

TEMPUS HANDBOOK

Objective oriented project design and management



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What is Tempus?

Tempus (the Trans European cooperation scheme for higher education) was adopted by the Council of Ministers of the European Union on 7 May 1990 and was since twice extended, with the current extension lasting until the year 2000.

Tempus is a European Union (EU) programme designed to stimulate cooperation with the Partner Countries in Central and Eastern Europe and the New Independent States and Mongolia in order to support the reform of their higher education systems.

Tempus forms part of the overall EU initiatives to support economic and social restructuring of central and eastern Europe (Phare programme) and to foster the development of harmonious and prosperous economic and political links between the European Union and the New Independent States and Mongolia (Tacis programme). In 1997 a total of 26 Partner Countries took part in Tempus. Funding is provided through Action Programmes, the individual amounts per country being the result of negotiations between the European Commission and the Partner Countries.

Tempus is a “bottom-up” programme responsive to the specific needs of individual institutions and Partner Countries. Projects are formulated by universities in the Partner Countries in cooperation with their partners from the European Union, where the EU universities supply their know-how and experience.

Tempus supports high quality projects aiming to restructure and develop curricula and teaching materials, upgrade teaching facilities, and/or improve university administration in higher education institutions in the Partner Countries. Tempus does this by providing financial grants for cooperation projects between higher education establishments in the EU and the Partner Countries in priority areas which are defined by the respective Partner Countries and the European Commission and which are in line with the overall socio-economic reform process of these countries.

Between 1990 and 1997 the EU has invested a total of 689 MECU in restructuring higher education in the Phare and Tacis partner countries by supporting more than 2,400 projects and approximately 12,000 individual mobility grants.

Introduction: The Purpose of this Handbook

Since 1990 more than 2,500 projects have been financed within the framework of the Tempus programme. Experience has shown that projects have major problems when essential factors for success are overlooked during project design and implementation. These factors may range from a lack of involvement of key stakeholders during initial project design, to the failure of a project monitoring system to provide the necessary management information during implementation. Therefore, the promotion of professional project management has been a major concern for Tempus.

The Logical Framework Approach was introduced into Tempus procedures in 1996, as a means of providing a framework for improved project design and management. This Handbook is intended to help you improve your project planning and management skills, and thus to assist in the smooth planning and implementation of Tempus projects. The handbook gives an introduction to the Logical Framework Approach and a guide to its use in the design and the implementation of Tempus projects. The handbook builds on the experience of two project management skills training workshops for project administrators in the Russian Federation, Ukraine, Belarus and Moldova, but has been substantially modified to include more information on the logical framework approach.

This is not a procedures manual and should not be used as such. The handbook presents model techniques and approaches which in practice will have to be modified to your own particular circumstances. Although it will not solve all of your problems today, it will provide you with more tools and techniques to help you do your work more effectively in the long term. After reading this handbook you will not be an expert in the use of the Logical Framework Approach (LFA) More reading, and ideally the participation in a LFA training course, may be required to take full advantage of the benefits offered by this tool for project design and management.

This handbook explains:

- *Objective-oriented project management and the Logical Framework Approach*
- *How to use the Logical Framework Approach for project design*
- *How to use the Logical Framework Approach for project implementation, monitoring and evaluation*
- *How to manage project financial resources*
- *How to develop and use activity schedules and cost schedules*
- *How to achieve good working relationships within a project team*
- *How to make oral and written communication more productive*
- *How to achieve effective meetings through good preparation and sound management*
- *How to improve your time management*

The handbook can be separated into two parts: Part I which explains how to use the LFA during project design and implementation; and Part II which provides some guidelines on everyday management skills. Although each chapter follows a logical sequence, they can be read selectively to provide you with the information you require to deal with a specific task or issue.

The glossary provides brief explanations of the terms used in the handbook. A section on useful references is provided to point you in the direction of additional sources of information on the Logical Framework Approach and on Tempus.

Part 1: Objective-Oriented Project Management and the Logical Framework Approach

The Logical Framework Approach (LFA or Logframe) was developed by USAID during the late 1960s in order to assist in the planning, management and evaluation of development activities. It has since been adopted as a planning and management tool by a large number of other agencies involved in providing development assistance, including ADB, DANIDA, GTZ, ILO, NORAD, ODA, SIDA, and UNIDO. The European Commission recently produced a manual on Project Cycle Management, based on the Logical Framework Approach. **Part I of this handbook provides a guide to the use of the LFA during project preparation and during implementation.** The approach adopted by Tacis to address weaknesses in project design and management is called Project Cycle Management. The Tacis Project Cycle Management Handbook describes this approach in detail and you may also want to refer to this to find out more about the logframe.

Chapter 1.1 gives a **brief overview of objective-oriented project planning**, and the logical framework approach, and outlines the strengths and weaknesses of the approach. It provides some definitions of the terminology used for the LFA in this handbook.

Chapter 1.2 provides **an introduction on how to use the Logical Framework Approach during project design**. It outlines eight steps involved in applying the Logical Framework Approach (LFA) to project design: i) conduct stakeholder analysis; ii) conduct problem analysis; iii) conduct analysis of objectives; iv) define the intervention logic; v) specify assumptions and risks; vi) specify indicators; vii) prepare an activity schedule; and viii) specify inputs. A Tempus project example is used in this chapter, and in chapter 1.3, to illustrate the approach.

Chapter 1.3 looks at **the use of LFA during project implementation**. It explains how to prepare a logframe for a project that has already been designed without one. It then describes the role of LFA in designing a project monitoring and evaluation system, provides guidelines on how to maintain project financial records and explains how the logframe is used as a basis for evaluation during and after project completion.

¹ *Project Cycle Management, Integrated Approach and Logical Framework*, European Commission, DG VIII 1993.

² Tacis Project Cycle Management Handbook, European Commission, DGIA

Chapter 1.1 The Role of the Logical Framework Approach

The dictionary definition of an *objective* is “something aimed at”. The purpose of setting objectives for a project is to define what you are aiming at (the desired future situation), in order that you can then work out a plan of action to achieve each objective. This process is called *objective-oriented planning*. When objectives are clear, it is possible to clarify the ultimate purpose of all activities in a programme, and to measure the performance of the project. During implementation, progress is monitored to determine whether the project is still on track towards achieving its objectives. If this is not the case, corrective action is taken to bring it back on track. This process is called *objective-oriented management*.

The LFA consists of an analysis phase and a planning phase:

Figure 1: The Logical Framework Approach to Project Design

ANALYSIS PHASE	PLANNING PHASE
<ul style="list-style-type: none"> ■ Step 1: CONDUCT STAKEHOLDER ANALYSIS - identify groups, people and institutions which are likely to be affected by the project, and identify the key problems, constraints and opportunities they face ■ Step 2: CONDUCT PROBLEM ANALYSIS - formulate problems; determine <i>cause and effect</i> relationships and develop a problem tree ■ Step 3: CONDUCT ANALYSIS OF OBJECTIVES - develop objectives from the identified problems; identify <i>means to end</i> relationships; identify clusters of objectives and determine the project strategy <p><i>Having analysed the situation, the project should now be ready for detailed planning.....</i></p>	<ul style="list-style-type: none"> ■ Step 4: DEFINE INTERVENTION LOGIC - define the project elements, test its internal logic, and formulate objectives in measurable terms ■ Step 5: SPECIFY ASSUMPTIONS AND RISKS - identify the conditions which are likely to affect the project's implementation but which are outside the project management control ■ Step 6: IDENTIFY INDICATORS - identify ways to measure that progress has been achieved; formulate indicators; define means of measurement ■ Step 7: PREPARE ACTIVITY SCHEDULE - determine the sequence and dependency of activities; estimate duration, set milestones and assign responsibility ■ Step 8: PREPARE COST SCHEDULE - specify inputs required; develop cost schedule; prepare detailed budget

In addition to its role during programme and project preparation, the LFA is also a key management tool during implementation and evaluation. It provides the basis for the preparation of action plans and the development of a monitoring system during implementation, as well as a framework for evaluation.

The main output of the LFA is the logframe matrix. This consists of a matrix with four rows and four columns, which summarises the project, records the assumptions which underlie the project's strategy, and outlines how the project may be monitored. Figure 2 summarises the matrix structure and contents.

Figure 2: The Logframe Matrix

NARRATIVE	INDICATORS OF ACHIEVEMENT	MEASUREMENT	ASSUMPTIONS & RISKS
Overall Objectives	Measures of achievement of Overall Objectives	Sources of information & methods used to verify achievements	
Specific Objectives	Measures of achievement of Specific Objectives	Sources of information & methods used to verify achievements	Assumptions affecting linkage between Specific & Overall Objectives
Outcomes	Measures of achievement of Outcomes	Sources of information & methods used to verify achievements	Assumptions affecting linkage between Outcomes & Specific Objectives
Activities	Inputs - human & physical resources required	Costs - of human & physical resources	Assumptions affecting linkage between Activities & Outcomes

In the narrative, the logframe sets out the intervention logic of the project (if activities are undertaken, then outcomes will be achieved, then specific objectives, etc.) and describes the important assumptions and risks which underlie this logic. This provides the basis for checking the feasibility of the project, ensuring that improbable assumptions or undue risks are carefully assessed.

For management and supervision of projects, the logframe defines the tasks to be undertaken, the resources required, and the responsibilities of management. In the second and third columns (indicators of achievement, and measurement), the logframe provides the framework against which progress will be monitored and evaluated.

