

Moving forward

Master in Rural development and Sustainable Management Project Planning

Rural/Local Development Project Management: competence baseline

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3st LESSON: Technical competences for rural/local development PM



TECHNICAL COMPETENCES

Competences for Project Management

Technical Competences

- The scope of technical competence includes the main competence elements for project and program management.
 - Existing knowledge, methodologies, activities, intellectual tools aimed at handling problems and finding solutions.



1.01 Project management success

- **What does project success mean?**
 - Ending of a project
 - On scheduled time
 - According to budget
 - Within the performance or specification levels
 - With the agreement of client

1.01 Project management success

- **Were they a failure?**
 - **DENVER INTERNATIONAL AIRPORT**
 - Expected cost: 1 billion \$
 - Real cost: 5 billion \$
 - **SYDNEY AUSTRALIA OPERA HOUSE**
 - Expected cost: 7 million \$
 - Real cost: 100 million \$

1.01 Project management success



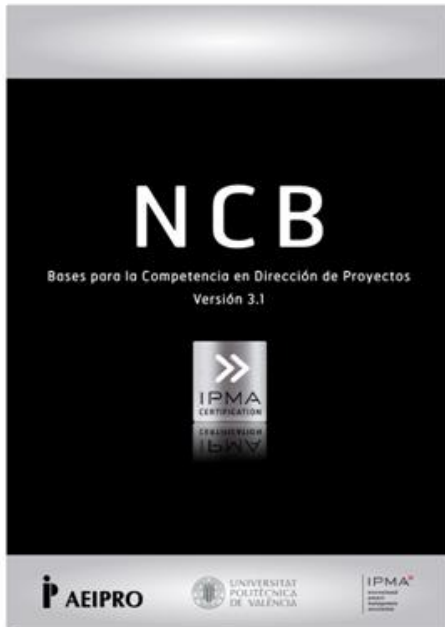
• Success in a Project-Program

– Is defined as

» “the appreciation by the various interested parties of the project outcomes”.

» This definition is more challenging than “to produce the project deliverables within time and budget”, this is only part of it.

» **Social integration is vital for a project success (IPMA, 2006)**



1.01 Project management success



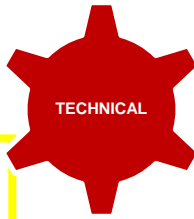
1.02 Interested parties



- Interested/involved parties
 - “Interested parties” is the ISO approved term, adopted in ICB;
 - » “**participants**” is a synonym used for interested parties;
 - » “**client**” is also used in the text to identify a subset of interested parties)
 - People or groups who are interested in the performance or success of a project, or who are constrained by the project.



1.02 Interested parties



HUMAN DIMENSION

- **THE PROJECT AFFECTS PEOPLE; IT MODIFYES THEIR LIVES. IT MAY ALTER THEIR WORK, AND SOMETIMES, THEIR HABITS AND CUSTOMS.**
- **THE REAL MEANING OF IT IS IN THE HUMANITY OF THE PROJECT (TRUEBA, 2000)**

"Interested parties"
Technical competence 1.02

1.02 Interested parties



HUMAN DIMENSION

PROJECTS

***EMPOWER PEOPLE RATHER
THAN MARGINALIZING THEM***

1.02 Interested parties



HUMAN DIMENSION

■ **IT IS ESSENTIAL THAT ALL SOCIAL INFORMATION SHOULD BE SPECIFIED IN THE DESIGN OF PROJECTS AND THAT THE FINAL OUTCOMES ARE ADAPTED TO THE DEMAND OF THOSE WHO WILL HAVE TO COEXIST WITH THE RESULTS OF IT** (Cazorla, 2001).



1.02 Interested parties



HUMAN DIMENSION

- **CONSIDERING THIS SOCIAL DIMENSION, THE PROJECT**
 - **CAN BE CONSIDERED AS A SOCIO-ECONOMICAL ORGANIZATION THAT DEVELOPS A SERIES OF ACTIVITIES WITH THE SAME AIM, AND THAT IS AUTONOMOUS (TRUEBA, DE COS, 1990).**

*"Teamwork".
"Requirements and
objectives"*

Technical competences

"Permanent organizations"

Contextual competences 2.05



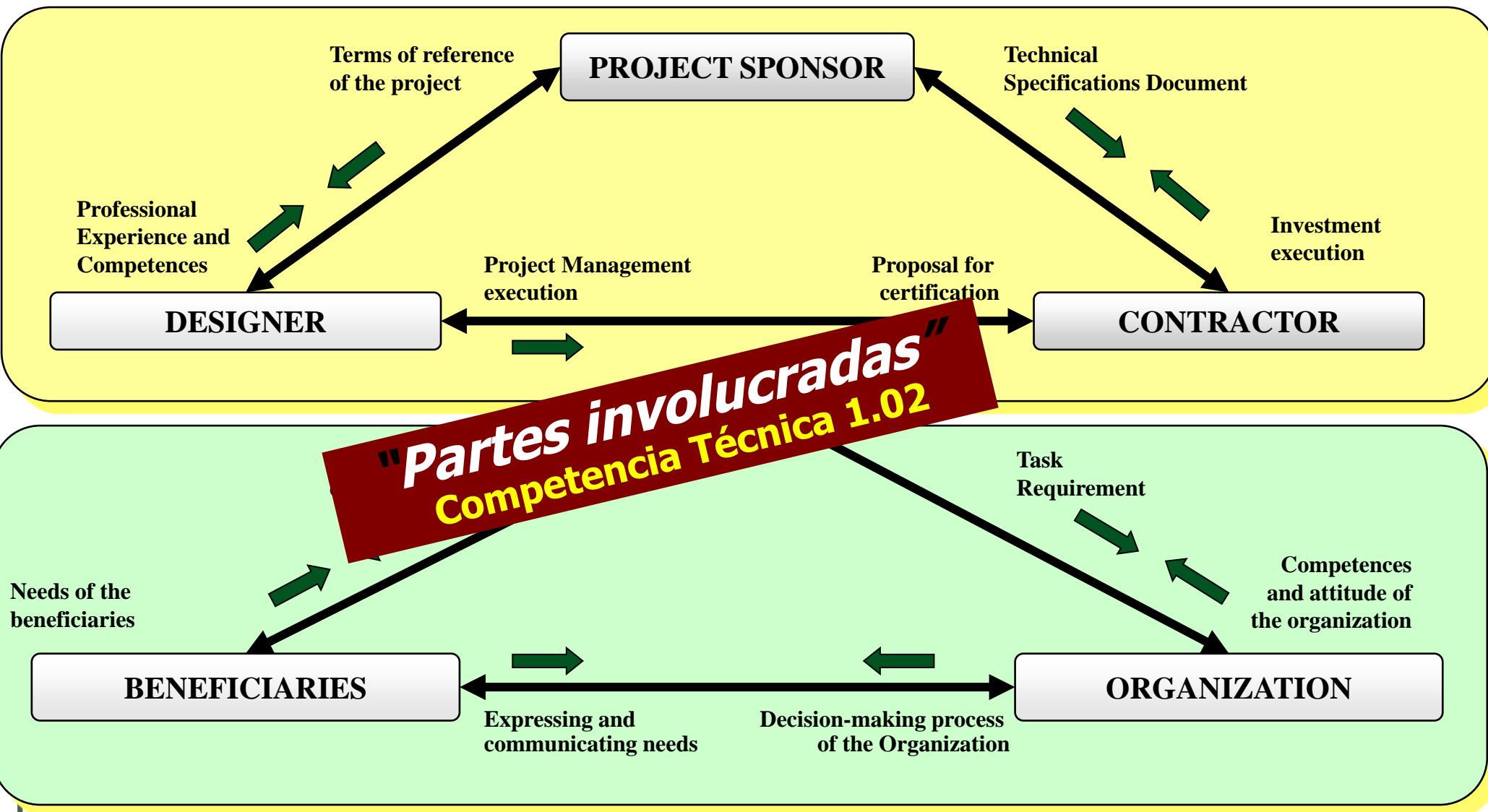
■ PROJECT MANAGEMENT:

- **A PROJECT IS AN OPERATION WHERE HUMAN, FINANCIAL AND MATERIAL RESOURCES ARE ORGANISED IN SUCH AN ORIGINAL WAY TO PERFORM AN UNIQUE SET OF WORKS ... TO ACHIEVE BENEFICIAL CHANGES ... (IPMA, 2001).**

1.02 Interested parties (Stakeholders)



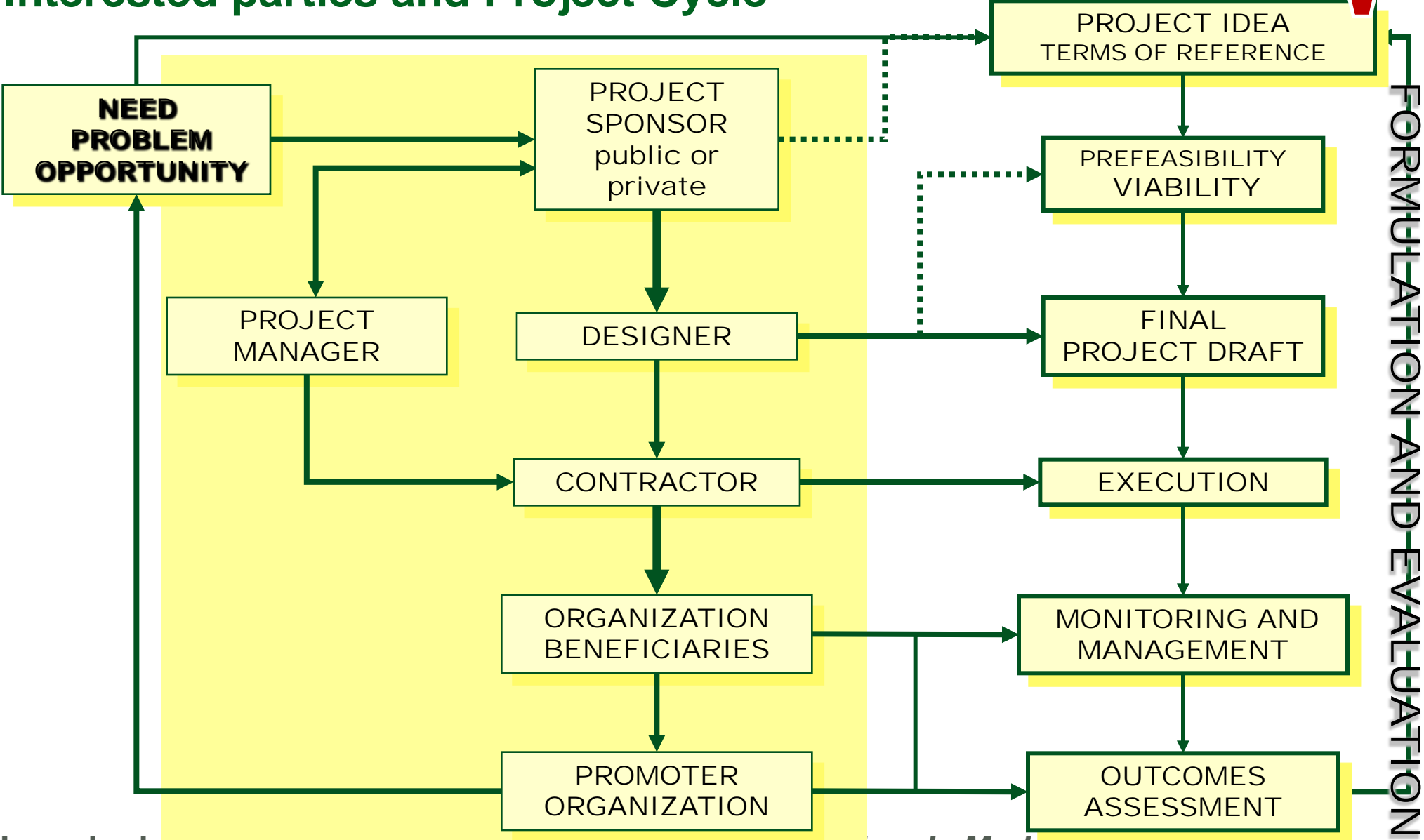
Relationship between Stakeholders in the project



