which you want to focus on; set priorities; decide which is easy to realize and what is beyond your influence.
- In small work groups, the project team can work out specific actions and present this in the next meeting!

What can be traps or tricky situations?

It is easy to get stuck with some problems. The advisor needs to understand why. It may be a taboo, a matter of power or relationship. Do not continue with such a problem, move to another one or an alternative problem. A rational approach allows the participants to see the situation clearly; an objective tree provides a variety of alternative solutions. The problem tree is heavy, so do not dig too deep, ensure to finish with the light objective tree.

More information: www.cdi.org.uk/rapid/tools/toolkits/communication/Problem_tree.html
Problem solving with a reflective team session

1. One person presents his/her case (problem) and addresses his/her concern and discusses the case. (5 Minutes) One team member takes over the role of the facilitator.

2. The team asks more questions to understand the full situation (no interpretations or solutions). You can use mind maps, pictures, structure diagrams, etc. to visualize the problem. (15 Minutes)

3. Team members talk now about the case, think about causes, give opinions and develop opportunities. The case person listens only. (15 Minutes)

4. Now the case person responds to all the ideas, suggestions, and assumptions of the team. He/She selects ideas and solutions which seem to be most appropriate. (5 Minutes)

5. The case presenter is now thinking about specific steps and actions he/she wants to take to solve the problem. (5 Minutes)

6. Finally, the whole team reflects on this session and gives feedback to each other. (10 Minutes)

The issues discussed in the reflective team are confidential!
Project Analysis and Reflection

Why does a reflective team helps to solve problems?

Everybody needs reflections and exchange to clear thoughts and learn from different perspectives. A manager especially needs to share issues with other managers at his/her level and develop a culture of reflection with his/her peers. Through a reflective team session, managers are empowered to improve their communication and facilitation skills and to solve their problems on their own.

For the Advisor: What is the role of the Advisor?
The advisor can organize or conduct a workshop to introduce this tool. Managers have to learn and practice until they feel confident to follow the structure of a reflective team session. The first meetings for a reflective team session should be accompanied by the advisor as a coach and trainer on the job. The group might need some more assistance in the facilitator role. The advisor has to ensure that the group meets regularly to build up the group dynamic. Finally the group of managers should be strong enough to organize themselves without the advisor’s help.

For the Project Manager: What the Project Manager needs to know!
A group of managers - Management Circle- meets regularly with one person presenting a case or problem to the group. Through listening and understanding the group members get deep insight in the problem. Visual aids to depict the problem should be used, such as drawing a chart, picture, map, structures etc. In the next step, the case presenter listens to the discussion of the group, what they think and what they suggest, how they analyze the case and what kinds of solutions are proposed. After this reflection the case presenter responds to the different opinions and considers options. Finally he/she commits some specific action for himself/herself to take to solve the problem. The session closes with a process review. Of course all issues should be confidential, this ensures that group members feel comfortable to open up and be honest. The group benefits and learns from each case. They find that they might have similar problems and can transfer actions into their own work.

Procedure of a Reflective Team Session

Each group member can bring up one case; the group decides and selects one case.

(5 Minutes)
- The case presenter presents the case and address his/her concern. One team member takes over the facilitation of the session. (5 Minutes)
- The group asks more questions to understand the full situation using the visualizing technique. (10 Minutes)
- The group discusses the case and the case presenter listens only. The group reviews what they would do, if they would be in his/her situation: “I think that.... I would do this......”. Do not give advise, what the case presenter should do! The facilitator writes ideas and solutions on the flip chart. (15 Minutes)
- Now the case presenter reflects and responds to the ideas, suggestions of the group and makes notes. (5 Minutes)
- The case presenter decides what actions are needed to resolve the problem. (5 Minutes)
- The work on the case is over and the group reflects on their work and gives feedback. Use your communication and feedback skills! (10 Minutes)

What can be traps or tricky situations?
First the Senior Manager must give official permission to set up a Management Circle. The group members should be selected carefully: all participants should be from the same management level. Developing a constructive group dynamic might take some time. If the team sees the benefit to share and help each other a strong management team can be built up. Joining this supportive management circle is a great opportunity to develop leadership and management competence.

More information:
- www.taosinstitute.net (team coaching)
- www.mindtools.com
- www.leader-values.com
- www.solutionsology.co.uk/trainingpages/SFRT.htm
- www.businessballs.com/freecolresources.htm
1. In the office: Think about stakeholders of your project who examples for success in the project! Identify persons, who to interview!