Strengths of the LFA

By bringing stakeholders together to discuss problems, objectives and strategies, the LFA encourages people to consider what are their own expectations, and how these might be achieved. By stating objectives clearly and setting them out in a 'hierarchy of objectives', the logframe matrix then provides a means of checking the internal logic of the project plan, and ensures that activities, outcomes and objectives are linked. It forces planners to identify the critical assumptions and risks which may affect project success, thus encouraging a discussion about project feasibility. In stating indicators of achievement and means of measuring progress, planners are made to think about how they will monitor and evaluate the project right from the start. All of this key information is brought together in one document - the logframe - which provides a useful summary for those interested.

Weaknesses of the LFA

While the LFA has proven to be a useful planning and management tool, it is not a comprehensive tool for either planning or management and does not guarantee project success. The process is time-consuming and requires considerable training in the concepts and logic of the approach. Planners are required to summarise complex ideas and relationships into simple phrases which may be unclear or meaningless. All too often the caricature "fill-in-the-boxes" approach is used to complete the logframe matrix during project design, leading to a poorly prepared project with unclear objectives and a lack of ownership of the project among stakeholders.

Problems can then be compounded by rigid application of the logframe during implementation without taking into account changes in the project environment which may require redesign of the project. If unrealistic targets had been set during planning, this can be very demoralising to staff during implementation.

To be used effectively, the LFA must be supported by other tools for technical, economic, social and environmental analysis. Stakeholders should be involved as fully as possible which requires teamwork and strong facilitation skills on the part of project planners. To ensure that problem analysis reflects real priorities, effective participation must build on relationships which have already been established with stakeholders. During implementation, the logframe should be regularly reviewed and revised to reflect changes in the project environment.

Definitions

The LFA uses a very specific technical vocabulary, and it is important to understand what the commonly used terms mean. Furthermore, the LFA is used by many other donors, who apply their own personalised terminology. A brief description of the terminology is given below. Further detail can be found in the glossary:

Narrative	The strategy underlying the project. It is the narrative description of the project's intervention logic at each of the four levels of the 'hierarchy of objectives' used in the LFA.
Overall objective	"The goals the project will contribute to in the longer run" Higher level Objective of the wider sectoral or national programme, to which the project is designed to contribute.
Specific objective(s)	"What the project should achieve for its intended beneficiaries" The central objective of the project in terms of sustainable benefits to be delivered to the project beneficiaries. It should reflect the specific situation you want to achieve, and which contributes to the fulfilment of the Overall objective. It does not refer to the services provided by the project (these are outcomes), but to the utilisation of these services by project beneficiaries.
Outcomes	"What project management guarantees to deliver during the life of the project" The outputs produced by undertaking a series of activities and which are necessary to achieve the specific objective(s). The outcomes are what the project will have achieved by its completion date.
Activities	"The work to be carried out by project staff" The specific tasks necessary to transform inputs into planned outcomes.
Inputs	"What the project needs in order to complete its activities" The resources required in order to perform the activities (such as personnel, equipment, and materials).
Indicators of Achievement	"The level of performance which must be reached in order to achieve objectives" Measurable indicators that will show performance - whether or not objectives have been achieved at each level of the logframe hierarchy. Indicators provide the basis for designing an appropriate monitoring system.
Milestones	"How we will know whether we are on track towards achieving our objectives" A type of indicator for short term objectives which facilitate measurement of achievements throughout a project rather than just at the end. They also indicate times when decisions can be made.
Measurement	"The sources of information for recording indicators" The means by which the indicators or milestones will be recorded and made available to project management or those evaluating project performance.
Assumptions and Risks	"What may delay or prevent achievement of project objectives" External factors in the context which could affect the progress or success of the project, but over which the project manager has no direct control.
Pre-Conditions	"What is required for the project to start" Assumptions about the context or events Pre-conditions (if any) attached to the provision of aid which must be met before the project can commence.
Factors Ensuring Sustainability	"The factors likely to influence the flow of benefits after project completion" Factors which will determine whether project benefits continue after completion of the project.

Chapter 1.2 The Logical Framework Approach - a Step-by-Step Guide to Objective-Oriented Project Design

Projects are designed to address the problems faced by beneficiaries. A properly planned project addressing the real needs of the beneficiaries cannot be achieved without an analysis of the existing situation. It is quite common for problem analysis to be carried out with insufficient thoroughness, or even not at all. This is often because planners feel that they already know what the problem is, and do not want to waste their time and effort in doing 'pointless' research. However, the existing situation is likely to be perceived in different ways by different groups of stakeholders. One person or group of people rarely has a complete picture of the problems to be addressed by the project, so it is important to consult people with different perspectives. Thus it is important to bring together representatives of all key stakeholders in the Analysis Phase.

Step 1 - Conduct Stakeholder Analysis

The first task in the Analysis Phase is to determine who should be involved in the process. Stakeholders are people, groups or institutions with interests in a project. If stakeholders are affected positively by the project, then they can be termed beneficiaries. However, it is also possible for stakeholders to be negatively affected.

To determine who are the stakeholders the following questions may help you:

- What do you (the planners) need to know? Whose views and experience would be relevant?
- Who will be taking decisions about the project?
- Who will be expected to act on these decisions?
- Whose active support is essential to the success of the project?
- Who has a right to be involved?
- Who is likely to feel threatened by the project?

Once stakeholders have been identified, they should be consulted to determine what problems they face. This will involve the collection of information about the current situation, perhaps through a survey, a series of meetings, or some other form of assessment. Once sufficient information has been collected and processed, it is time to bring the stakeholders together in a workshop, to further develop the problem identification, and to begin the process of project design.

The purpose of stakeholder analysis is identify key stakeholders, assess their interest or 'stake' in the project, and the ways in which these interests affect the viability and riskiness of the project. It achieves this by identifying:

- the interests of stakeholders in relation to the problems to be addressed, and the main assumptions to be made about their involvement in the project
- conflicts of interest between stakeholders, which will affect the project's riskiness
- existing and potential relationships between stakeholders that can be built on to enhance the prospects for project success
- appropriate ways by which different stakeholders can participate in the project

Stakeholder analysis is best done during a brainstorming workshop involving all key stakeholders. The mandate of the workshop is to discuss the problems the stakeholders face in relation to the likely focus of the project - e.g. raising the profile of social work as a profession, and improving the availability of long and short-courses in social law and social work.

Figure 3 illustrates stakeholder analysis with a simple example. This table can then be used to draw out the assumptions and risks which may affect the project. The following checklist of questions may be useful:

- what roles or responses of the stakeholder must be assumed if the project is to be successful?
- are the roles or responses plausible and realistic?
- what negative responses by stakeholders might there be, and what might their impact be on the project?
- how probable are these negative responses, and do they represent major risks to the project?

Figure 3: An Example of Stakeholder Analysis

Stakeholder Group	What is their stake?	Requirements for their continued support of the project	Appropriate participation mechanism
Social workers	+ training & new skills + improved job prospects + improved work practices	<ul style="list-style-type: none"> ■ consultation in development of new curricula ■ non-discriminatory access to training 	<ul style="list-style-type: none"> ■ inform about project progress ■ involve in design of practical placement element of training ■ consult about training needs & priorities
Social work organisations	+ access to better qualified professionals	<ul style="list-style-type: none"> ■ consultation in development of new curricula ■ involvement in development of new work practices 	<ul style="list-style-type: none"> ■ inform about project progress ■ consult about training needs & priorities ■ involve in design of practical placement element of training
Partner Country University	+ involvement in project planning, implementation & decision-making + new curriculum adopted to new labour market requirements + increased funding - increased recurrent costs + /- involvement in future projects	<ul style="list-style-type: none"> ■ continued involvement in project planning, implementation & decision-making ■ support from partner country university hierarchy ■ good working relations with other project partners ■ staff training 	<ul style="list-style-type: none"> ■ partnership with EU university for planning & implementation ■ participation in day-to-day operations
EU partner universities	+ management of project + enlarge international cooperation + future research spin-off + /- involvement in future projects	<ul style="list-style-type: none"> ■ continued commitment & involvement of university hierarchy ■ good working relations with other project partners 	<ul style="list-style-type: none"> ■ partnership with partner country university for planning & implementation ■ manage day-to-day operations
Other higher education institutes in the partner country	+ inform about project implementation + access to project results	<ul style="list-style-type: none"> ■ mechanisms to ensure active involvement in dissemination of project results 	<ul style="list-style-type: none"> ■ inform about day-to-day operations ■ inform about dissemination opportunities ■ involve in curriculum development and design of teaching material
Ministry of Education	- increased recurrent costs - loss of control over university resources + public image + /- accreditation of new courses	<ul style="list-style-type: none"> ■ consultation in project planning & implementation ■ not to be threatened with loss of influence 	<ul style="list-style-type: none"> ■ consult for project planning & implementation ■ inform about day-to-day operations
Notes: + signifies a potential benefit - signifies a potential negative effect			

The results of such discussions with stakeholders should be used during objective setting, and for the identification of assumptions and risks. Both of these tasks are dealt with subsequently.