1.02 Interested parties

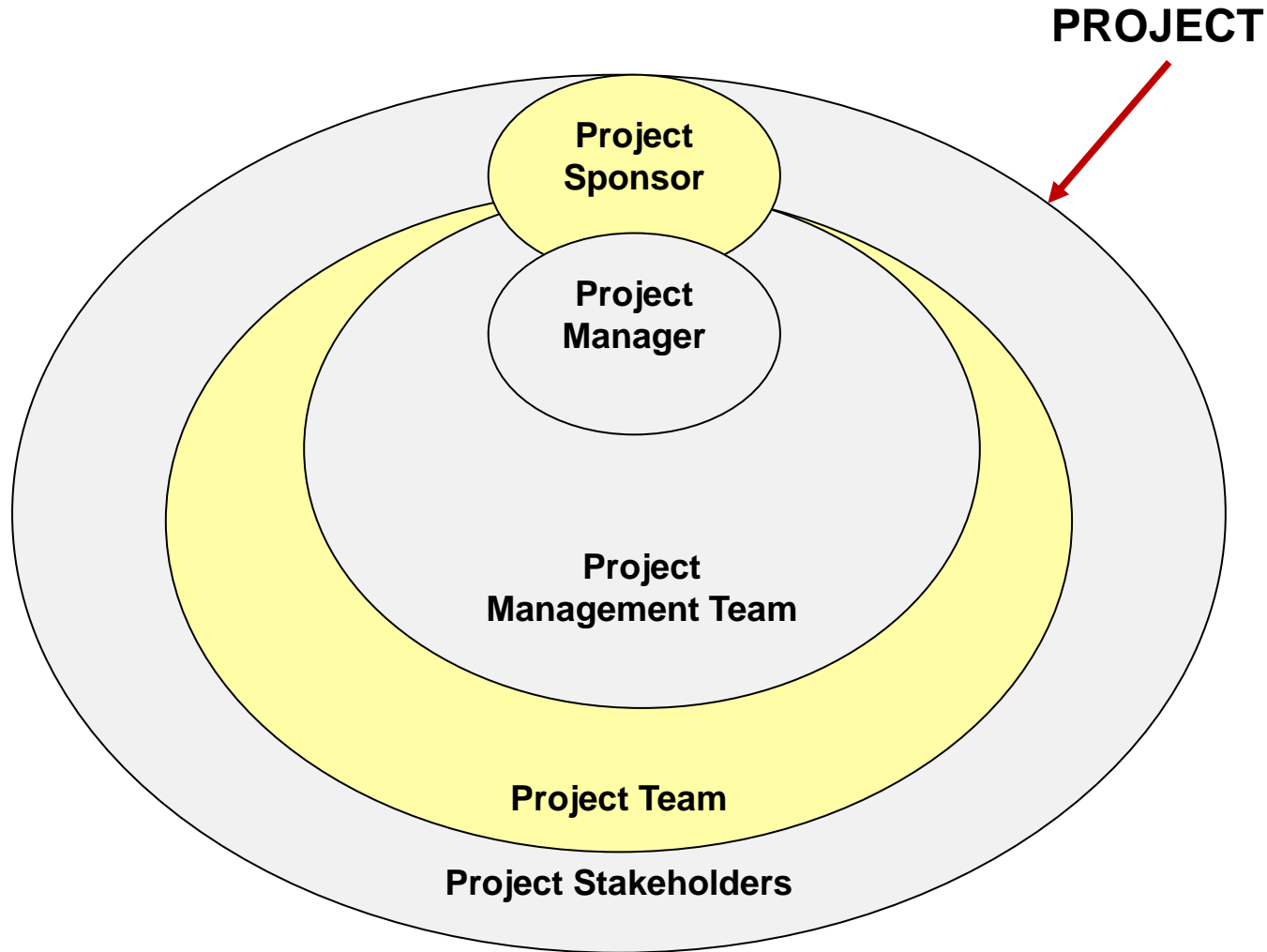


Interested parties and Project Cycle



1.02 Interested parties

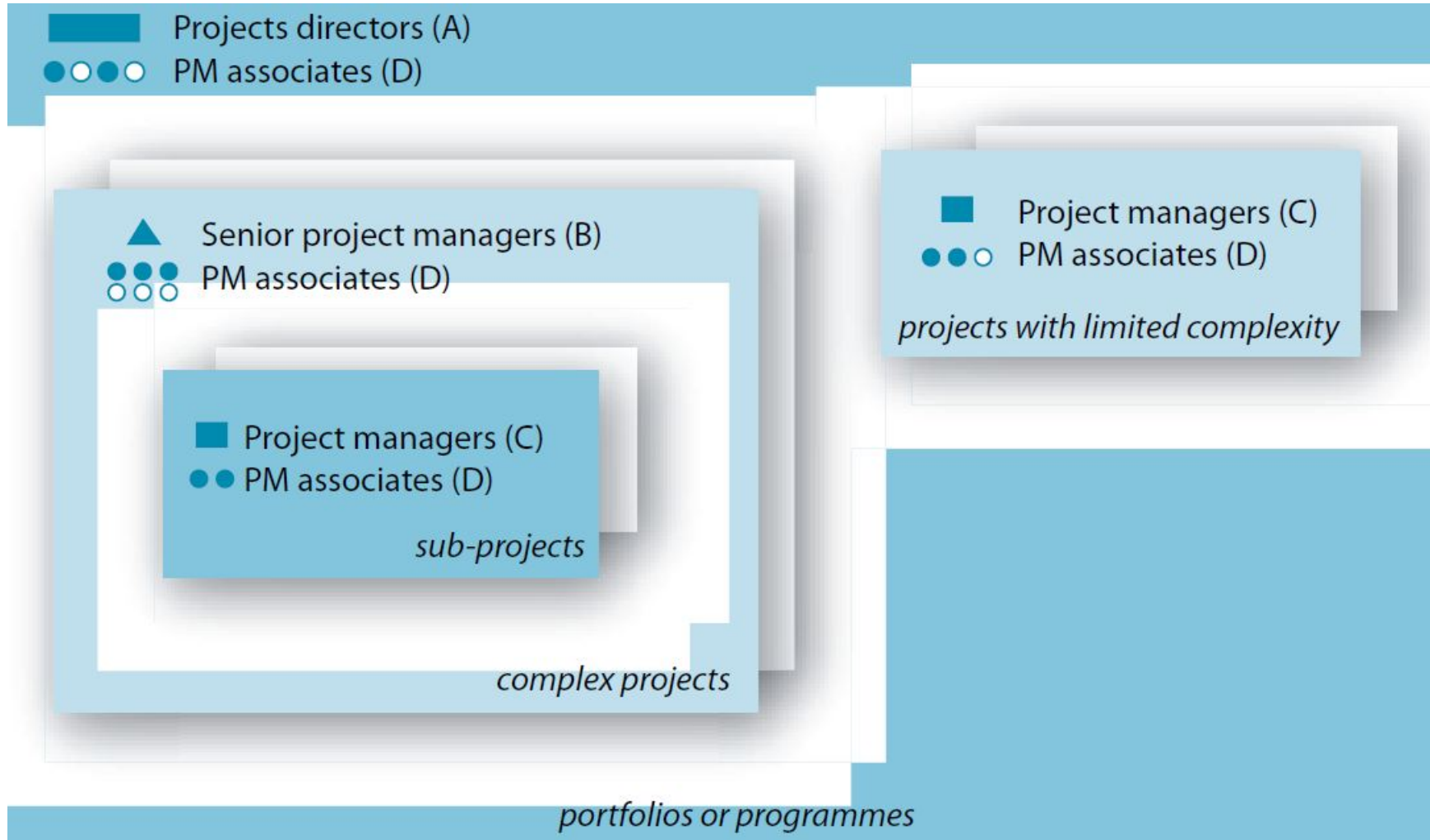
Relationship between Stakeholders and the Project



1.02 Interested parties



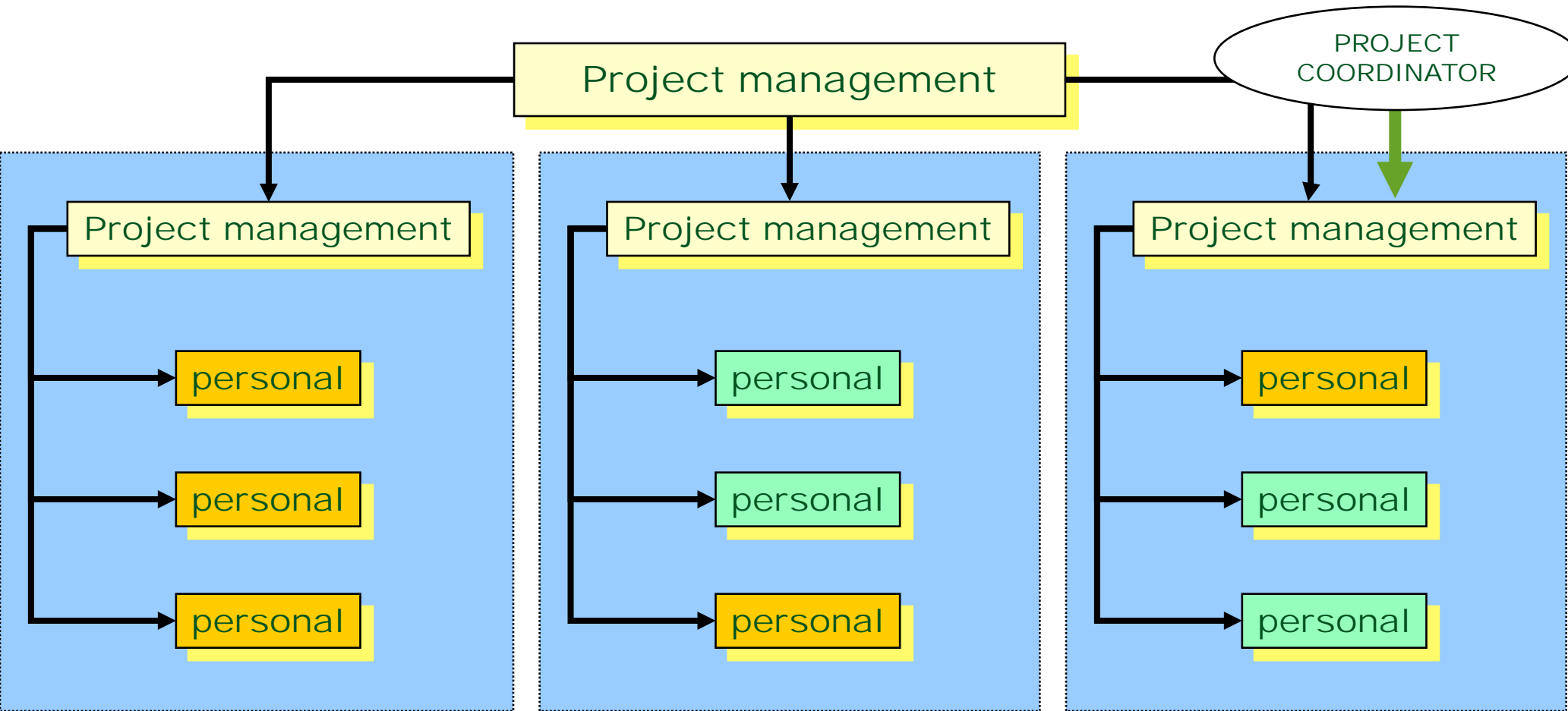
Levels of PROJECT MANAGEMENT



1.02 Interested parties



ORGANIZACIÓN POR PROYECTOS



Orange blocks represent staff engaged in project activities

1.02 Interested parties



Professionals in Rural-Local Development Project Management

- **Project Management assistant (TPD)**
- **IPMA Level D**
 - Experience is not mandatory in project management competence elements, but it is an advantage if applicants have already applied somehow their knowledge in project management.
 - She/he will have **expertise** in project management in all competence elements.
 - **She/he can act** on any project management competence element.
 - She/he can work as specialist in some fields.
 - She/he is member of a project team or member of the project management staff.
 - **Knowledge** is evaluated only in a written exam.

1.02 Interested parties



Professionals in Rural-Local Development Project Management

- **Certified Project Manager**
- **IPMA Level C – PDP**
 - **Has has least three years of project management experience.**
 - Is responsible of leadership functions in limited complexity projects.
 - **Is able to manage projects with limited complexity or to manage a sub-project of a complex project** in all competence elements of project management.
 - » Applies common project management processes, methods, techniques, and tools.

1.02 Interested parties



Professionals in Rural-Local Development Project Management

- **Project Manager**
- **IPMA Level B – DP**
 - Has **at least five years of project management experience**, of which three years were in responsible leadership functions of complex projects.
 - Shall be able to **manage complex projects**.
 - Is responsible of all competence elements for the management of a complex project.
 - Has a general management role as manager of a large project management team.
 - Uses adequate project management processes, methods, techniques and tools.

1.02 Interested parties



Professionals in Rural-Local Development Project Management

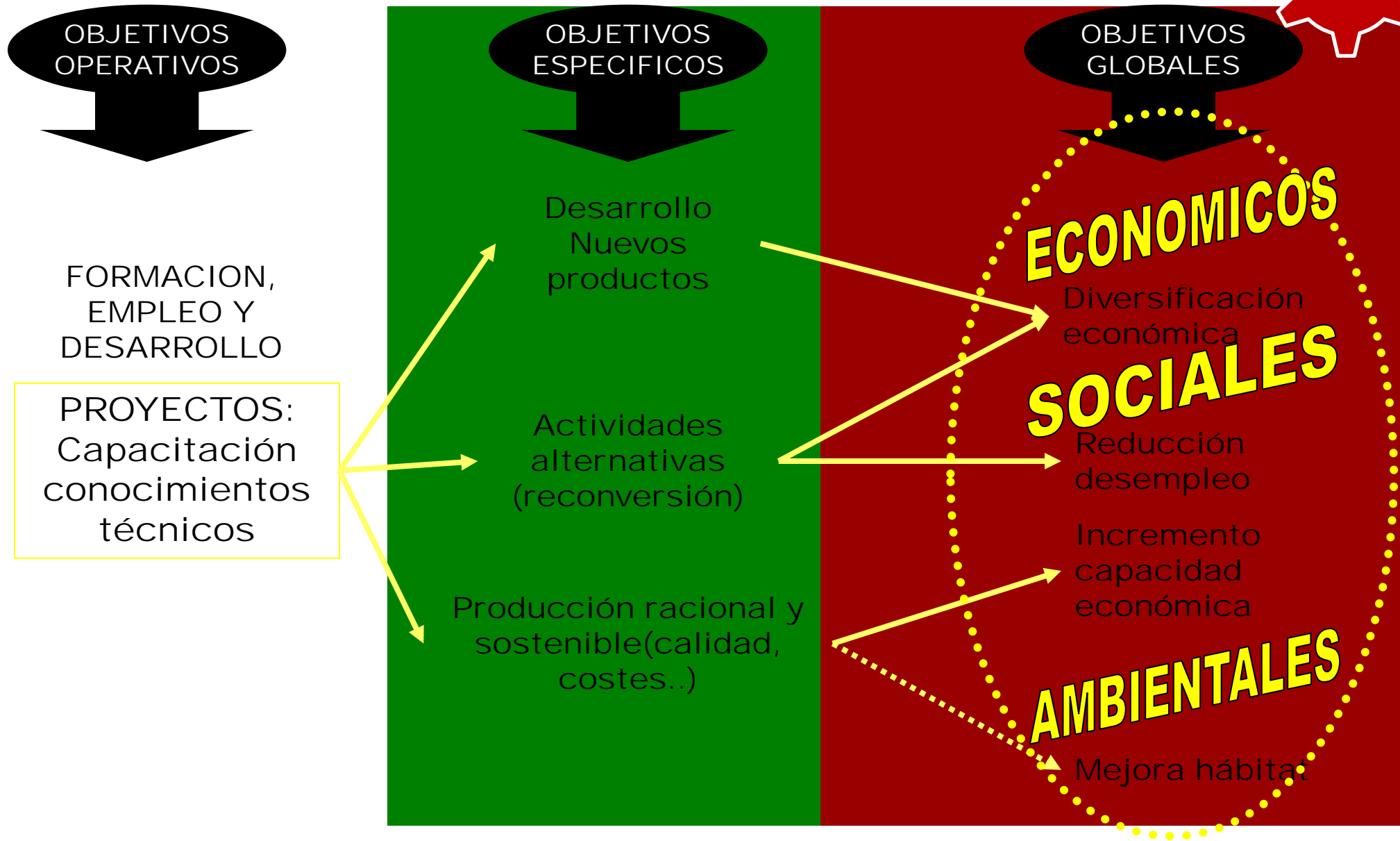
- **Programs Director or Projects Director**
- **IPMA Level A – DPP**
 - Has at least five years of experience in **portfolio Management, Program management or multi-project management**, of which three years were in responsible leadership functions in the Portfolio management of a company/organization or a business unit or in the management of important programs.
 - Shall be able to manage portfolios or programs.
 - Is responsible for the management of an important portfolio of a company/organization.
 - Contributes to Strategic management. Develops project management staff and coaches project managers.

1.03 Requirements and objectives



- **Requirements** are the identification, definition and agreement of a project to meet the **needs and expectations of interested parties**, especially customers and users.
 - They are **conditioned by opportunities and threats**.
- The **objective** of a project is to provide value to the interested parties.
 - The objective of a project is **to produce the agreed final outcomes**, especially the **deliverables**, in due date, within the budget and acceptable risk parameters.
 - A project strategy is a high level perspective of how to achieve the project objective.

1.03 Project requirements and objectives



1.04 Risk and opportunities



... according to the scope of project: Territorial context

→ **Physical resources**

Human Resources



External Relationship

Image and perception

Activities and employments

Administration and democracy

Culture and identity

Technical knowledge and competencies

1.04 Risk and opportunities



Opportunities and threats: initial diagnosis

- More than a mere snapshot
- **First implication stage of populations and key agents mobilization**
- Usage of **participative methods**
- Preparation of alternative planning



1.05 Quality



- **Quality of a project**
 - **Is the degree of which a set of inherent characteristics satisfies its requirements.**
 - **It embraces all phases and parts of the project:**
 - **From its initial definition to the project processes, team management, its deliverables and its closure.**
 - **Its is a set of characteristics of a project or service which confers its ability to meet expressed or implicit needs (UNE 66-001-00).**

1.06 Project organizations



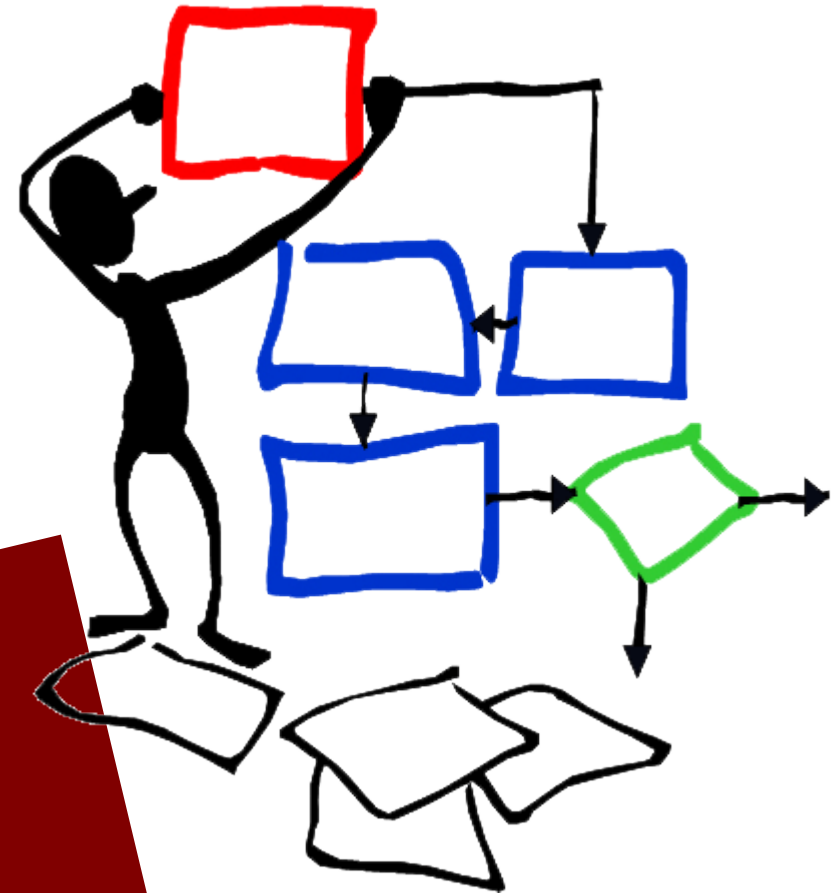
- **A PROJECT IS AN OPERATION WHERE HUMAN, FINANCIAL AND MATERIAL RESOURCES ARE ORGANISED IN SUCH AN ORIGINAL WAY TO PERFORM AN UNIQUE SET OF WORKS ... TO ACHIEVE BENEFICIAL CHANGES ... (IPMA, 2001).**

"Teamwork".
"Requirements and objectives"
Technical competences
"Permanent organizations"
Contextual competences 2.05

1.06 Project organizations



- **THE PROJECT CAN BE CONSIDERED AS A SOCIO-ECONOMICAL ORGANIZATION THAT DEVELOPS A SERIES OF ACTIVITIES WITH THE SAME AIM, AND THAT IS AUTONOMOUS**



"Teamwork".
"Requirements and objectives"
Technical competences
"Permanent organizations"
Contextual competences 2.05