3. In the field: In addition take interviews of other people, who know the interviewed person to get another perspective and dimension of the success!

5. In the office: Lay out the story! Use the photo, design your standard! Add always a quotation of the person in the story!

2. In the field: Interview the person, record the interview or take notes! Write down some impressing quotes of the persons. Take a photo of this person!

4. In the office: Write down the story: give an introduction, general information about the project, describe the why and how this person was involved. What has changed and why?

6. For the organization: make it public, present it to others! Send a newsletter to the network! Collect other success stories and make a booklet!

7. What can you learn about these successes? What are the success factors? Which lessons can be transferred to other projects?
Project Analysis and Reflection

Success Stories and Best Practice

How does the project benefit from successes and best practices?

Projects mostly deal with problems, which need to be solved. Another approach is to focus on successes and best practices. By identifying successes and best practices, the project staff will be surprised and energized by their positive achievements. By investigating successes, the knowledge of essential key positive development factors is shared and built up. Appreciative Inquiry uses this positive perspective approach and can be applied in interview techniques and for organizational development.

For the Advisor: What is the role of the Advisor?

Present and promote the use of successes and the appreciative inquiry approach by doing this yourself when you advise your counterpart. Introduce the positive perspective at meetings and training. You can identify and develop some success stories based on your field visits to projects and present these as examples to the project members. You can also organize a workshop and together with participants identify or discuss best practice models. Assist and advise in survey and analysis to search for successes and human interest stories.

For the Project Manager: What the Project Manager needs to know!

The focus on the positive development instead of on problems helps change our perspectives. Through investigating successes, the managers and staff can build up their self-esteem and help document evidence of change and improvement. The documentation of “Best Practices” will help the project organization to identify core factors to improve on future strategies. Also as part of analyzing and documenting “successes and best practices”, it is also important to write up “Human-interest stories” to increase add interest and give reality to the lives of people the project is supposed to be influencing. Adding a photo of the person whose story is being told makes reading more interesting and real. Try to understand and identify what was or is running well and why. Use these to analyze the success factors and build on these practices in the future.

The steps to write a Human Interest Story!

- Identify areas of success, describe and investigate this success
- Develop a list of best practices and set priorities
- Select one best practice and interview the target group (prepare questions)
- Make photos of evidence and of the interviewed people, record personal data
- Select precise quotations from the interview and use them in presentations.
- Write the story, what was the background and what has changed
- For each interviewed person write a human-interest story
- Summarize the interviews and analyze key factors
- Key factors should be considered when reviewing other projects

Investigating and analyzing best practice models takes time and energy. Collecting data, interviewing people in the field must be well planned. The findings and conclusions have to be shared with the management level and are part of organizational learning. Think through how you can use the identified key factors of success and transfer such lessons to other projects. Best practice models and lesson learnt are interesting for other projects and organization as well. Make it public, share and build up your internal knowledge management system!

What can be traps and tricky situations?

Success is not static. This means a project or organization should not get stuck in one best practice or in interviewing always the same target group or person. Human Interest stories must become alive, if they present variety and diversity. If you can make a booklet or newsletter with the latest stories, stakeholders will really like to read them and may even be interested to meet the person! Ensure that stories are honest, realistic and professionally written.

More information:
www.themuseumexperience.com/PDF/Powerful_Tool_for_the_21st_Century_Communicator.pdf
www.ripsr.sc.edu/iejournal/iejournal0611/Appreciative%20Inquiry.pdf
www.fundraising123.org/article/how-write-human-interest-story
www.fpta.org/publicpolicy_advocacy/writinghumaninterest.PDF
www.iisd.org/aii (Appreciate Inquiry)
Glossary

Organizational Development:
www.barefootguide.org

Facilitation Skills:
www.worldcafe.com
http://tiliz.tearfund.org (facilitation skills handbook)

Management and Leadership Skills:
www.mindtools.com
www.networklearning.org

Others:
www.civicus.org
www.thetrainingworld.com
www.educationworld.com

Comics and Cartoons for Development:
www.worldcomics.fi
www.worldcomicsindia.com

Follow up:
www.the-capacity.org

These are my favorite internet pages, which inspired me and provided a lot of material for my work!

Do you have questions, feedback or do you want to share some experience please send me an email: mailkewischmann@goldmail.de

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We are Mrs. MaiProject and Mrs. MaiCoach and we will explain and show you how to improve your project management.

This visual guide is full of information. You can learn about the project cycle. You can learn essential management skills and how to run a project effectively. You can learn how to improve the whole organization towards being a Learning Organization.

Good Luck!