Institutional Appraisal

A major factor for the success of a project is the performance and capacity of the participating institutions. In order to analyse the stake each participating institution has in the project an institutional appraisal may be undertaken. SWOT analysis is a tool for institutional appraisal, and analyses the organisation under each of the four headings:

- **S**trengths - the positive internal attributes of the organisation
- **W**eaknesses - the negative internal attributes of the organisation
- **O**pportunities - external factors which could improve the organisation's prospects
- **T**hreats - external factors which could undermine the organisation's prospects

A SWOT analysis is undertaken as a brainstorming exercise in which representatives of the organisation participate fully. As with any brainstorming, one person should act as moderator, to explain the exercise, take suggestions from the group, write them down and summarise the findings.

The results are best displayed on a whiteboard or flipchart divided into a grid of four squares, to represent the S-W-O-T headings. The group should not be too large for discussion, and the members should be given time to think through their own contributions, either individually or in small groups of two or three people. If there is a good reason to consult widely throughout the organisation, it may be appropriate to conduct more than one SWOT, with groups representing different stakeholders. An example of a SWOT analysis for a Tempus partner university might look like the following:

<p>STRENGTHS</p> <ul style="list-style-type: none"> ■ Good contacts with professional organisations ■ Well-located ■ Well-qualified and motivated staff ■ Merit-based procedures for appointing lecturers 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> ■ Outdated curriculum ■ Shortage of text books and teaching materials ■ Inflexible administrative system ■ Inadequate employment services to assist students in finding jobs
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> ■ Cooperation with donor-funded programmes (Tempus, Know-How, etc.) ■ Stable political environment ■ Well-established relationships with potential partner universities 	<p>THREATS</p> <ul style="list-style-type: none"> ■ Low salaries ■ Poor telecommunications ■ Rapidly changing social and economic environment

Step 2 - Problem Analysis

In aiming at a desired future situation (the objective), there is an implicit recognition of an undesirable situation in the present - or to put it more simply, there is a problem. The first step in setting objectives is therefore to clarify what the problem is. This is called problem analysis and involves two tasks:

1. Identification of the major problems faced by beneficiaries; and
2. Development of a problem tree to establish causes and effects.

Problem analysis is an important part of the stakeholder workshop. It involves analysis of the problems already identified, from the perspectives of the various groups of stakeholders involved. In this way a balanced analysis is achieved which takes account of differing, and sometimes conflicting, points of view. The aim is to establish an overview of the situation by linking the problems together in a problem tree.

During problem analysis, the task is to identify the causal relationships between the various problems through the development of a problem tree. A problem tree is simply the problems set out in a hierarchical order.

From the previously formulated problems, each participant writes down a suggestion for a focal problem - ie. the problem that they consider to be the central point of the overall problem situation. Each stakeholder will be guided in their initial choice of focal problem by their own interest in the project, and the problems they are experiencing. The range of focal problems suggested should be discussed until the participants can agree on one focal problem. This is the starting point for the problem tree.

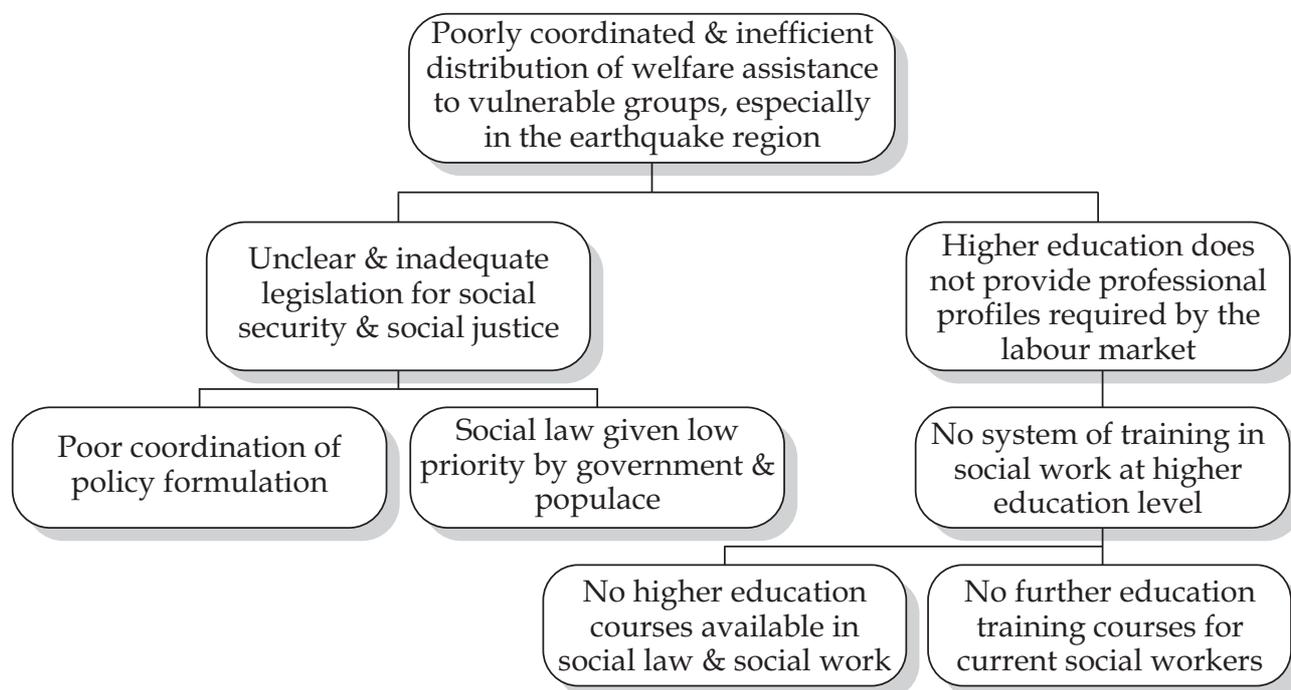
The focal problem is pasted onto a wall, and a second problem related to it. Then:

- if the problem is a cause it goes on the level below
- if it is an effect it goes above
- if it is neither a cause nor an effect it goes on the same level

As the tree develops, the remaining problems are attached to it in the same way. A review of the problem analysis may lead to the emergence of a different focal problem at a later stage, but this does not affect the validity of the analysis.

For example, if the focal problem is *"Inadequate number of qualified professionals employed in social law and social work"*, a cause might be *"No higher education courses available in social law and social work"*, while an effect might be *"Understaffed and inefficient government and non-government social work institutions"*.