- 1.07 Teamworks
- 1.08 Problem resolution



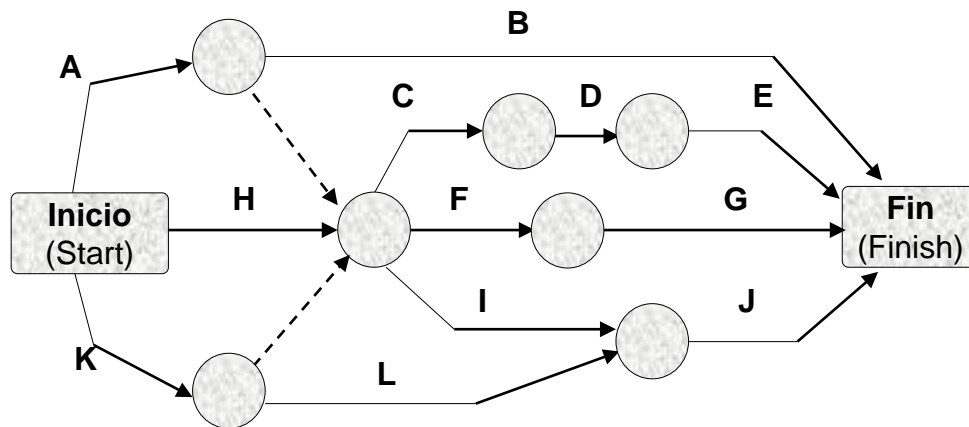
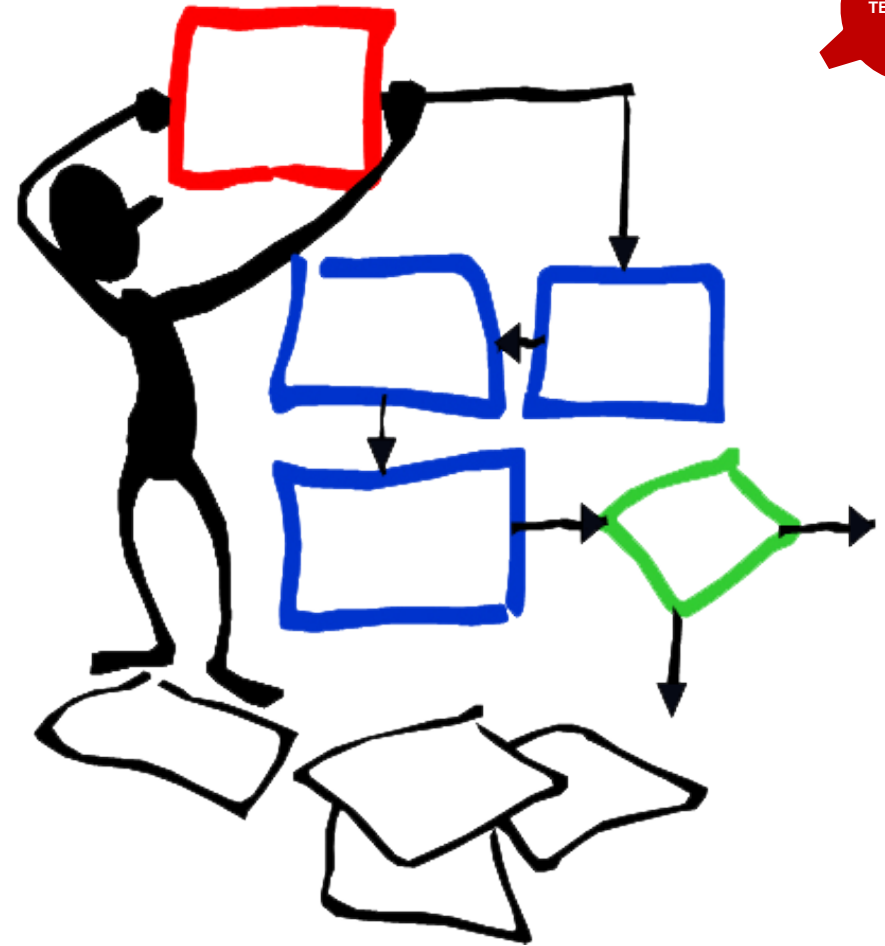
In behavioral competences

1.09 Project structures

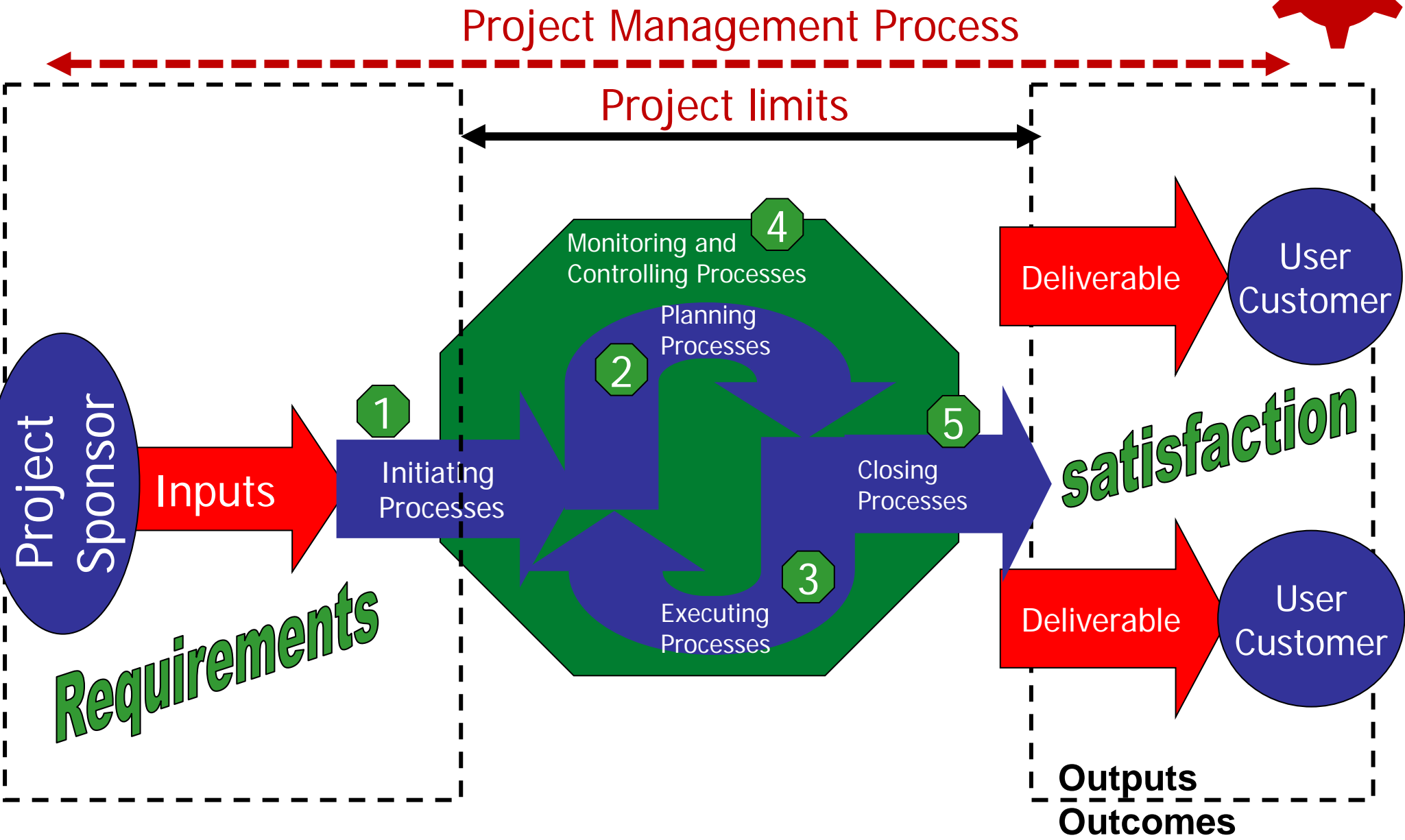


E.D.P. workshop

Logical Relationship



1.10 Scope and deliverables



1.11 Time and project phases



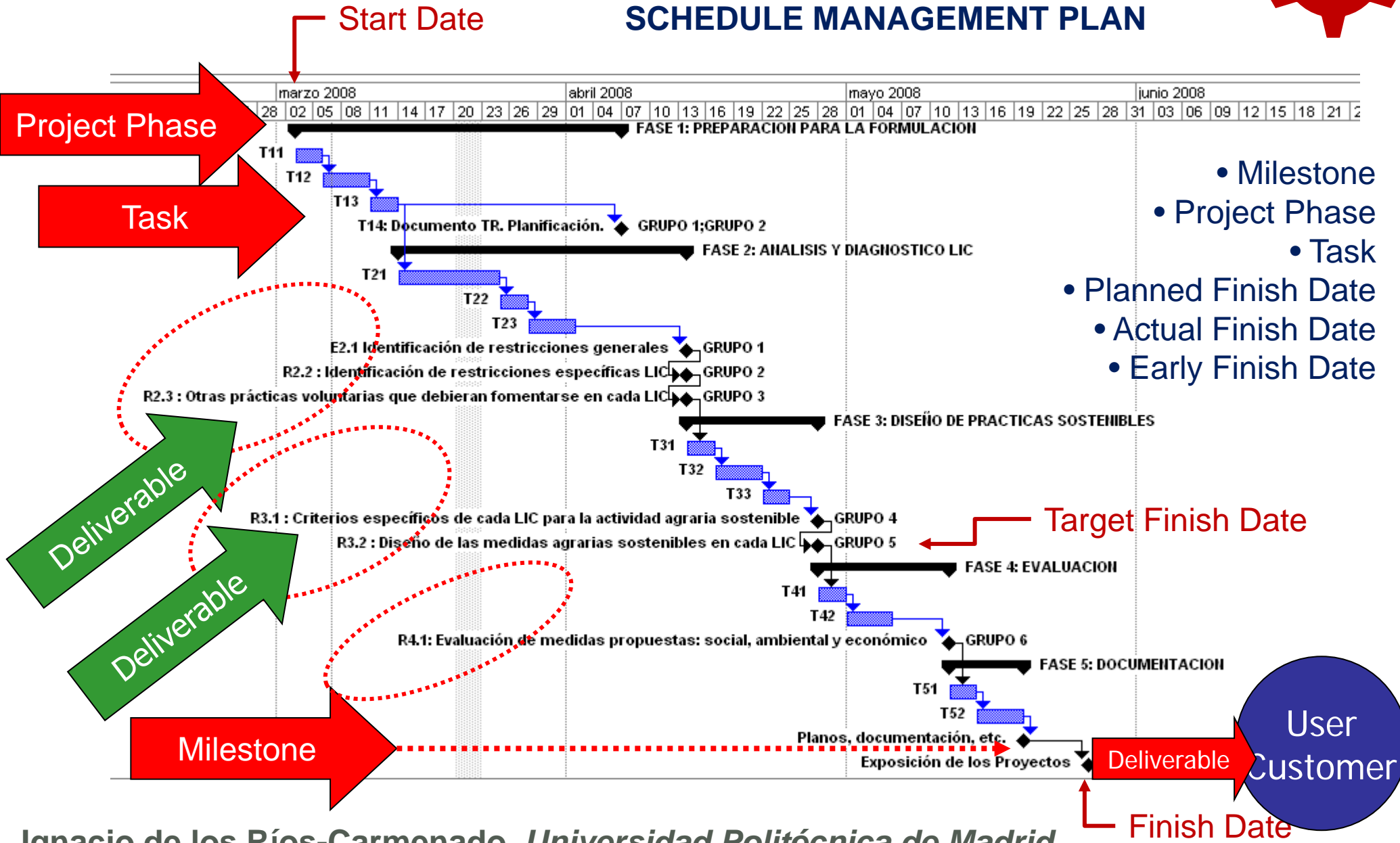
- **Time** is an essential variable in projects.
 - Political, economical and social realism requires a development timing and a specific action program.
- **“Project cycle”**:
 - Is a model that explains and allows decision making in a systematic way
 - It has a life cycle
 - As well as living beings, the project is “born, grows, develops, is productive and dies”
 - The project has a duration.
 - » Starts and ends
 - » Is born and dies.

1.10 Scope and deliverables

Project Scope Management



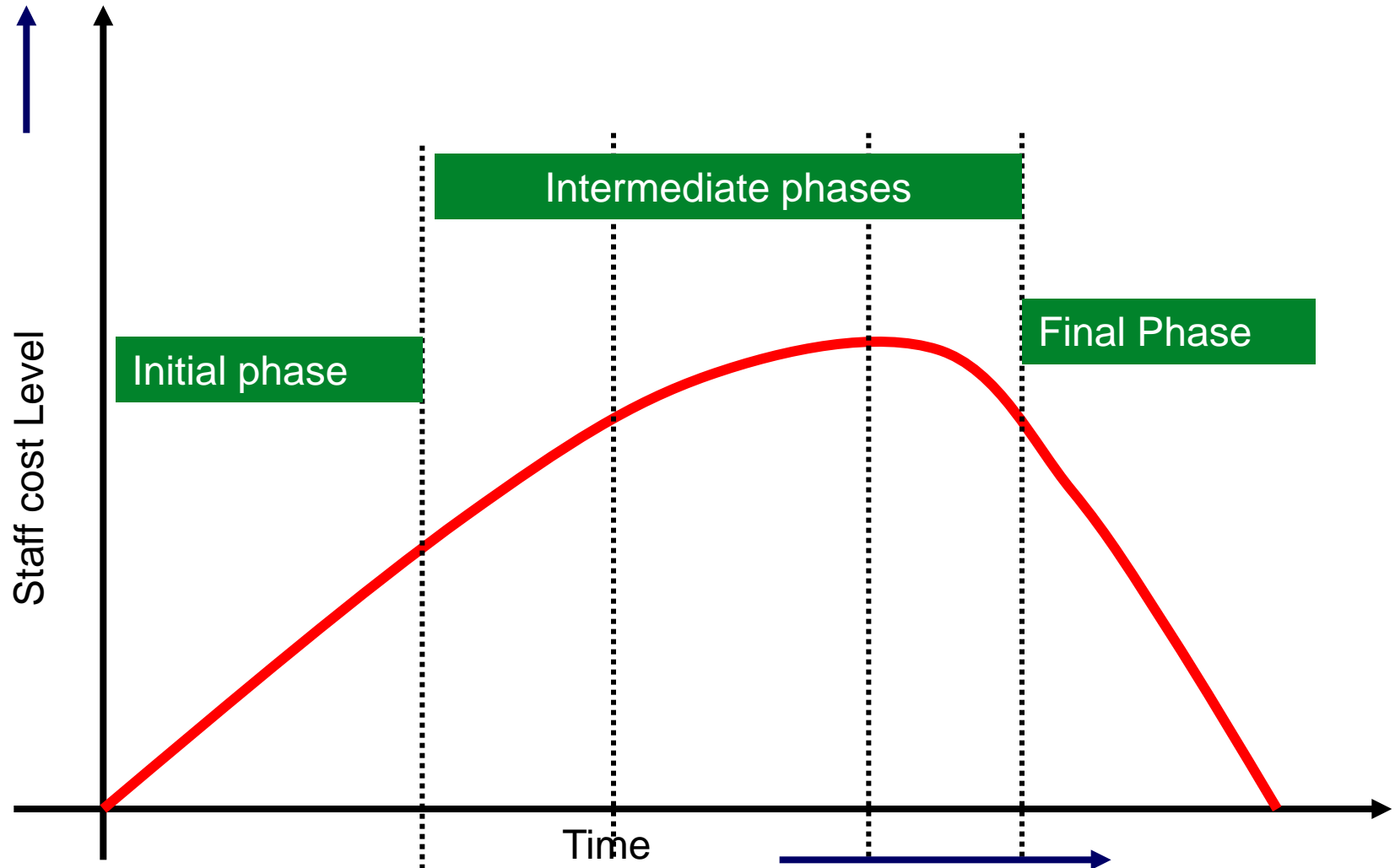
SCHEDULE MANAGEMENT PLAN



- Milestone
- Project Phase
- Task
- Planned Finish Date
- Actual Finish Date
- Early Finish Date