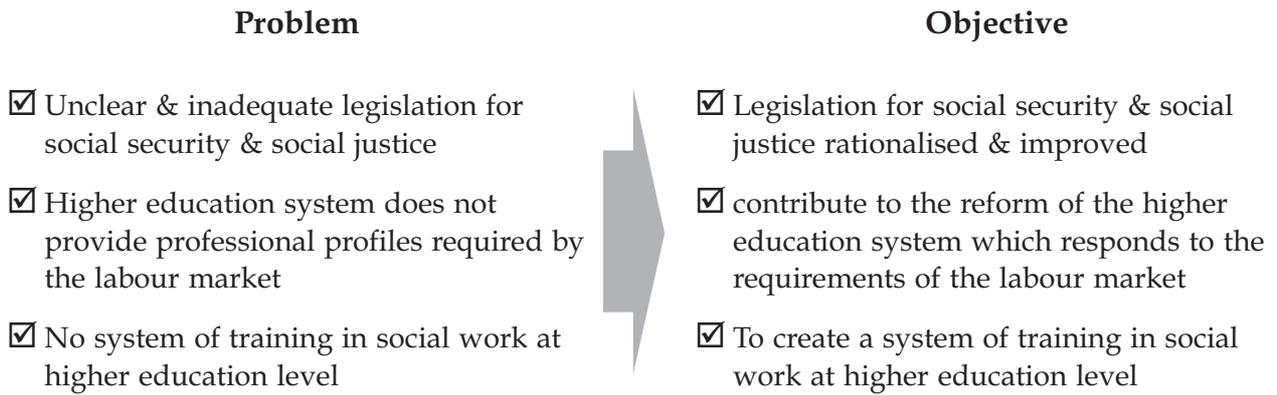
Figure 4: A Problem Tree



Step 3 - Conduct Analysis of Objectives

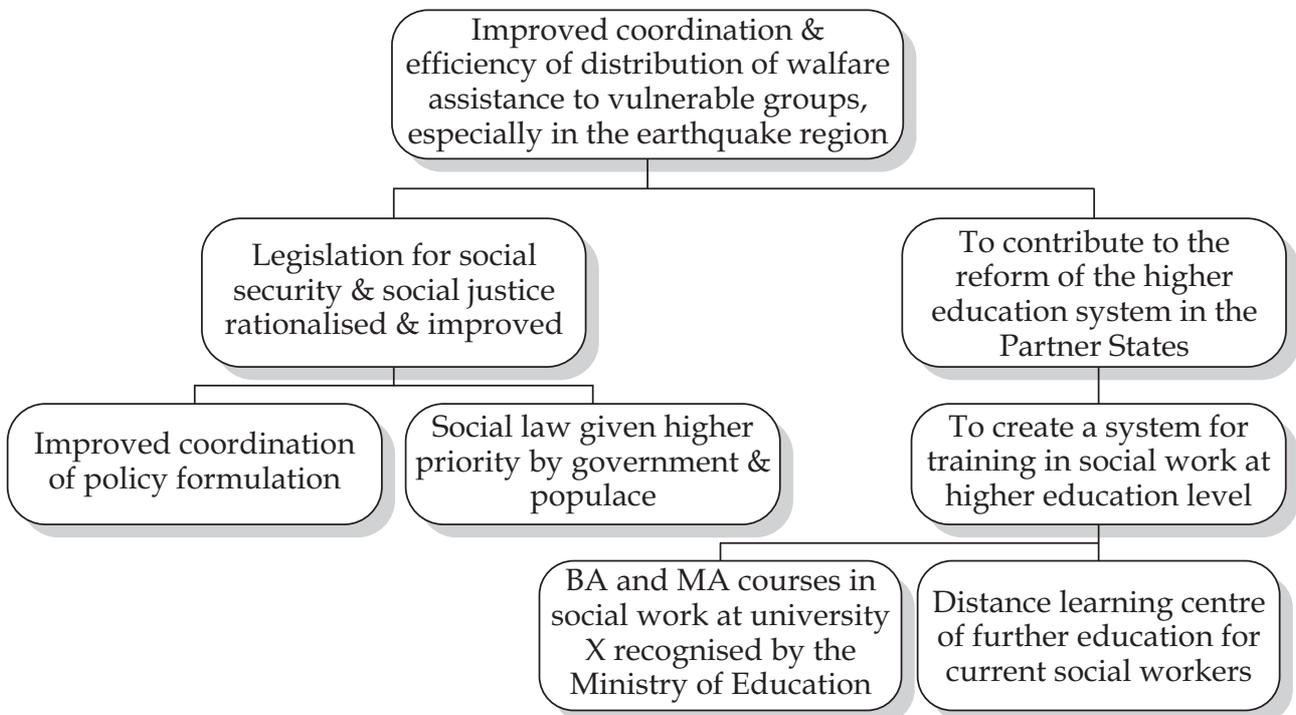
While problem analysis presents the negative aspects of the existing situation, analysis of objectives presents the positive aspects of a desired future situation. This involves the reformulation of problems into objectives - the objective tree can therefore be conceptualised as the positive mirror image of the problem tree.

Figure 5: Transforming Problems into Objectives



The focal problem is reformulated as the specific objective, and the ‘cause and effect’ relationships become ‘means to end’ relationships. However, it may be found that there are gaps in the logic of the initial objective tree, or that the objectives should in fact be at a different level in the hierarchy. Therefore linkages between objectives should be reviewed and reorganised as necessary. Objectives dealing with a similar topic are grouped together in clusters to identify definable areas of management responsibility.

Figure 6: An Objective Tree



At this stage, statements of objectives will still be fairly broad. It is only when the scope of the project is decided, and preparation of the detailed plan begins, that these statements will be reviewed and clarified.

Stating Objectives

Project objectives will already have been specified during the analysis of objectives. Now that they have been transposed in to the logframe, they should be reviewed to ensure that they are clearly stated and understood by all parties. Objectives should also have certain characteristics. They should be:

- ☑ **Realistic** - achievable within the given financial and physical resources, and the time-frame envisaged
- ☑ **Specific** - so that any progress towards the objective can be attributed to the project and not to some other cause
- ☑ **Measurable** - at acceptable cost and with acceptable effort, so that the project's performance can be measured

Management Tip 1: Stating Objectives

Objectives should: be stated using **strong verbs** in their infinitive form (**to do** something); specify the **nature** of the change to be achieved by the project (the target group); and, provide **measurable indicators** which will inform planners within Tacis and the partner countries of the extent to which Indicative Programme goals and objectives have been achieved.

Examples of weak, poorly specified objectives:

To speed up the preparation of the tools, the relationships, the identification of needs, the priorities and the structures to be ready to participate fully in the Leonardo Programme

Examples of strong, measurable objectives:

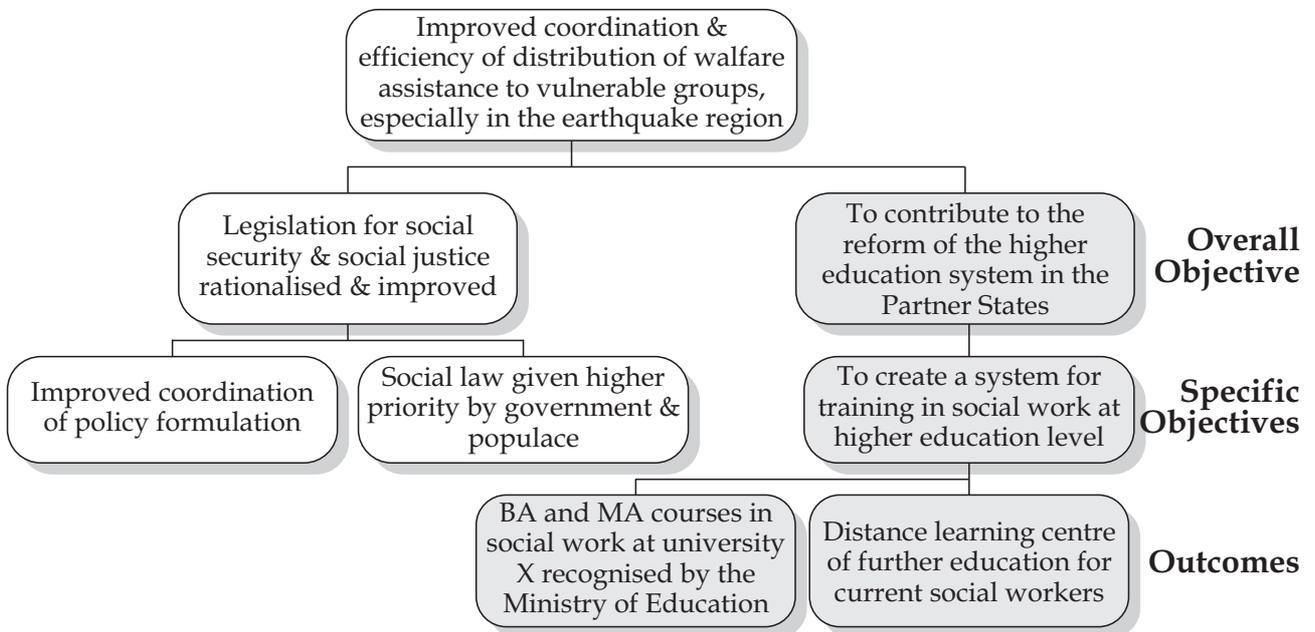
To provide support to the vocational education sector in order to:

- *increase initiative, flexibility and broaden the background of labour market entrants by redesigning initial training content with more generalised curricula*
- *develop closer links between initial trainees and employers*
- *promote efficiency of training provision by developing new training materials, applying modern assessment and certification procedures; and*
- *invigorate school management and upgrade in-service teacher training*

Clustering Objectives

The objective tree represents a mirror image of the overall problem situation. However, it is unlikely that a particular project can ever address all of the problems in a situation, and therefore the tree is likely to contain far more objectives than will be included in the project. The final part of analysis of objectives involves the selection of a strategy or number of strategies which will be included in the project, and what will remain outside its scope. A 'strategy' comprises clusters of closely related objectives. Strategy analysis decides which of these clusters should be included in the project, and it looks at the feasibility of each. This may mean that during strategy analysis the focus of the project shifts. It is only when the strategy(ies) have been selected that the specific objectives and overall objectives are finalised.

Figure 7: Strategy Selection



Depending on the scope and amount of work entailed, the selected clusters or strategy may form a 'project-sized' intervention, or a programme consisting of a number of projects.

Step 4 - Define Intervention Logic

The intervention logic of a project is the narrative description of the project at the four levels of the 'hierarchy of objectives' - activities, outcomes, specific objectives and overall objectives. Defining the intervention logic is the first stage in preparation of the logframe, and it is worth providing an introduction of the whole logframe before going further.

The logframe is the visual output of the LFA. However, the logframe for all its advantages when clearly understood and professionally applied, provides no magic solution to identifying or designing good projects. It is merely an analytical, design and presentational tool. The principle of 'garbage in, garbage out' can apply to the logframe if it is used mechanistically. When used properly the logframe helps to make the logical relationships between activities, outcomes, specific objectives and overall objective(s) more transparent, at least to the informed user. The logframe should thus not be seen as simply a set of mechanistic procedures, but as an aid to thinking:

*"The method consists of an analytical process and a way of presenting the results of this process, which makes it possible to set out systematically and logically the project's objectives and the causal relationships between them."*³

Another important point is that the logframe must be seen as a dynamic tool, which should be re-assessed and revised as the project itself develops and circumstances change. It should be used to provide structure and purpose to project planning and budgeting without being perceived as an inflexible and constraining blueprint.

The Structure of the Logframe

The Logframe itself consists of a matrix, which has four columns and four rows. The **vertical logic** identifies what the project intends to do, clarifies the causal relationships and specifies the important assumptions and uncertainties beyond the project manager's control. The **horizontal logic** relates to the measurement of the effects of, and resources used by, the project through the specification of key indicators for performance measurement, and the means by which the measurement will be verified. The conceptual model is presented in figure 8.