1.11 Time and project phases

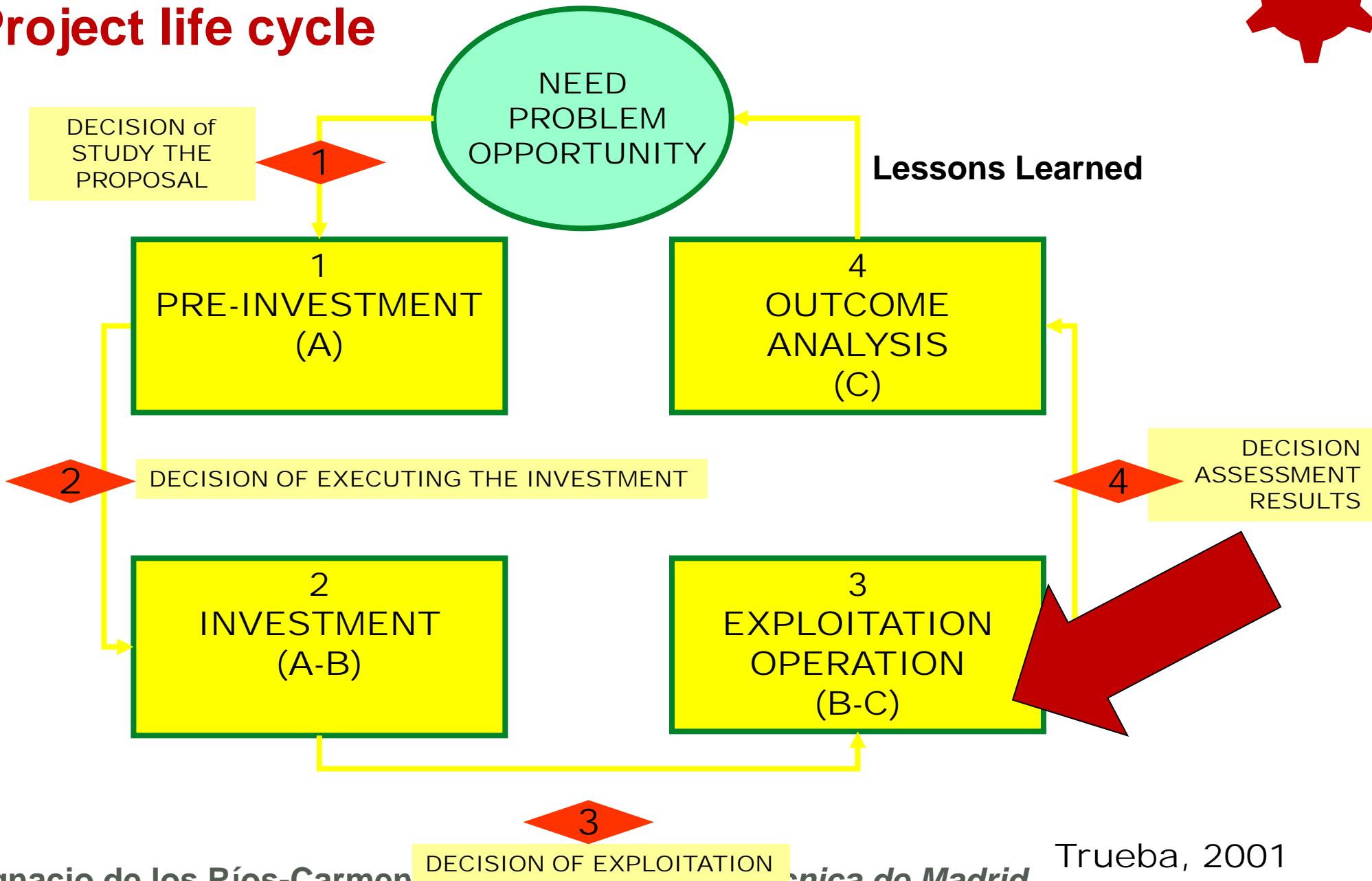
Project life cycle



1.11 Time and project phases

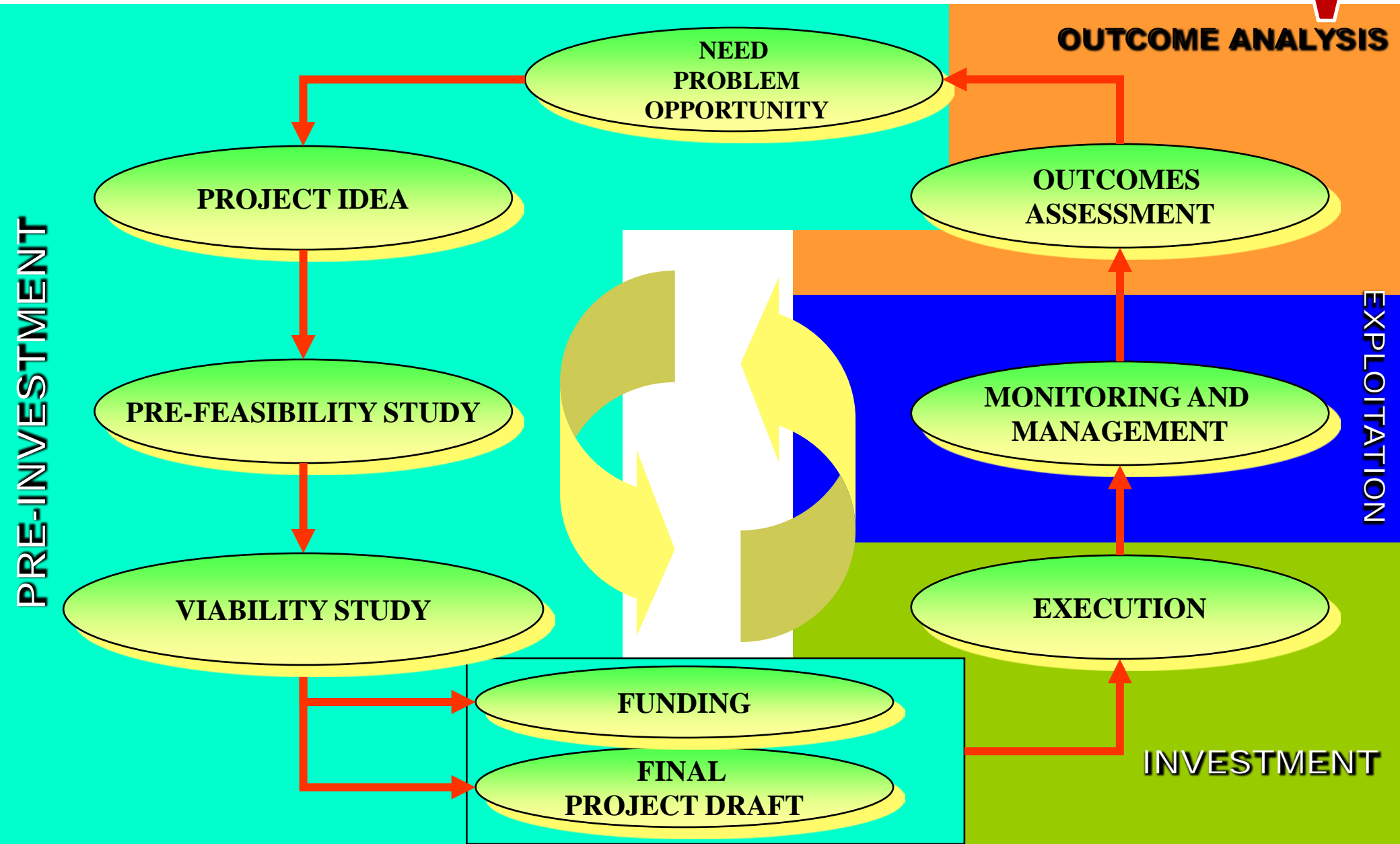


Project life cycle

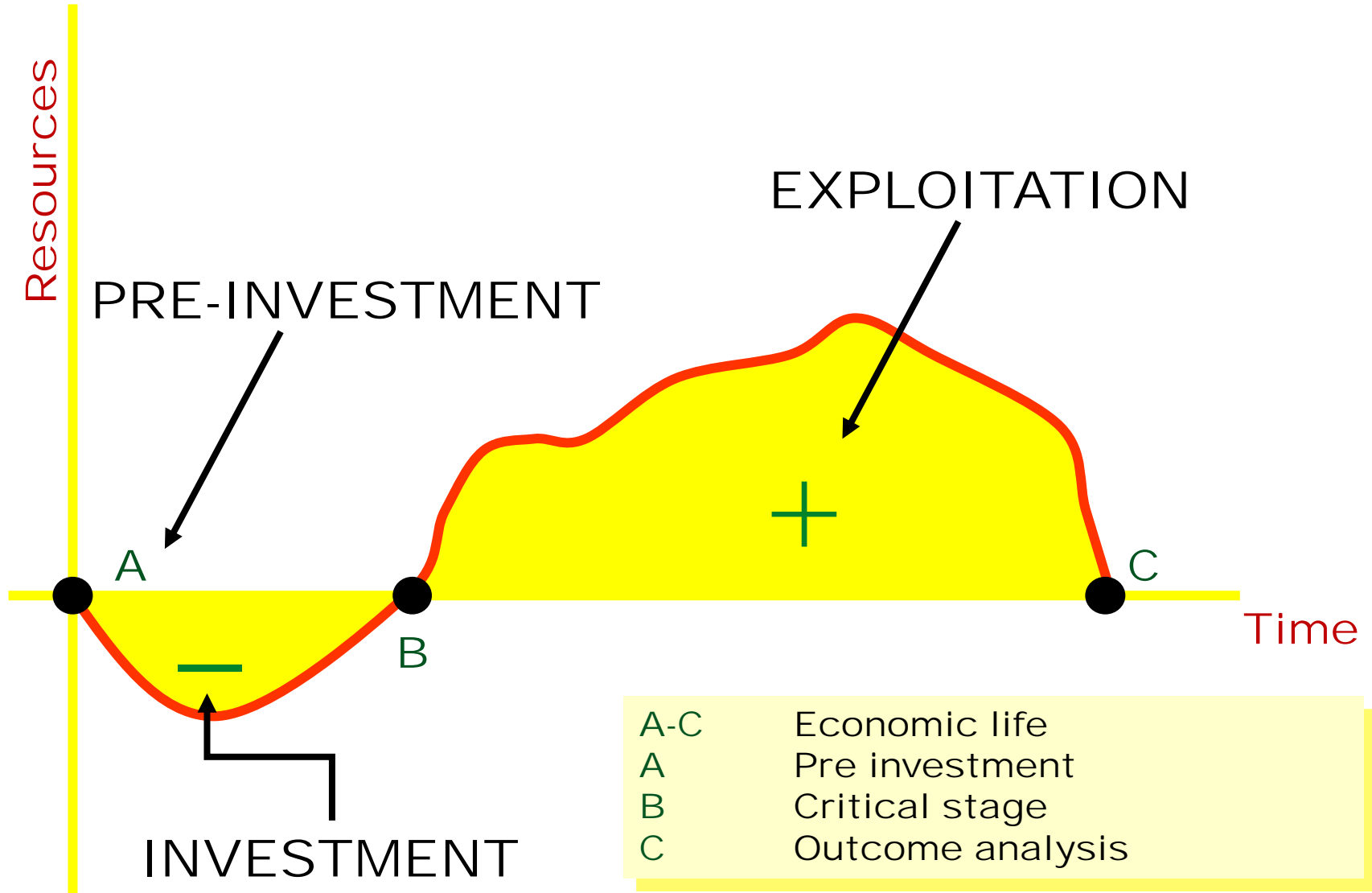


1.11 Time and project phases

Project life cycle: phases



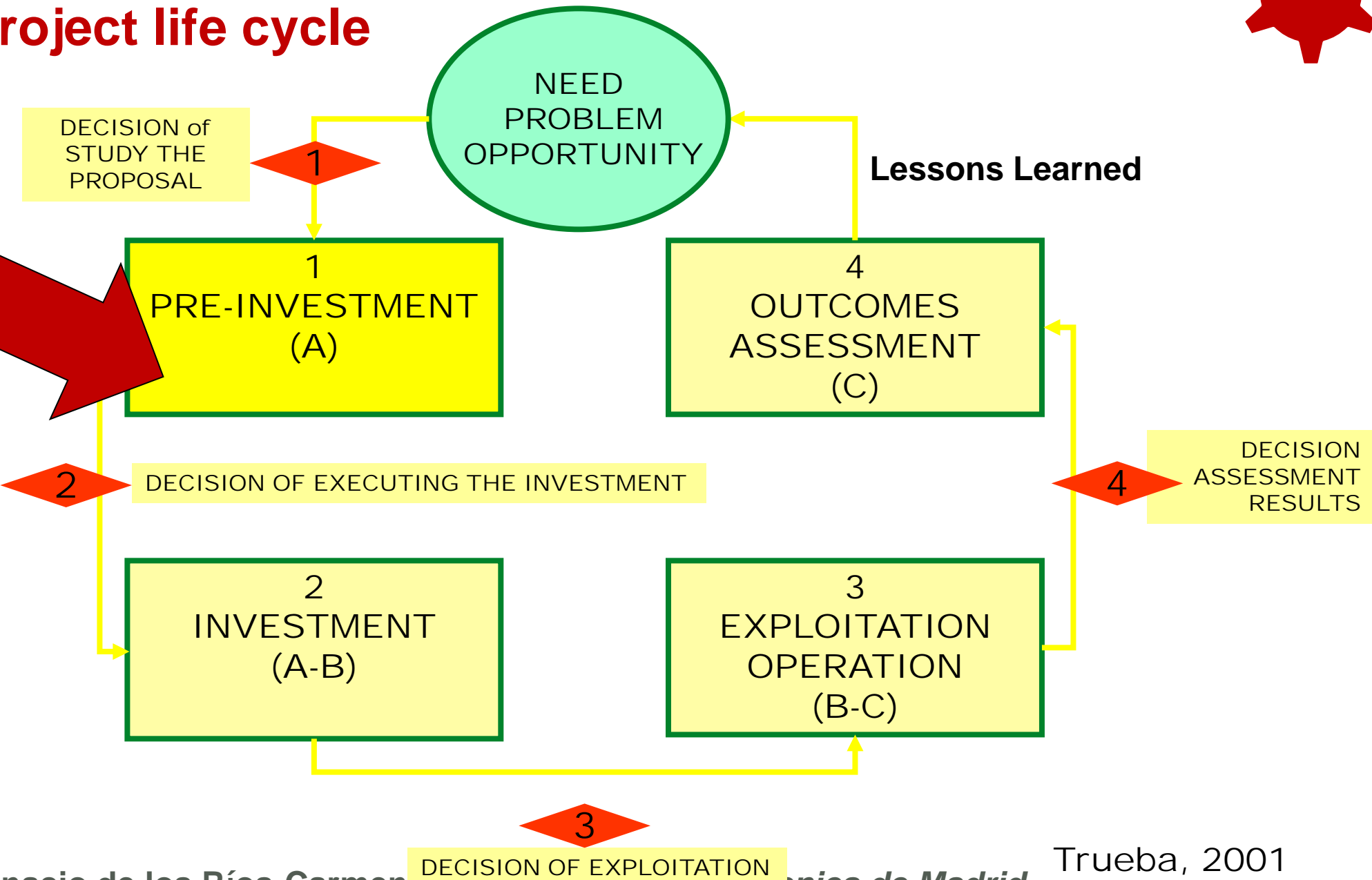
1.11 Time and project phases



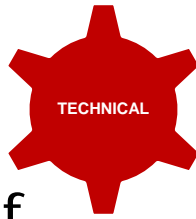
1.11 Time and project phases



Project life cycle



1.11 Time and project phases

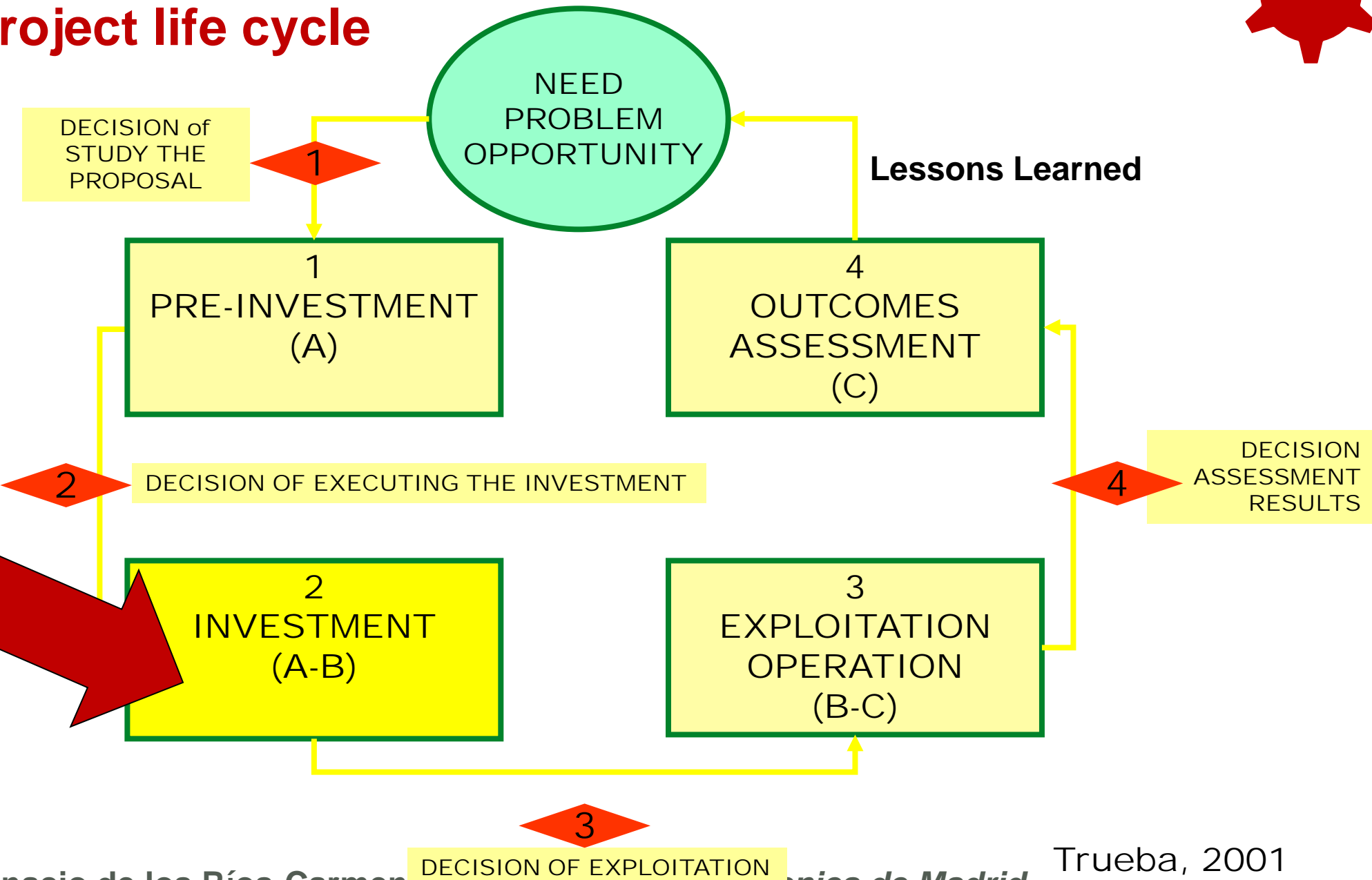


- A.- The first part of cycle is the identification and formulation of project: This is what economists call **PRE-INVESTMENT**
 - There is a set of documents in identification and formulation
 - » Idea
 - » Pre-feasibility study
 - » Feasibility study
 - » Funding
 - » Final project
 - Gradually performed, with increasing **detail**, **effort** and **cost** and with promoter decisions at the end of each one.
 - The objective of this phase is to **discard bad as soon as possible** at a minimum cost.
- **Social integration** is vital in all life cycle phases of a project to its success

1.11 Time and project phases



Project life cycle

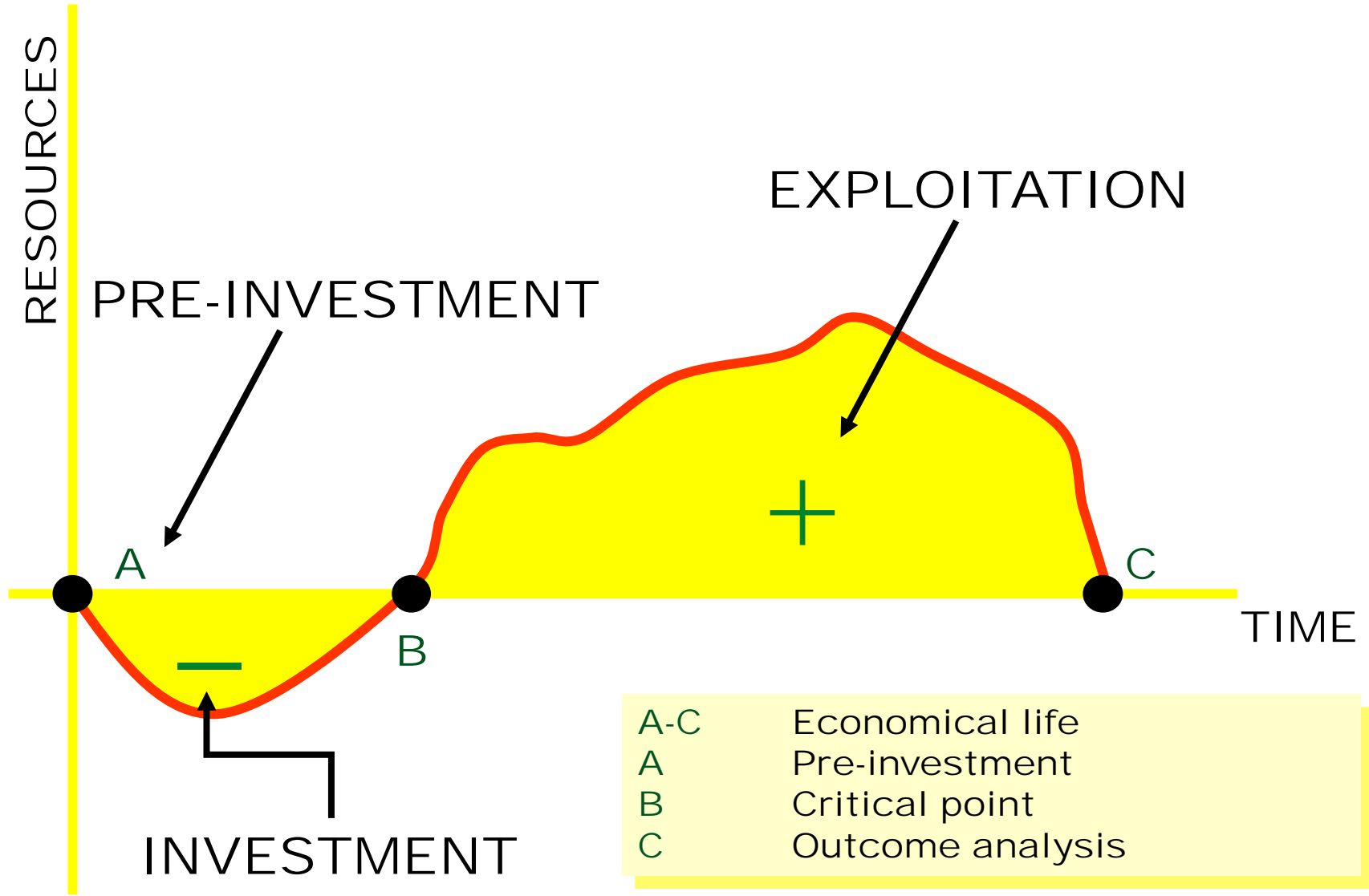


1.11 Time and project phases



- The second part is focused on the MATERIALIZATION OF **INVESTMENTS** (A-B)
 - The documents of first part become specific actions that modify reality.
 - Before starting this phase, the promoter or promoters have to take the critical decision of performing with all consequences.
 - **Scarce resources are immobilized** with the aim to progress and achieve future benefits.
 - But currently, in this phase, only appeared the **costs**.

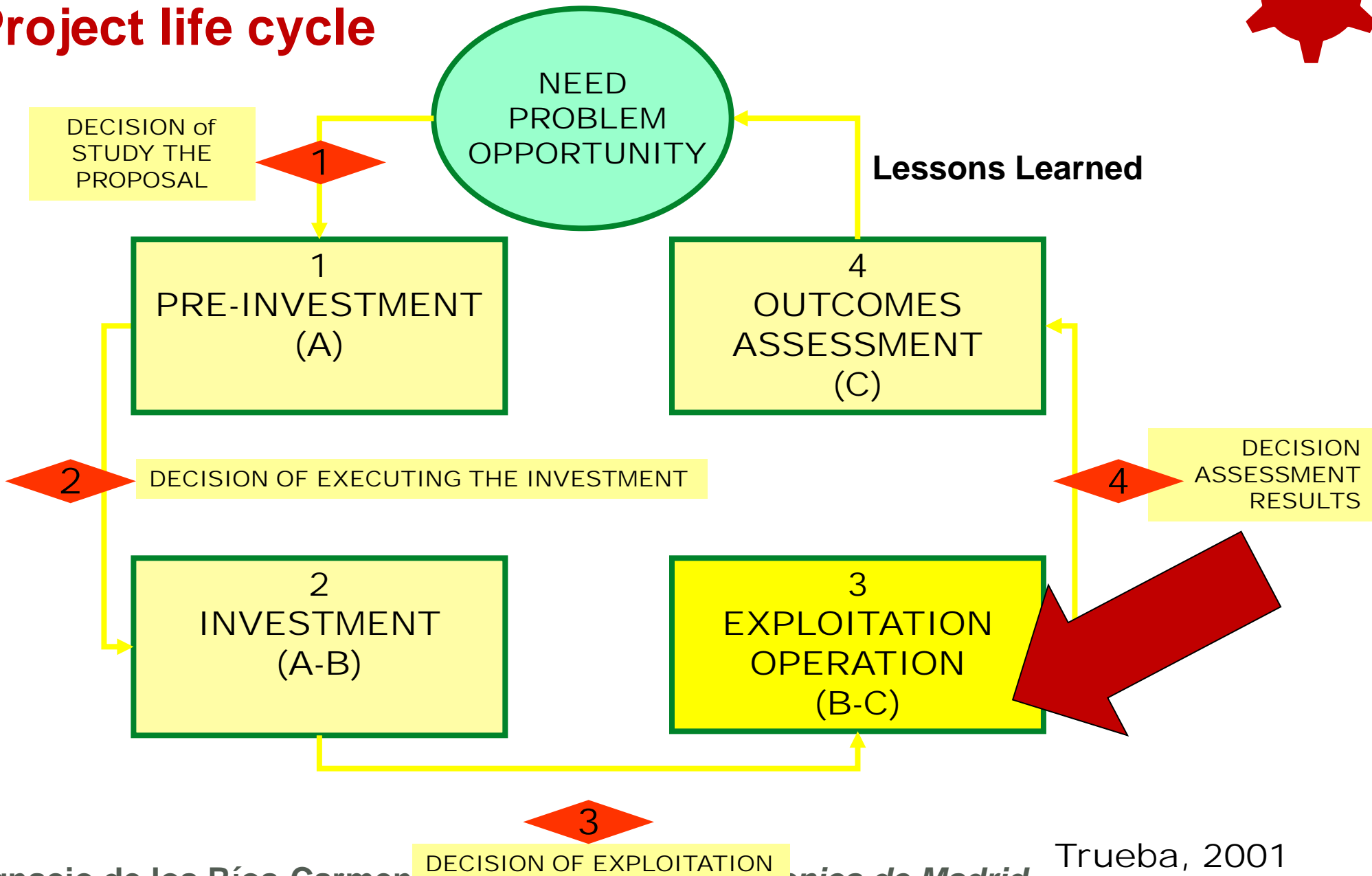
1.11 Time and project phases



1.11 Time and project phases



Project life cycle



1.11 Time and project phases

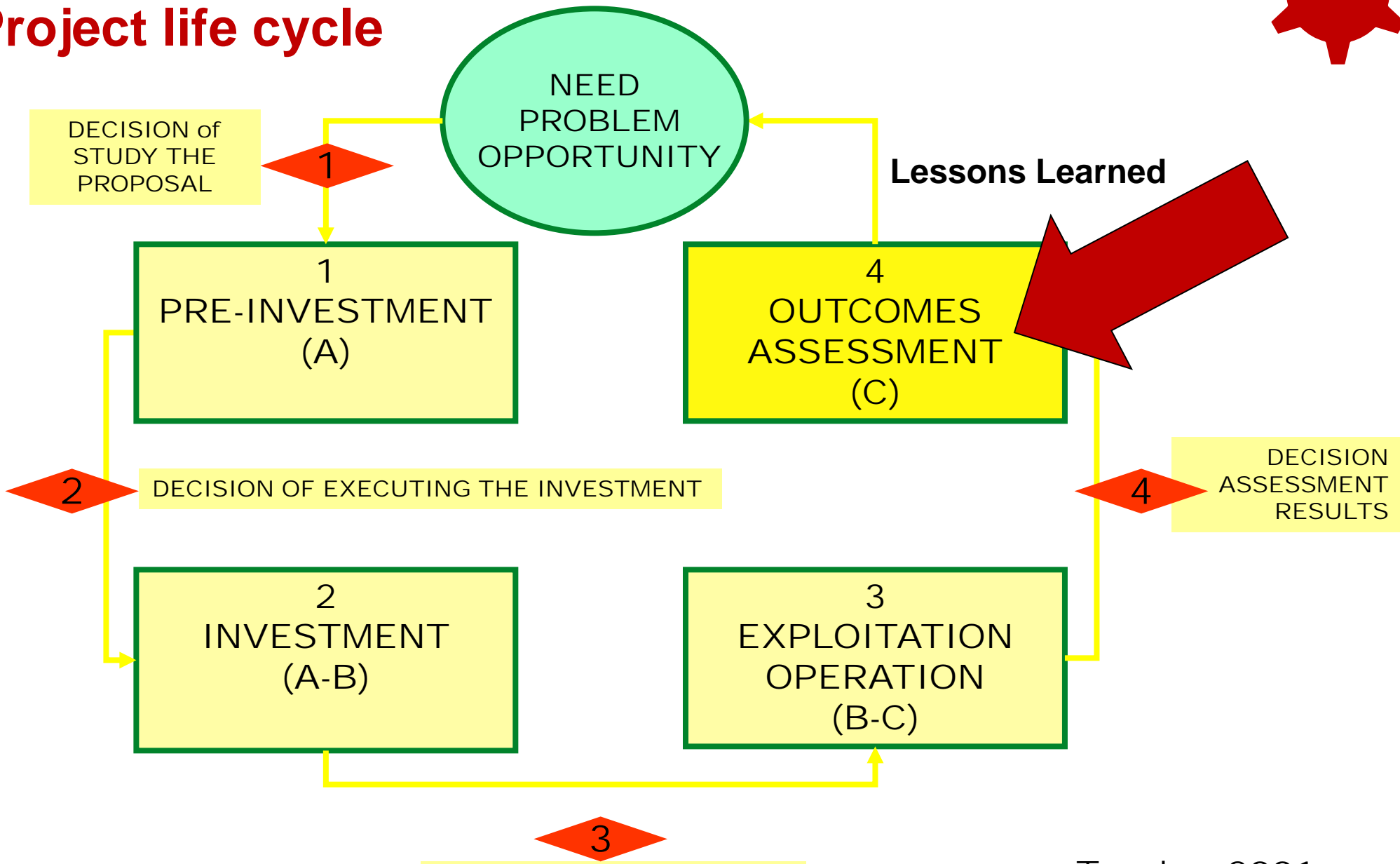


- Third part is PROJECT MANAGEMENT, also known as administration and **EXPLOITATION and OPERATION** of project.
 - The **positive aspects of change** have to be shown in this phase.
 - It is the **fructification** of project: **Outcomes**
 - » “Time to harvest what was sown with effort”.
 - Human and participative aspects of agents in a wide sense are crucial
 - Importance of Project Management
 - Manage **Stakeholders**
 - Manage Project Team
 - Social learning (Friedmann, 1993).
 - Is the moment of truth in projects (Cicourel 1986).
 - There must be in this phase a balance between
 - » knowledge,
 - » experience,

1.11 Time and project phases



Project life cycle

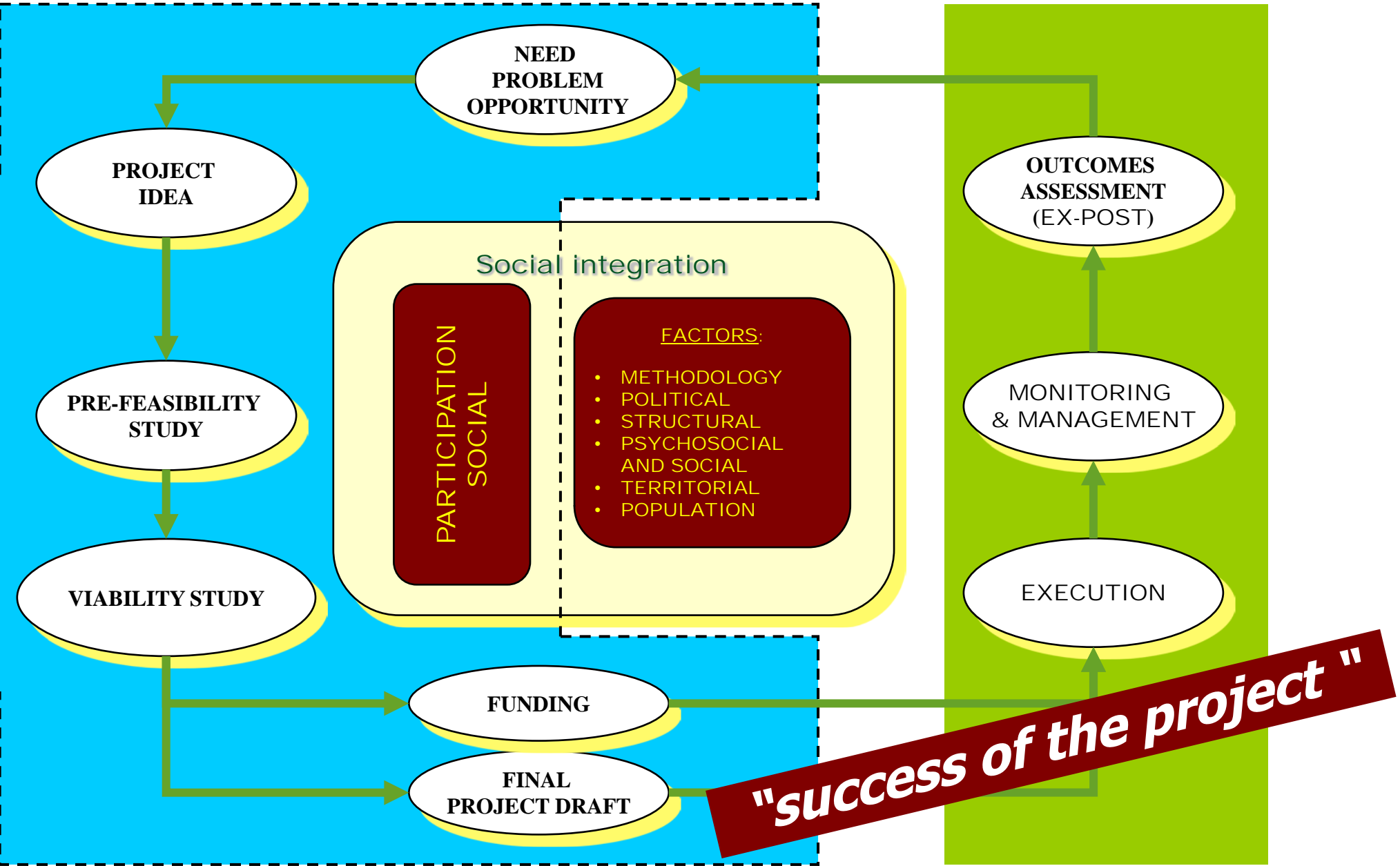


1.11 Time and project phases



- Fourth part is the OUTCOMES ASSESSMENT when project dies.
 - It is the time of an historical, calm and responsible reflexion of the project at the time it finishes
 - We have to extract experience lessons from each phase
 - Past **experience lessons**
 - » constitute the **essential source of future actions**.
 - » **Lessons Learned** are essential:
 - » Professional enhancement
 - » New projects
 - » Ongoing improvement