The column headings in figure 4 are defined as follows:

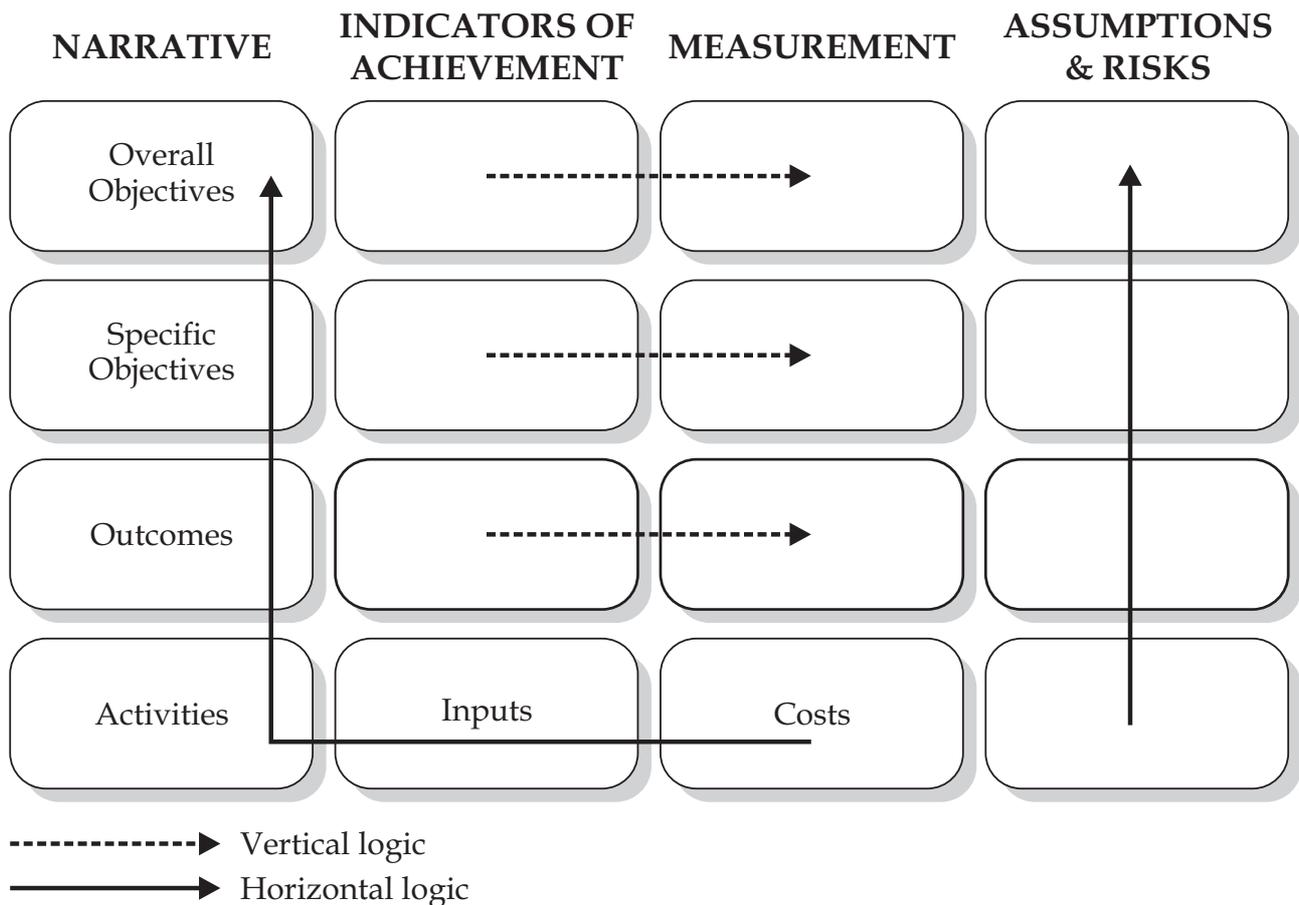
1. **Narrative** - the narrative description of the project's intervention logic at each of the four levels of overall objectives, specific objectives, outcomes and activities
2. **Indicators** - measurable indicators at each level of the logframe narrative
3. **Measurement** - the means by which the indicators will be recorded.
4. **Assumptions** - risks and constraints which could affect the progress or success of the project.

For detailed definitions of the vocabulary used in LFA please refer to chapter 2.2. and the Glossary of Terms.

³ G. Coleman "Logical framework approach to the monitoring and evaluation of agricultural and rural development projects", Project Appraisal December 1989

Most of the donor agencies (including the European Commission and the World Bank) have now adopted the logframe as a planning and management tool. Unfortunately, the different donors use different terminology for the row and column headings of the logframe matrix. For example, outcomes are sometimes described as outputs or results, while the specific objectives are referred to as the project purpose, project development objective or immediate objective. This should not discourage you, as the basic structure and approach are common to all donor agencies.

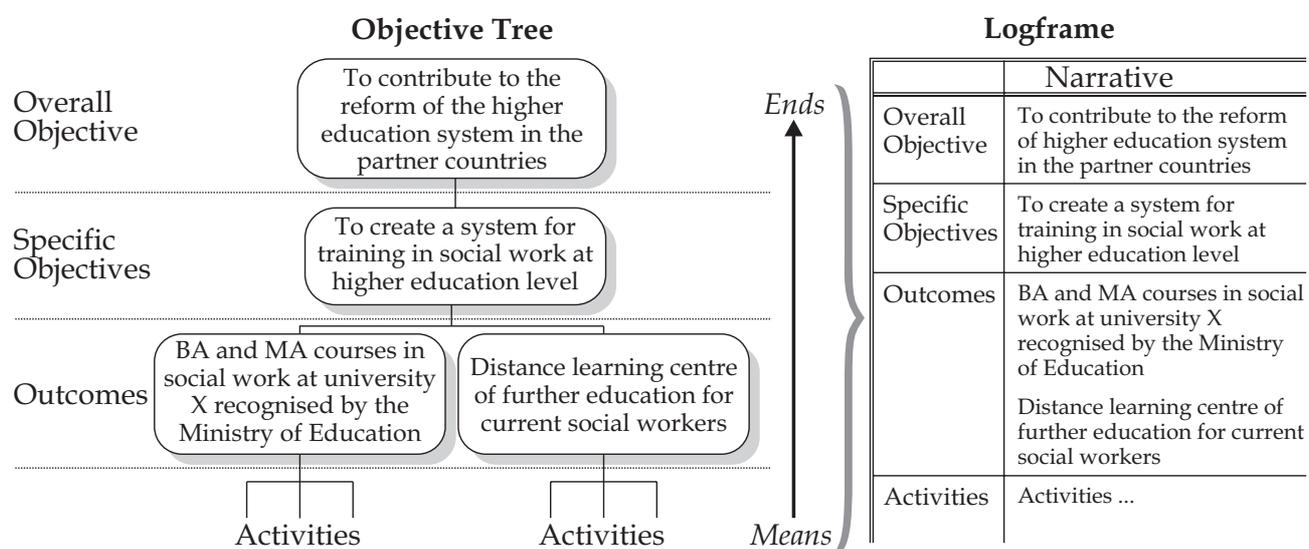
Figure 8: The Logframe Matrix



Approach to Completing the Logframe

It is usually best to start preparing the logframe by working vertically down the first column (Narrative) until this is complete. Once the hierarchy of overall objective(s), specific objectives, outcomes, activities and inputs is considered sound, the planner should then start to complete the Assumptions. This helps test the soundness of the project description and should identify the constraints faced by the project, and any risks beyond the project's control. The second and third columns should then be completed, working across the matrix for each level of the project hierarchy. Thus for each Indicator, the Measurement should be specified to help test if the indicator is in fact measurable in a timely and cost effective manner.

Figure 9: Transposing Objectives into the Logframe



A common problem in transposing objectives from an objective tree into a logframe, is clarifying the difference between *objectives*, *outcomes* and *activities*. The logframe matrix is a management tool, and it is 'manageability' which defines the difference between objectives, outcomes and activities. Manageability is closely linked to the assumptions and risks incorporated into the project's design.

In simple terms the project manager:

- has authority over inputs
- is responsible for their efficient use during the conduct of activities
- will be held accountable for the achievement of outcomes

Specific objectives require a response from clients or beneficiaries (e.g. utilisation of the service provided by the project), and therefore the manager cannot be held directly responsible. Nonetheless, the specific objectives should be set at a realistic and manageable level and it is the managers responsibility to monitor the extent to which outcomes are leading to achievement of specific objectives, and to take corrective action as necessary. In fact, it is this linkage - from outcomes to specific objectives - which is critical to the success of a project. Overall objectives describe the intended wider impact of the project, and while they lie further outside management control they should still be set at a realistic and measurable level. Text box 1 illustrates this issue.

Text Box 1: Manageability and the Logframe

Taking the example of a project to create a system for training in social work at higher education level, the sequence between the activity of preparing new curricula, and the goal of contributing to the reform of the higher education sector in the partner country (in social work), is lengthy and complex.

Activity	<ul style="list-style-type: none">■ University prepares new curricula for BA and MA courses in social work and short further education courses■ University runs new degree courses in social work■ University runs short further education courses for practitioners in social work■ New courses reflect the requirements of social welfare organisations■ Many students follow BA and MA programmes■ Social workers agree training courses provide the necessary skills■ Social welfare organisations find new skills useful■ University teachers attend retraining study visits in the EU■ University teachers gain new knowledge■ University teachers change attitude■ University teachers gain new skills■ University teachers use their skills to further update the curriculum and develop new teaching material
Objective	<ul style="list-style-type: none">■ A system for training in social work at higher education level is created

At which level should activities, outcomes, specific objectives and overall objectives be set? In fact, the sequence of activities-outcomes-specific objectives-overall objectives is a continuum over which the project's control gradually diminishes. With each successive step the desired response by the client (the social work teachers and current social workers) becomes less under the control of the project manager, and more subject to external factors or risks. To claim that a manager could be held accountable only for the activities of preparing new curricula and running training courses in order to achieve the outcome of x number of social workers trained is unsatisfactory because the achievement of x trained social workers is far from the objective of creating a system for training in social work at higher education level . On the other hand, to require that the manager be held accountable for the efficient operations of social work institutions is not reasonable as he or she has no direct influence over these institutions.