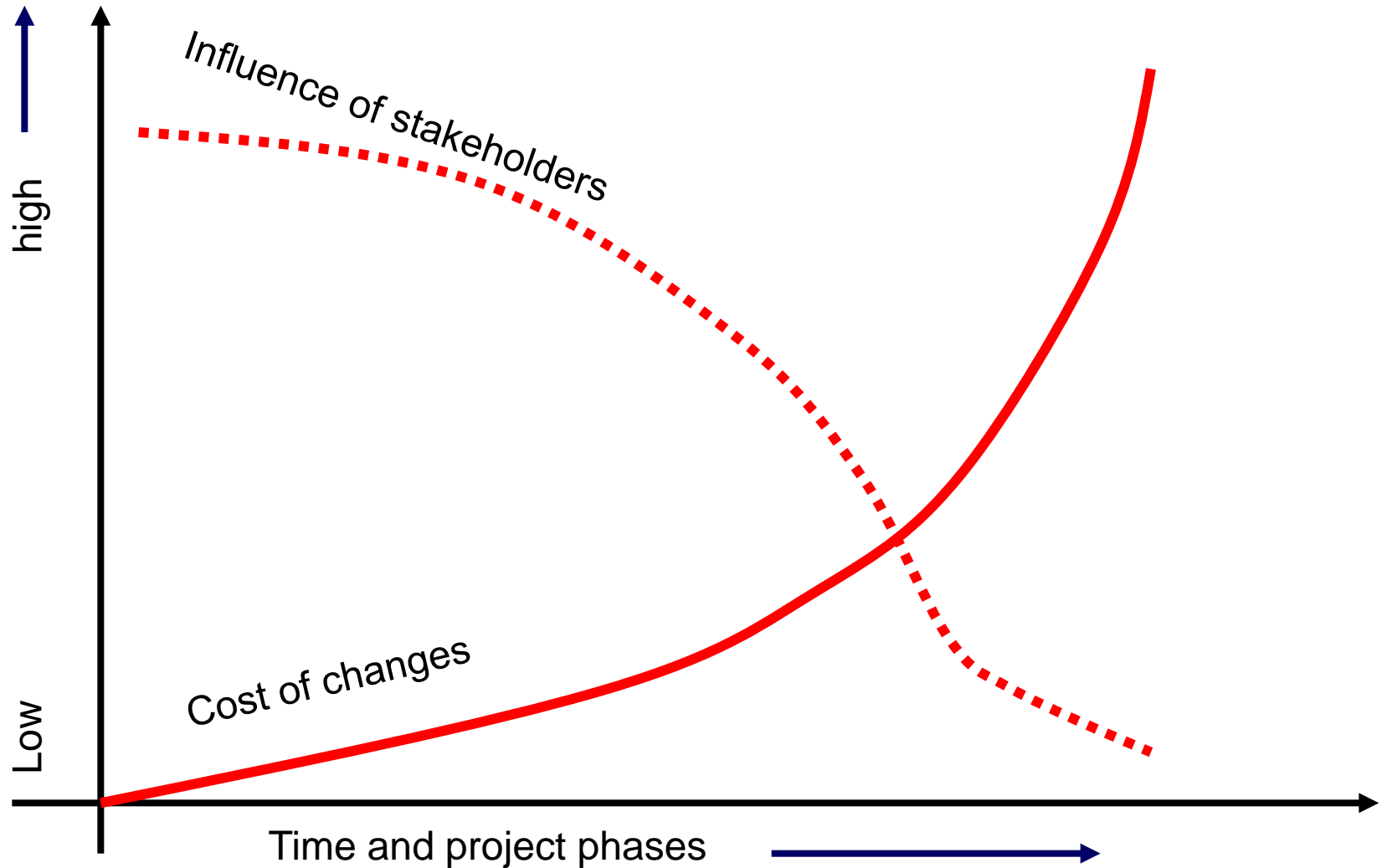
1.11 Time and project phases



"success of the project"

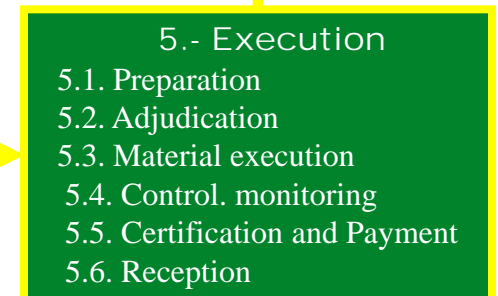
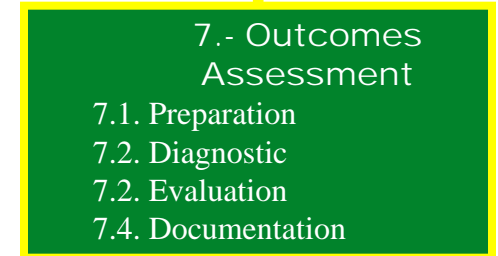
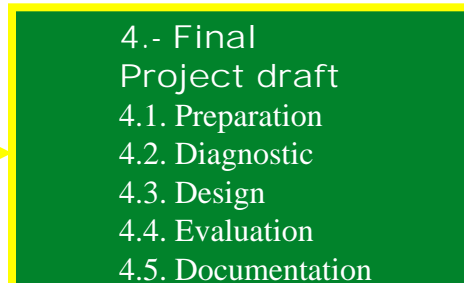
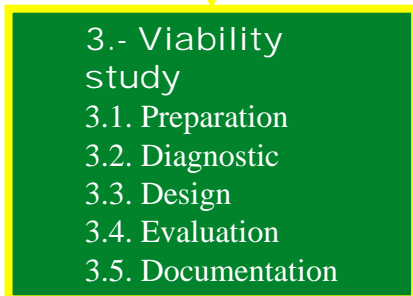
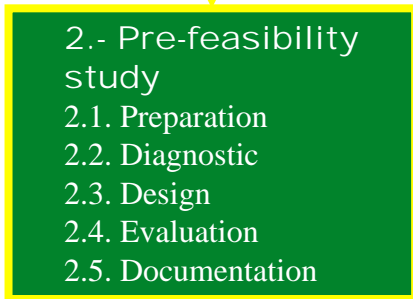
1.11 Time and project phases

Project life cycle: SOCIAL integration
Influence of interested parties over time

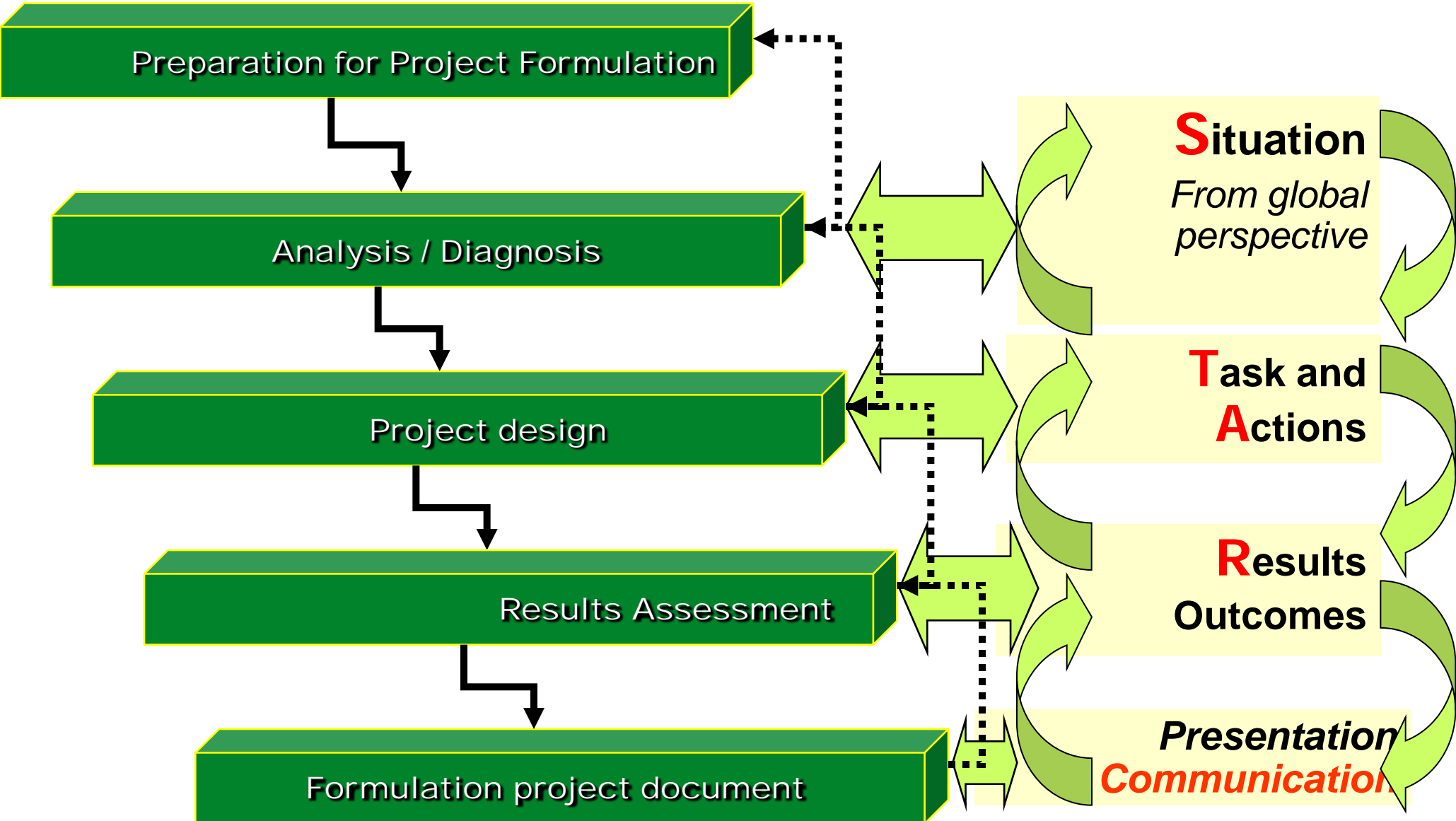


NECESIDAD
PROBLEMA
OPORTUNIDAD

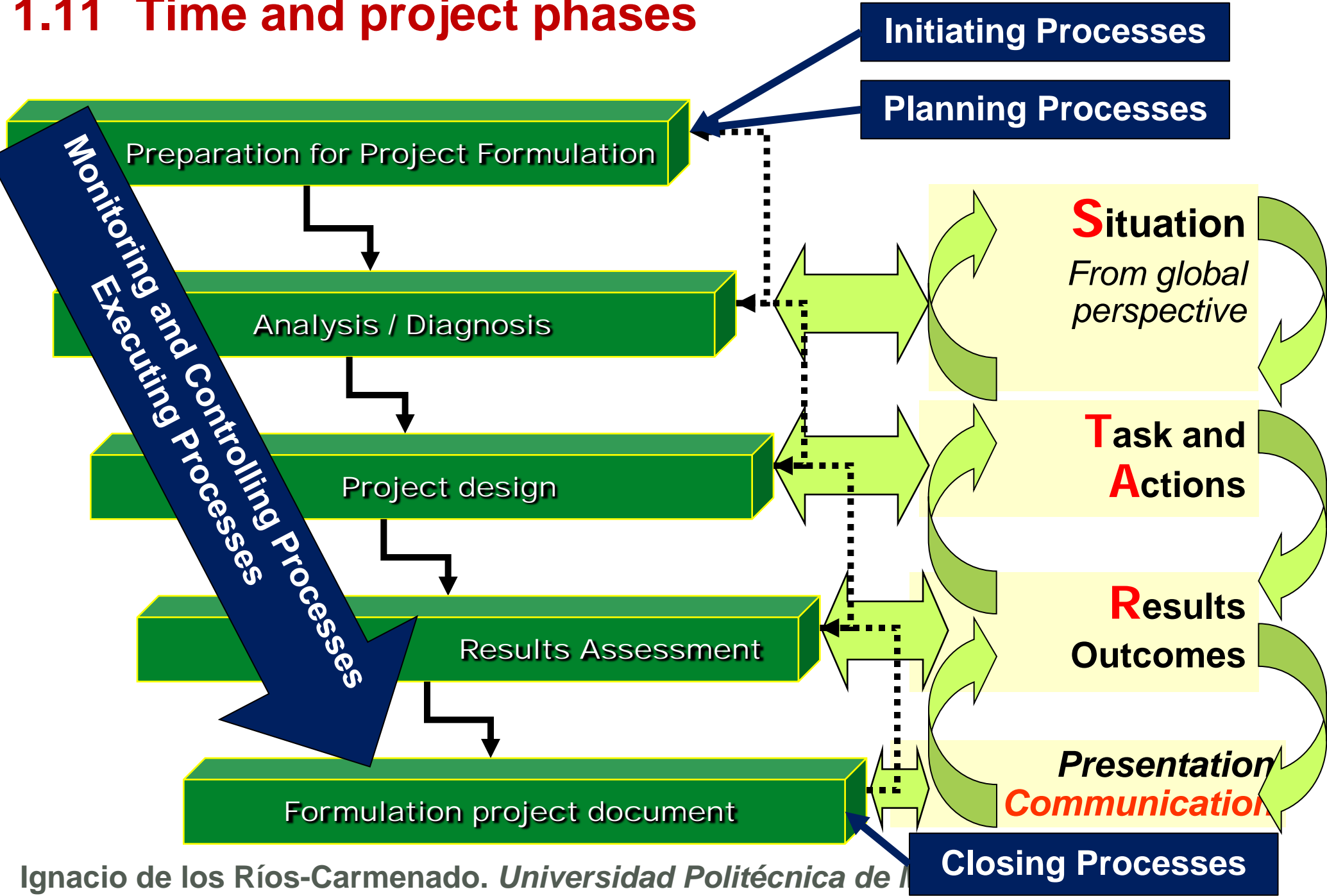
INTEGRACIÓN DE LAS ETAPAS METODOLOGIAS EN LAS FASES DEL CICLO DEL PROYECTO



1.11 Time and project phases

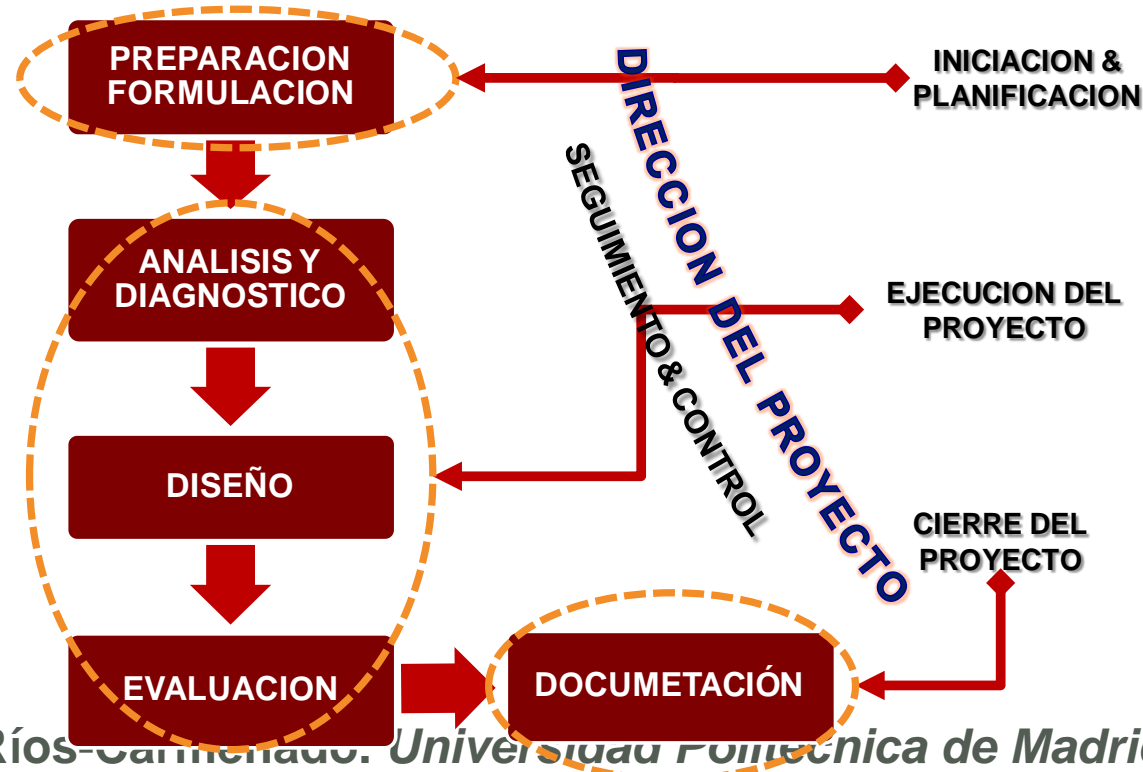


1.11 Time and project phases



1.11 Time and project phases

Phase	Process
→ Preparation for Project Formulation	<ul style="list-style-type: none"> • Initiating Processes • Planning Processes
→ Analysis / Diagnosis → Project design → Multicriteria Assessment	<ul style="list-style-type: none"> • Executing Processes
→ Monitoring and Controlling	<ul style="list-style-type: none"> • Monitoring and Controlling Processes
→ Formulation project document	<ul style="list-style-type: none"> • Closing Processes



1.12 Resources

- FROM THIS ECONOMICAL PERSPECTIVE A PROJECT IS AN **IMOBILIZATION** OF GOODS AND **SCARCE RESOURCES** (INVESTMENT) TO GENERATE A **FLOW OF GOODS** AND FUTURE SERVICES, SUSCEPTIBLE OF BEING **ASSESSED**.