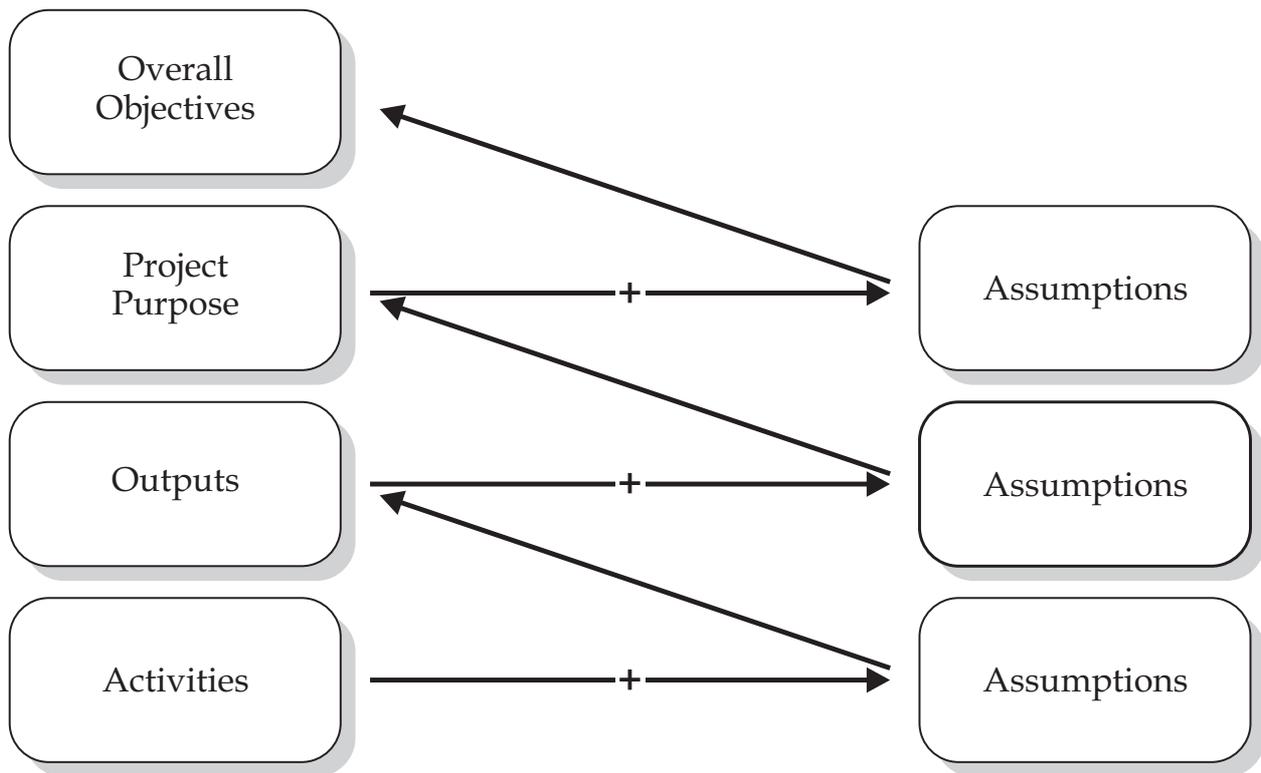
Decisions about what constitute sufficiently complex activities, valued outcomes and feasible objectives should be based on two criteria - the capabilities of the manager and the management team; and the riskiness of the project environment. Thus:

- Activities in a logframe should be set at a level of complexity which encourages managers to focus on strategic rather than tactical aspects of management. Thus activities are not merely the provision of inputs (eg. stationery purchased) as this fills the logframe with unnecessary and distracting detail. Tactical issues can be dealt with using other techniques such as activity and cost schedules (see Steps 7 and 8).
- Outcomes should be specified as valued outputs resulting from activities. If the activity is 'conduct short courses' it is not sufficient to specify the outcome as 'short courses conducted' or '75 students trained'. A more valued outcome of the short courses would be that participants gain new knowledge. The manager will be held accountable for their achievement, and so targets should be set within a realistic timeframe - if progress is not visible within a relatively short period (one year or less) then the manager will be unaccountable for long periods.
- Specific and Overall Objectives link implementation (what the project does) to its aims (what the project seeks to achieve). Although these two levels lie outside direct management control, they should be specified at a level which allows the assumptions and risks to be monitored effectively. If the objectives were set at too high a level, the assumptions and risks affecting their achievement would become so numerous that monitoring them would distract the management team from actual implementation.

From the above example it might be feasible to suggest that the main activities of the project are to prepare and deliver new courses, that the expected outcome is that BA and MA courses are developed and recognised by the Ministry of Education, that the specific objective is that a system for training in social work at higher education level is created which leads to the project's overall objective of contributing to the reform of the higher education system in the partner countries.

Step 5 - Specify Assumptions and Risks

No matter how well a project is planned and prepared, things will not all go according to plan. A number of external factors are likely to affect the project's implementation and long-term sustainability but will lie outside its control. These conditions must be met if the project is to succeed, and are included as assumptions in the fourth column of the Logframe. Figure 10 illustrates the importance of assumptions - only if the objective and the assumption are achieved can the project move to the next level.

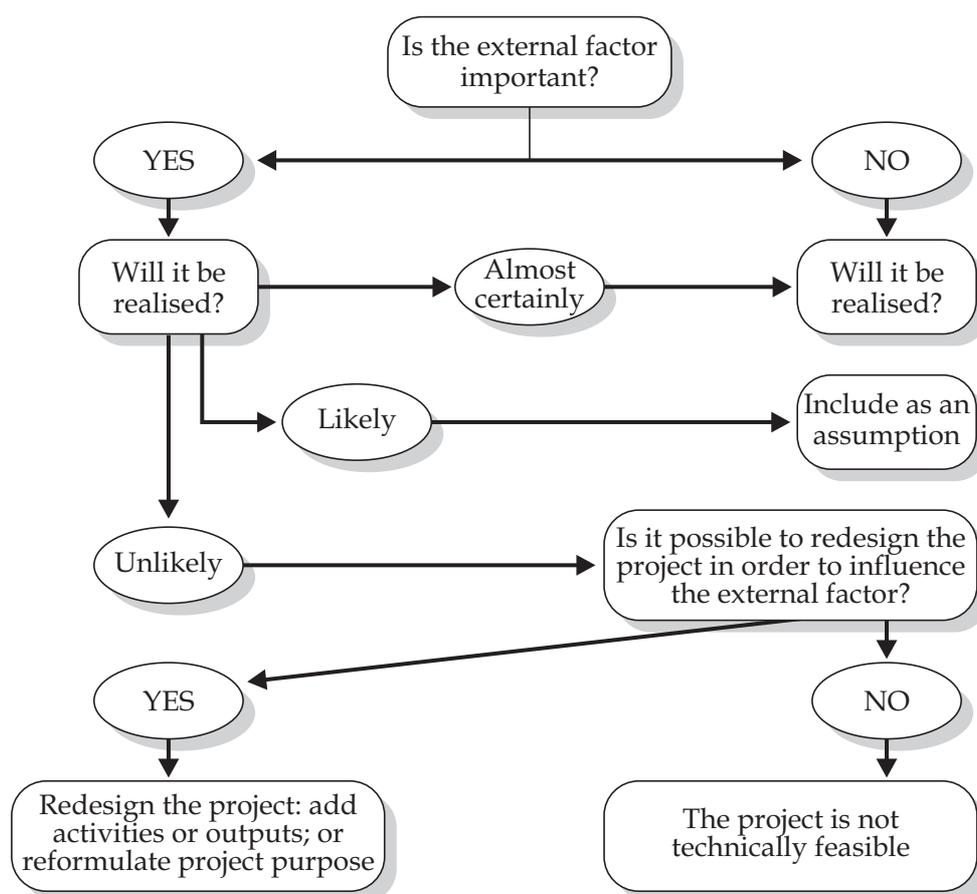
Figure 10: The Role of Assumptions

One of the project designer's roles is to identify these external factors, and as much as possible to build mechanisms into the project's design either to deal with them, or to monitor the effect they are having. Therefore the probability and significance of these conditions being met should be estimated as part of assessing the riskiness of the project. Some will be critical to project success, and others of marginal importance. A useful way of assessing the importance of assumptions is through the use of the algorithm in Figure 11. Once assumptions have been identified, they are stated in terms of the desired situation. In this way they can be verified and assessed.

Examples of assumptions may be:

- Local institutions collaborate in planning activities
- Suitable staff are identified and recruited - local and expatriate
- Trainees return to work on the project
- Adequate budget allocations are made
- Government meets certain pre-conditions set out by the donor

Figure 11: The Assumptions Algorithm



Step 6 - Identify Indicators

Simply stating an objective is not sufficient. It is important to establish ways of measuring the progress that is being achieved. To ensure that an objective is measurable it must be accompanied by indicators which specify the information required. At the same time, the means of measurement of the indicators should also be specified.