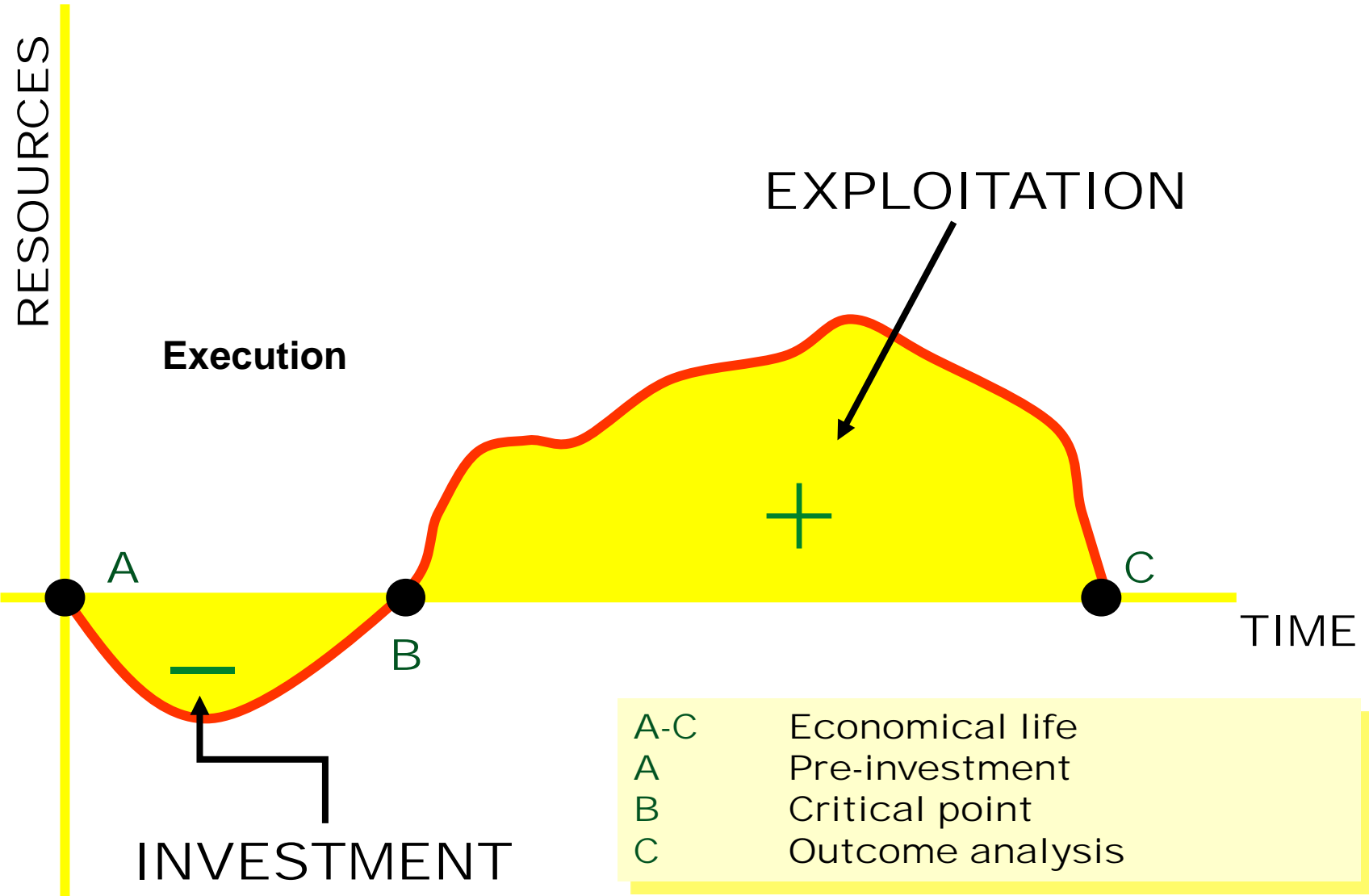
Human resources



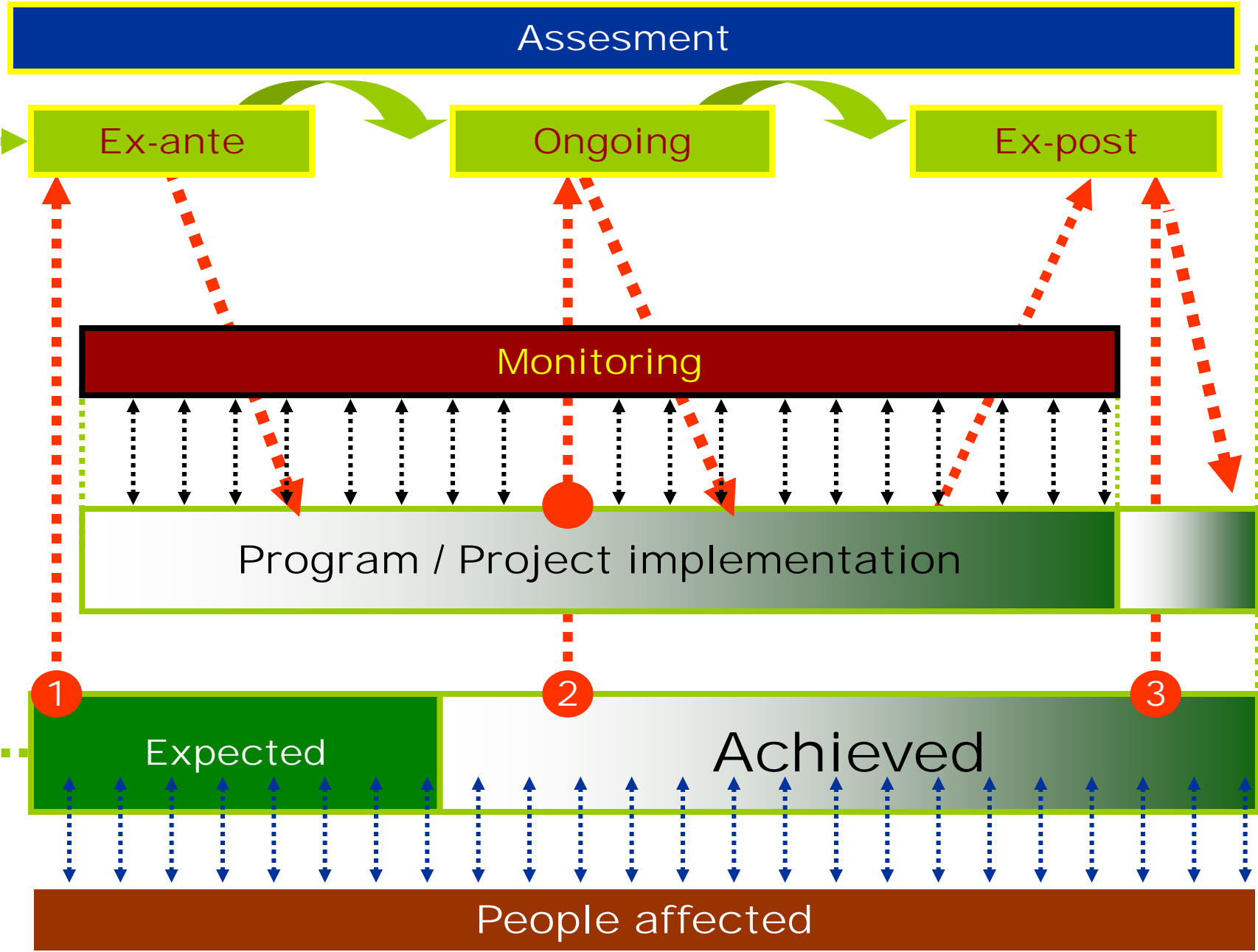
- Equipment
- Technology
- Equipment
 - Services
 - Supplies
 - Materials
- Budgets or funds
- Information