Formulate Indicators

Indicators should also fulfil certain criteria - Quantity, Quality and Time (often known as QQT). There are four steps involved in the selection of indicators:

- **Define the indicator:** e.g. educational status improved
- **Set quality:** e.g. number of graduates completing degree courses increased
- **Set quantity:** e.g. number of graduates completing degree courses increased from 500 to 1000
- **Set time:** e.g. number of graduates completing degree courses increased from 500 to 1000 by the year 1999

Care must be taken to ensure that the indicators selected are specific to the objectives - in other words, they really will show whether the objective is being achieved or not. Often though, different people have their own interpretation of what a project is trying to do. When the planners and the people implementing the project differ in their interpretation of objectives, the result can be very damaging to project performance. Selection of indicators is a helpful exercise in clarifying precisely what is meant by an objective, and in ensuring that the objective is realistic, specific and measurable. This is illustrated in figure 12:

Figure 12: The Role of Indicators

Formulate objective:	To help several players to address the issues of qualifications and training, and to implement actions to overhaul and develop their systems successfully by drawing on the know-how and technical assistance of their counterparts in the countries of the EU
Discussion:	Which players will be involved? What kind of actions are anticipated? What kind of systems are required? What kind of relationships are envisaged with counterparts?
Indicators selected:	<ul style="list-style-type: none"> ■ no. and type of higher education institutions participating in project ■ no. of graduates trained ■ rating of projects by external monitor ■ no. of active and unemployed social workers retrained ■ % graduates and retrained social workers finding new employment
Reformulate objective:	To develop partnerships between higher education institutions in the Partner Countries and EU countries in order to develop innovative approaches to the training of graduates and retraining and redeployment of active and unemployed social workers.

Measurement

When indicators are formulated, the source of information and means of collection should be specified. This will help to test whether or not the indicator can be realistically measured at the expense of a reasonable amount of time, money and effort. The Measurement column should specify:

- the **format** in which the information should be made available (e.g. progress reports, project accounts, project records, official statistics etc.)
- **who** should provide the information
- **how regularly** it should be provided (e.g. monthly, quarterly, annually etc.).

Sources outside the project should be assessed for accessibility, reliability and relevance. The work and costs of collecting information to be produced by the project itself should also be assessed, and adequate means provided. Indicators for which one cannot identify suitable means of measurement should be replaced by other indicators. If an indicator is found to be too expensive or complicated to collect, it should be replaced by a simpler, cheaper indicator.

Means and Costs

Means are the human, material and financial resources required to undertake the planned activities and manage the project. In order to provide an accurate estimate of the means and costs required for a project, planned activities and management support activities must be specified in sufficient detail. An area for particular attention is the cost of collecting data on indicators. Specification of Means and Costs is covered in more detail under step 8 - specifying inputs.

Step 7 - Prepare Activity Schedule

After the logframe matrix has been completed, further planning can take place to add operational detail to the plan. An activity schedule is a method of presenting the activities of a project which identifies their logical sequence and any dependencies that exist between activities. It is also used as a means of identifying who will be responsible for implementing an activity. The most commonly used presentation tool is the Gantt chart, but Critical Path Analysis is also sometimes used. Once the logframe itself is complete, it is then possible to copy the activities from the left hand column into an activity scheduling format. This is most easily done if the matrix has been prepared on a computer spreadsheet.

A Checklist for Preparing an Activity Schedule

The steps involved in activity schedule preparation are:

1. List the main activities
2. Break the main activities down into manageable tasks
3. Clarify the sequence and dependencies of the activities and tasks
4. Estimate the start-up, duration and completion of each activity and task
5. Identify process indicators or milestones by which you can measure project performance
6. Define the expertise required to undertake the activities and tasks
7. Allocate tasks among the project team

List Main Activities

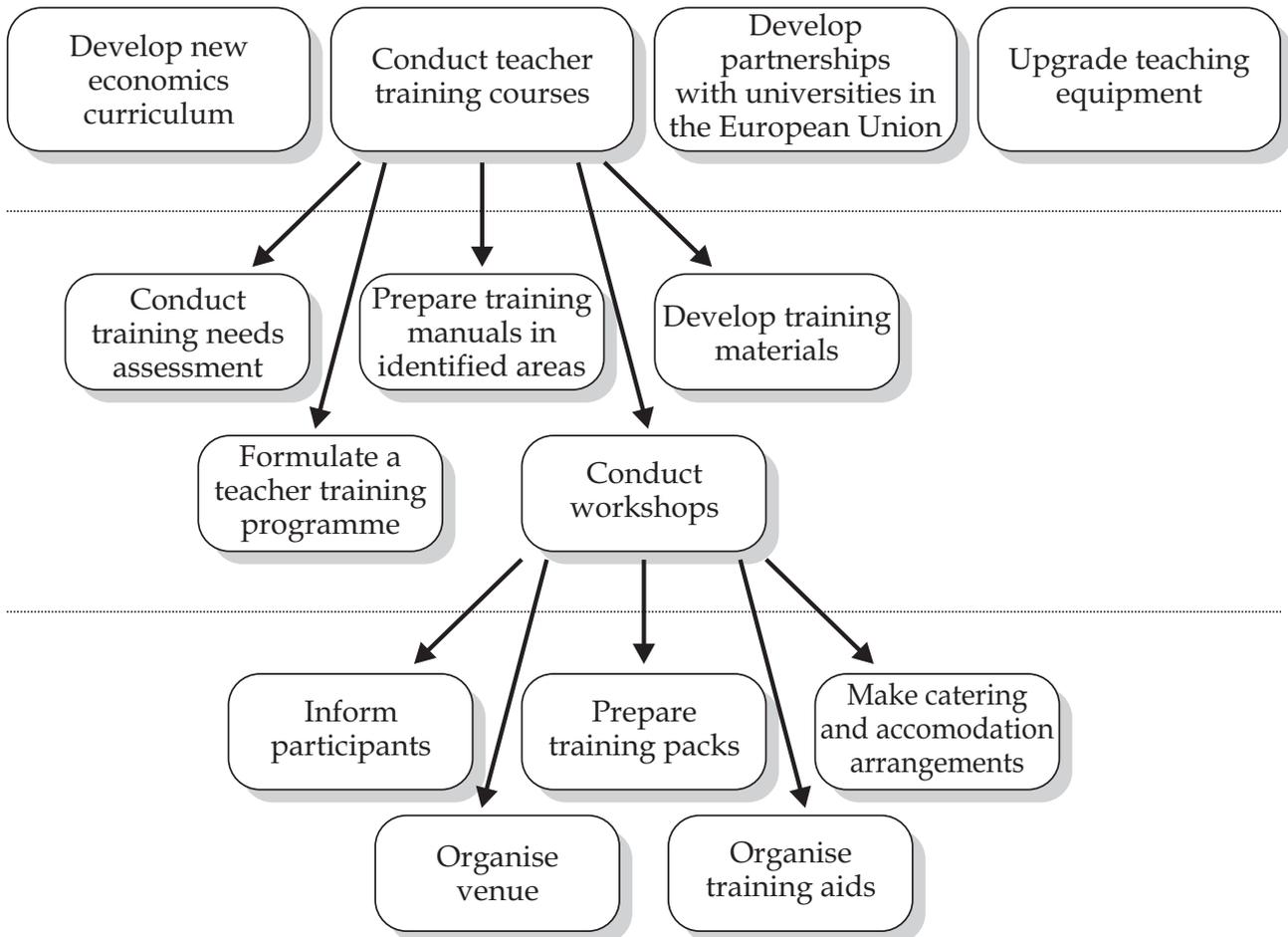
The main activities are a summary of what the project must do in order to achieve project objectives. While preparing the list, planners should always be aware of the following:

- available human, physical and financial resources
- how each activity will lead towards achievement of project outcomes, and the assumptions which underpin this
- the risks and uncertainties that could affect implementation of activities
- the time-frame of the project

Work Breakdown Structure

The purpose of breaking activities down into sub-activities or tasks, is to make them sufficiently simple to be organised and managed easily. The technique is to break an activity down into its component sub-activities, and then to take each sub-activity and break it down into its component tasks. Each task can then be assigned to an individual, and becomes their short-term goal. An example is shown in figure 13.

Figure 13: Developing a Work Breakdown Structure



The main skill is in getting the level of detail right. The most common mistake is to break the activities down into too much detail. The breakdown should stop as soon as the planner has sufficient detail to estimate the time and resources required, and the person responsible for actually doing the work has sufficient instructions on what has to be done.

Sequence

Once the activities have been broken down into sufficient detail, they must be related to each other to determine their:

- **sequence** - in what order should related activities be undertaken?
- **dependencies** - is the activity dependent on the start-up or completion of any other activity?

This can best be described with an example. Building a house consists of a number of separate, but inter-related activities: digging and laying the foundations; building the walls; installing the doors and windows; plastering the walls; constructing the roof; installing the plumbing. The sequence dictates that digging the foundations comes before building the walls; while dependencies include the fact that you cannot start installing doors and windows until the walls have reached a certain height; or you cannot finish plastering until the plumbing has been fully installed. Dependencies may also occur between otherwise unrelated activities which will be undertaken by the same person.