1.13 Costs and funding

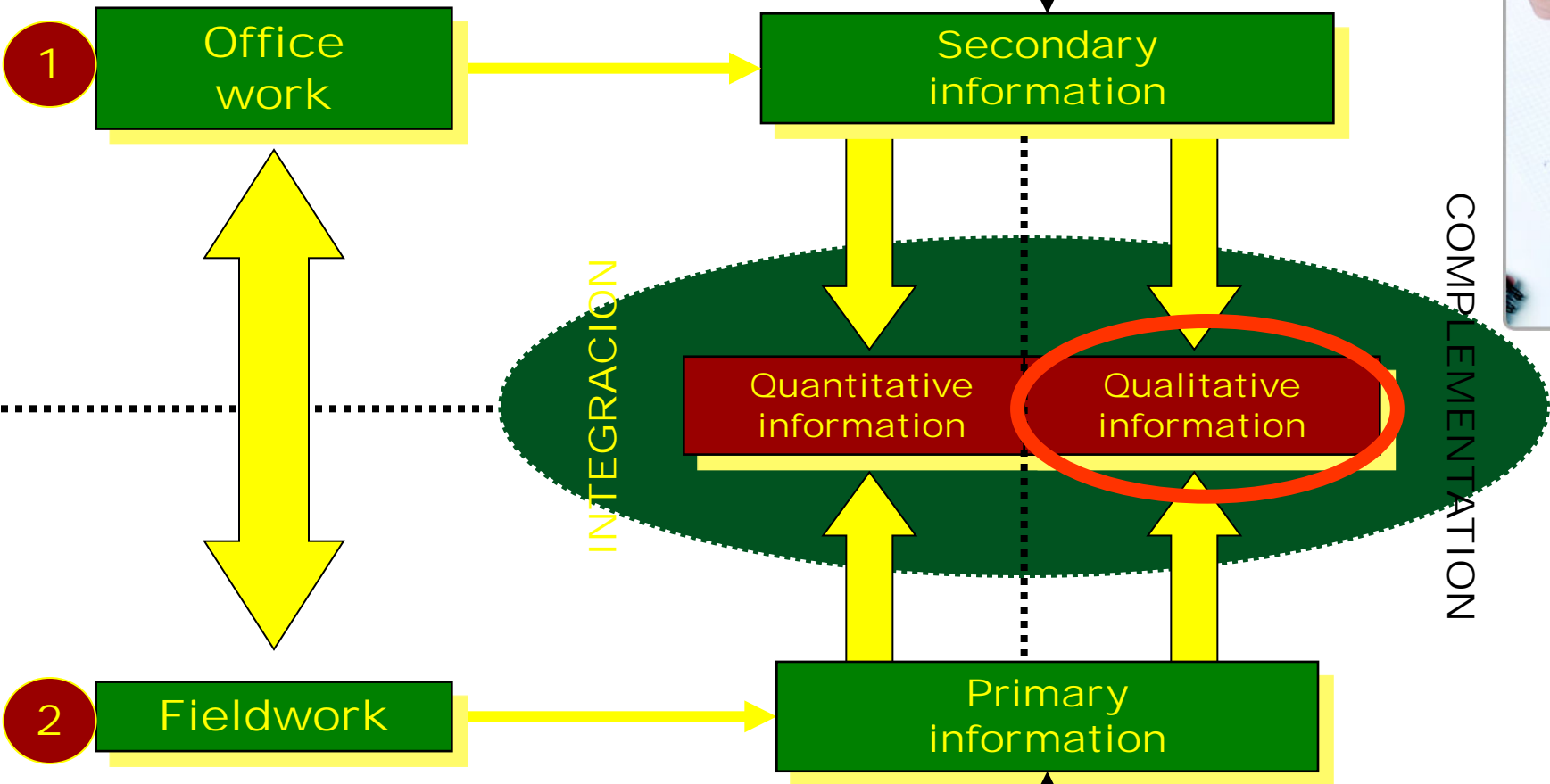


1.16 Control and reports



1.17 Information and documentation

Monitoring
Project document



Assessment

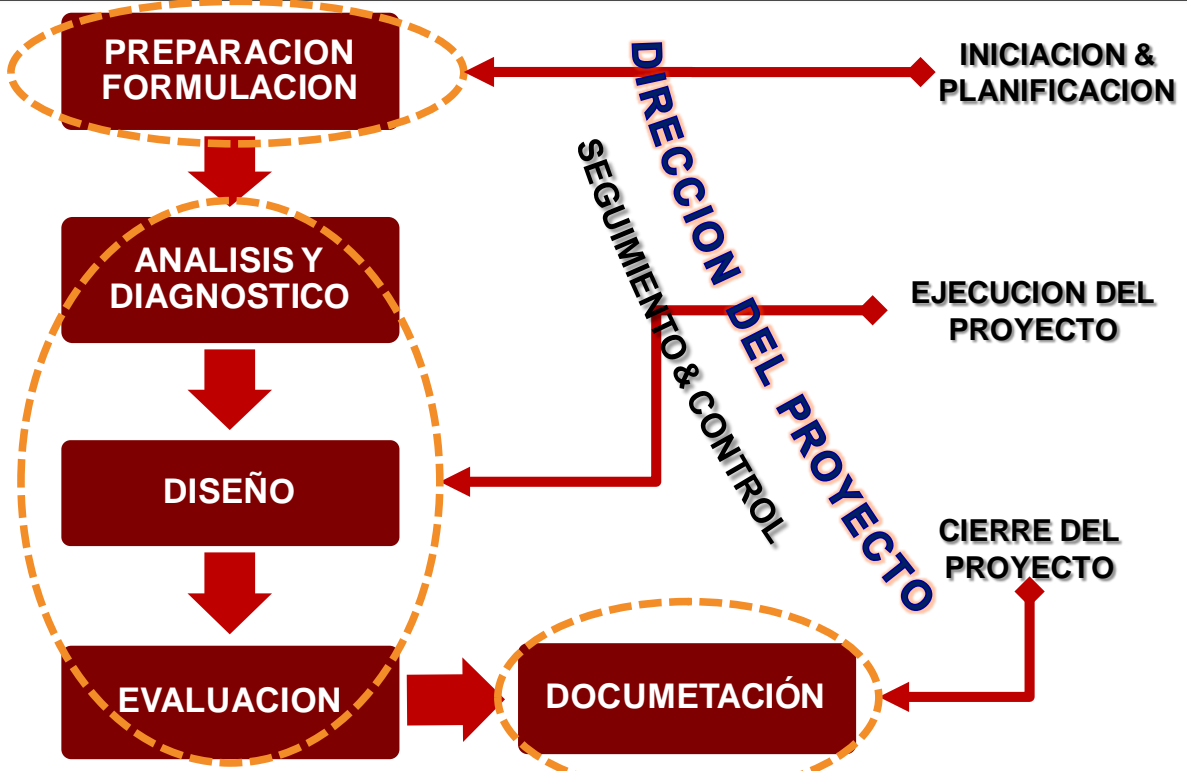
1.18 Comunication

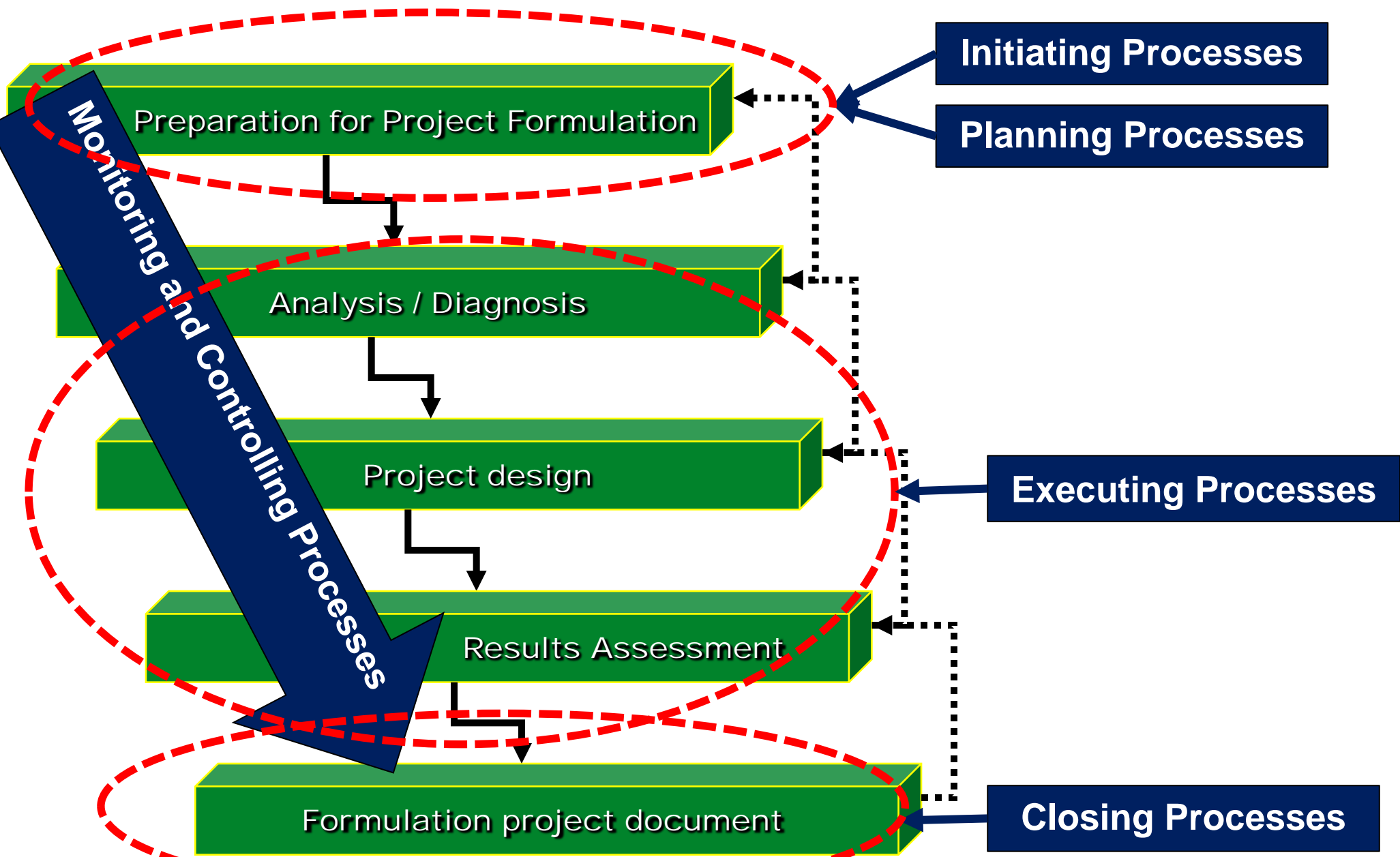
- In behavioral competences
 - Communication Management Plan



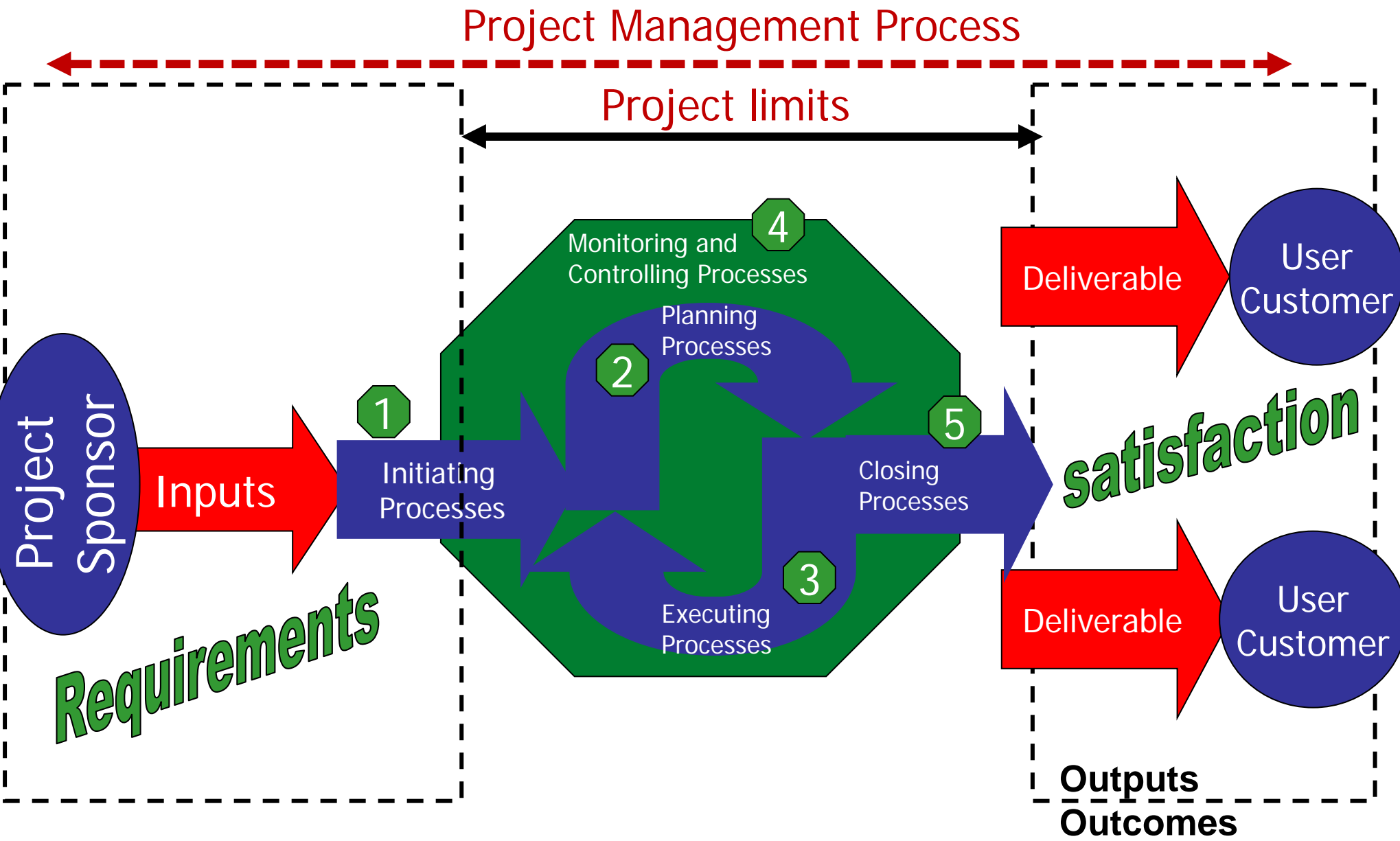
1.19 Start-up

Fases	Procesos
→ Preparation for Project Formulation	<ul style="list-style-type: none"> • Initiating Processes • Planning Processes
→ Analysis / Diagnosis → Project design → Multicriteria Assessment	<ul style="list-style-type: none"> • Executing Processes
→ Monitoring and Controlling	<ul style="list-style-type: none"> • Monitoring and Controlling Processes
→ Formulation project document	<ul style="list-style-type: none"> • Closing Processes





1.19 Start-up Project Charter (Terms of Reference)



1.19 Start-up

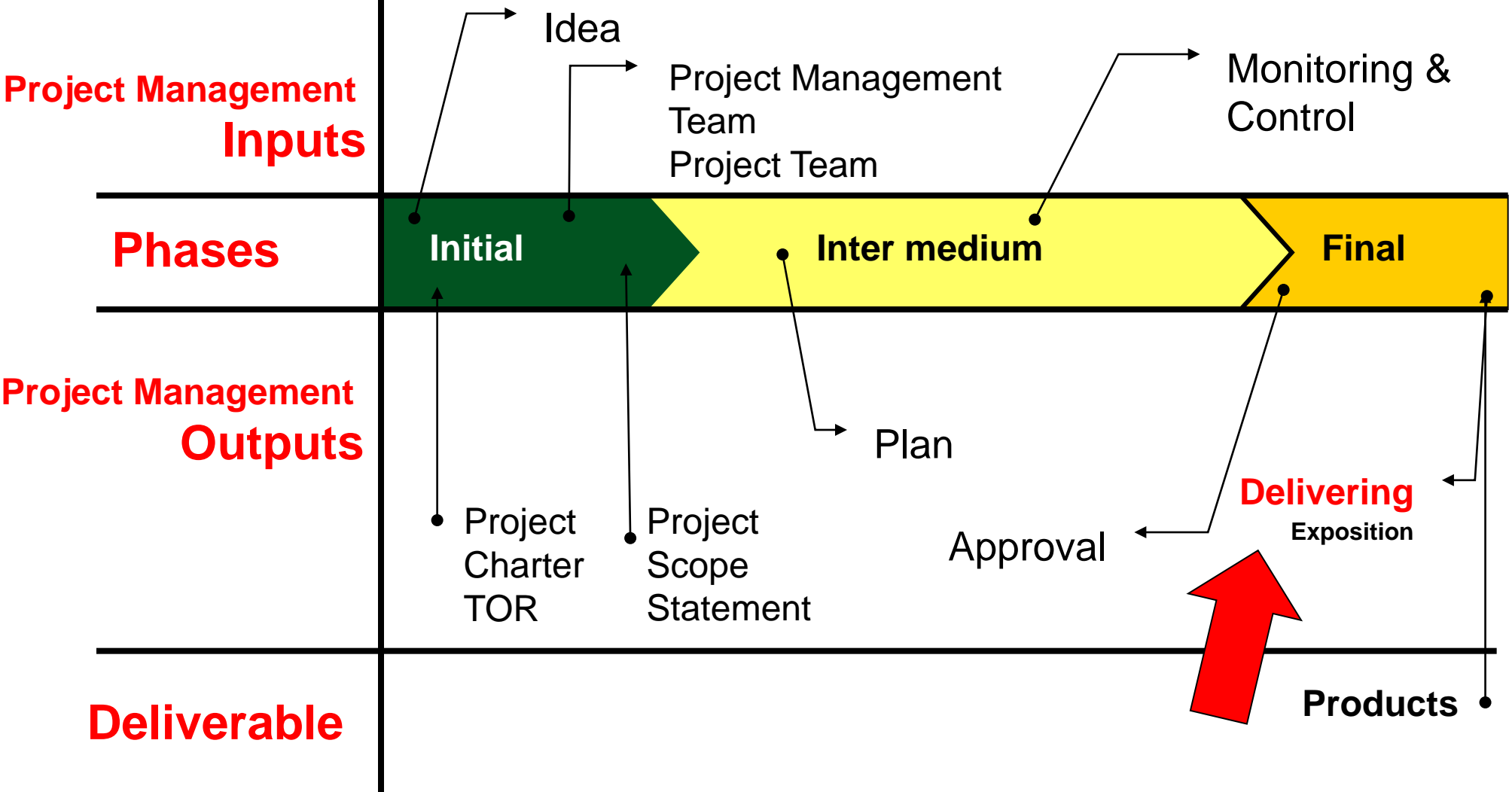
Preparation for Project Formulation

- The preparation for formulation phase, or the elaboration of a good project proposal, is divided into 3 sections:
 - **Formulation team composition and its required supports (financial, administrative and logistical).**
 - **Preparation of Terms of Reference (TOR)**
 - **Preparation of Working Plan for the execution of formulation activities**

1.20 Close-up

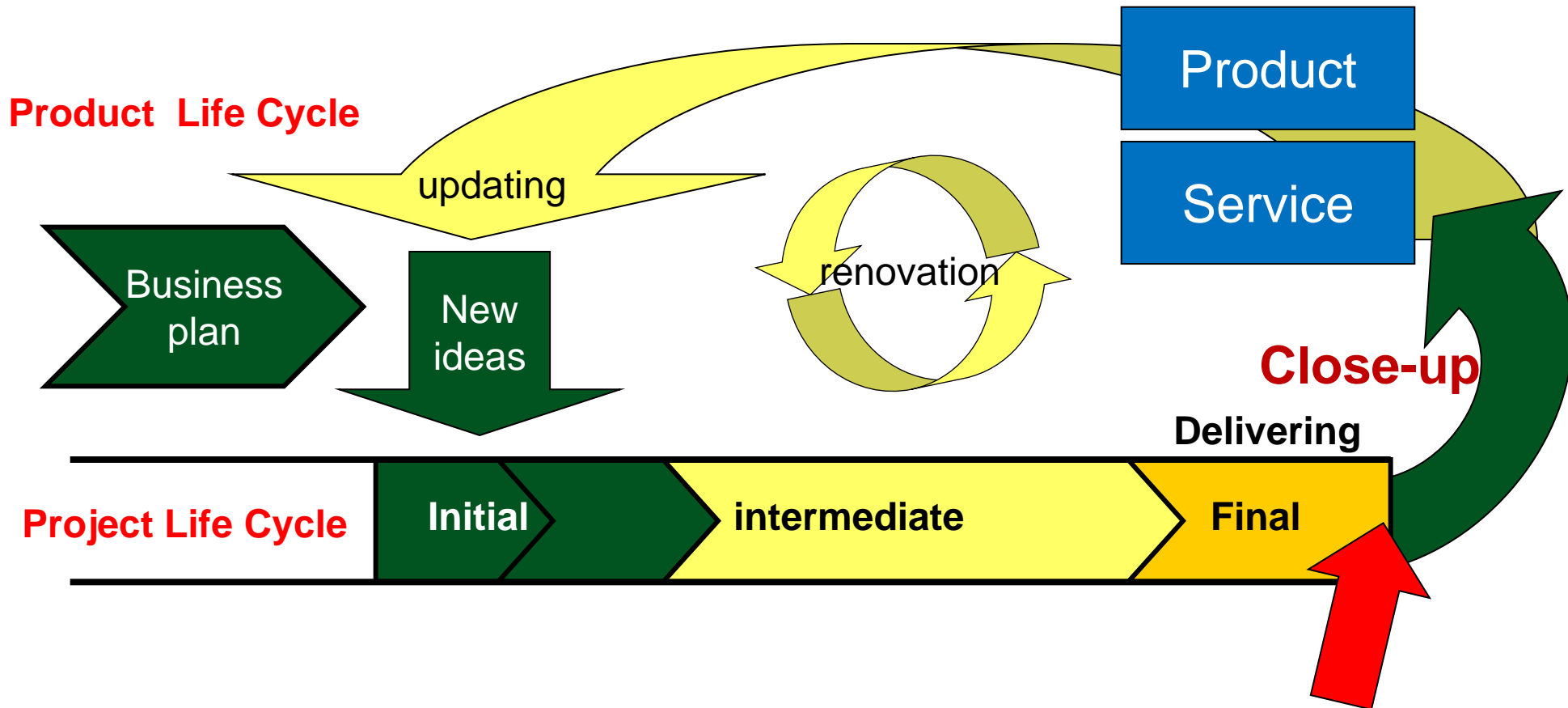
Project Life Cycle

Typical phases in a life cycle



1.20 Close-up

Project Life Cycle and Product Life Cycle: *Typical phase sequence in a life cycle*



CONCLUSIONS.

- All projects have a series of typical phases within a **life cycle**:
 - » Pre-investment
 - » Investment
 - » Exploitation
 - » Outcome assessment
 - As well as living beings, the project is born, grows, develops, is productive and dies.
 - “Project cycle”: is a model that explains and allows decision making in a systematic way
- Differentiate:
 - Project Life Cycle
 - Product Life cycle
- Differentiate:
 - **Project Life Cycle** phases from Project Formulation and Assessment phases

CONCLUSIONS

- A **project phase** is a period different from project sequence and is absolutely separate from other periods
 - It produces:
 - **Deliverables**
 - Decisions, basis of next phase
 - Each phase
 - Has sub-objectives
 - Requires **tools** and **tasks**
- **Social integration** is vital for a project success in all phases of project cycle
 - To achieve projects giving adequate response to proposed needs it is necessary to consider, from the first stages of project, social component and technical component as equally important .

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