Timing

Specifying the timing means making a realistic estimate of the duration of each activity, and then building it into the activity schedule to establish likely start-up and completion dates. Often though it is not possible to estimate timing with complete confidence. To ensure that the estimates are at least realistic, you should do two things: i) consult with people who have the necessary technical knowledge or experience; and ii) use your own experience from previous projects. Inaccuracy is a common mistake, usually resulting in an underestimate of the time required, and can arise for a number of reasons:

- omission of essential activities and tasks
- failure to allow sufficiently for interdependence of activities
- failure to allow for resource competition (ie. scheduling the same person or piece of equipment to do two or more things at once)
- a desire to impress with the promise of rapid results

Milestones/Process Indicators

Indicators have already been introduced in Section 3.1. Those included in an activity schedule are called *process indicators* (also referred to as *milestones*). These indicators will provide the basis by which project implementation is monitored and managed. The simplest process indicators are the dates which you have estimated for completion of each activity - eg. training needs assessment completed by January 1998. More substantial process indicators can be used as an indication of overall project progress, and might be linked to the phasing of a project. For example, a Tempus project might be separated into a development phase (including institutional and needs analysis) and an implementation phase. By establishing process indicators for the completion of Phase 1, you provide a measure of overall progress, and a target for the whole project team to aim at.

Expertise

When you know what has to be done, you should have a clear picture of what type of expertise will be required to do this. Often you will know in advance what expertise is available. Nonetheless, this provides a good opportunity to check whether the action plan is feasible given the human resources available.

Task Allocation

You should now allocate the tasks among team members. This involves more than just saying who does what. With task allocation comes responsibility for achievement of process indicators. In other words, it is a means of defining each team members **accountability** - to the project manager and to other team members.

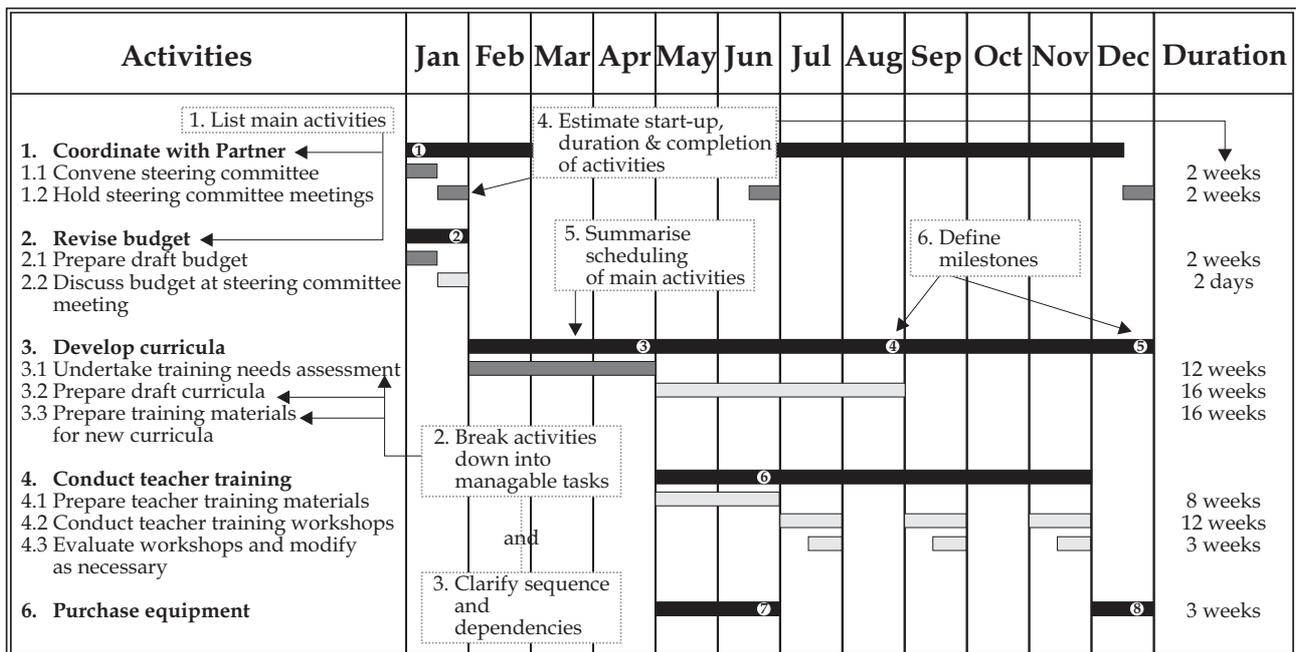
Task allocation must therefore take into account the capability, skills and experience of each member of the team. When delegating tasks to team members, be careful to ensure that they understand what is required of them. If not, you may have to increase the level of detail with which the relevant tasks are specified.

Presenting an Activity Schedule

All of the information in an activity schedule can be summarised in graphical format. This is called a Gantt Chart. An example is shown in figure 14. The format can be adapted to fit with the expected duration of the project. An overall project schedule may only specify activities on a quarterly or monthly basis, while an individual's quarterly workplan may use a weekly format.

Figure 14: Example of an Activity Schedule

Workplan for Tempus project



The duration refers to the effective time that the activity will last - for example, equipment purchasing may take place over a period of 8 months, but will only require 3 weeks work.

Although the above example was prepared in Microsoft Excel (a spreadsheet package), specialised computer software exists - for example, Microsoft Project, which has facilities for preparing activity schedules and budgets.

Step 8 - Specifying Inputs

With the activity schedule prepared, the job of further specifying inputs and scheduling costs can be started. The format in which inputs and costs should be presented and summarised will depend on the procedures of the organisation for whom it is being prepared - e.g. donor organisation - and the stage of the project cycle - e.g. preparation of financing proposal.

Once again the list of activities should be copied into an input and cost schedule pro-forma. Each activity should then be used as a checklist to ensure that all necessary means under that activity are provided for. Regardless of the format in which the information is to be presented, there are a number of issues which should be addressed.

A Checklist for Preparing a Cost Schedule

The steps involved in cost schedule preparation are:

1. List the means required to undertake each activity
2. Put means into cost categories
3. Specify units, quantity and unit costs
4. Specify funding source
5. Allocate cost codes
6. Schedule costs
7. Estimate recurrent costs
8. Prepare cost summary tables

Specify Means

The list of activities used in the activity schedule should be copied into the cost schedule format. Each activity should then be used as a checklist to ensure that all necessary means (or inputs) under that activity are provided for. The means should be described clearly and precisely in the activity/means column. As with the work breakdown structure, it is important to get the level of detail right. If the same input appears under many activities (eg. stationery) then it is useful to aggregate this under one activity, and make an appropriate note on the schedule. If there are activities for which no costs are indicated, it may be sensible to leave them out of the cost schedule - they will not be forgotten as they still appear in the activity schedule.

Put Means into Cost Categories

The purpose of categorising means and costs is to provide the basis for analysing expenditure estimates, and then monitoring expenditure patterns and progress. By dividing a project up into components, costs can be categorised by activity area (eg. management, research, training) by adding the totals for each component. There is also a need, however, to specify the cost items within components, and to aggregate them between components. It is usual, for example, to want to know

(among other things) total personnel, equipment and material supply costs irrespective of which project component they are included under. This is achieved by allocating inputs and costs to established cost categories.

At the most aggregated level, these costs are normally shown as Capital Costs and Operating Costs. Within these two categories, costs are further divided into types of capital or operating expenditure. As a general rule, it is best to divide your costs into no more than 10 further categories for the purpose of presenting cost summaries in a project design document. The categories used by Tempus are:

Organisational Grants	Mobility Grants
■ Staff costs	■ Staff Mobility
■ Equipment	■ Student Mobility
■ Other Costs	
■ Overheads	

In practice, the project planner will usually be given established cost categories to work with. It is important that the planner fully understands what these categories do and do not include.

Figure 15: Example of Categorising Means

<p>With the cost categories determined, means should be listed under each activity by category. For example:-</p> <p>1.1.1 Prepare training materials</p> <p><u>Staff costs</u> External expertise (academic fees and administrative costs)</p> <p><u>Mobility</u></p> <p><u>Equipment</u> Photocopying facilities</p> <p><u>Overheads</u> Office supplies</p> <p><u>Other</u> Travel inside the EU and local travel</p>
--

Specify Units, Quantity and Unit Costs

Once all the required means have been accounted for, the units (kilograms, months, etc.), quantities required, and unit costs can be specified and entered into the table. Quantity and unit cost data can then be used to compute actual quarterly, annual and total costs and (referring back to the activity schedule) scheduled in the appropriate time-frame. As with the activity schedule, timing intervals can be adjusted to fit the planning period - for example, an annual budget need only be scheduled in a quarterly format, while a quarterly budget will use a weekly format.

It is vital that project costings are based on accurate and realistic figures if a meaningful appraisal of costs and benefits is to be subsequently carried out, and the correct investment decisions made. Unit costs of inputs to be purchased from private suppliers should be checked by adequate investigation of the current market.

Unit costs need to be identified for all inputs. Where this is difficult, (for example, developing training materials), it might be more practicable to allocate a lump sum for materials (based on previous experience of resource requirements), and specify therefore that one unit is required at the time when materials are to be developed. In such cases, the 'unit' column can simply be described as 'lump sum'.

Specify Funding Source

All Tempus projects are supported by external finance as well as domestic resources. Project costings should thus show the allocation of costs between the different funding sources so that each party is clear about their respective contributions. How costs are to be allocated should be determined through discussions between the partners and Tempus.

The 'funding source' column in the cost schedule should be given a letter code to show who is funding the inputs in question. This letter code can then be used to sort all identified costs to determine respective totals.

Schedule Costs

Costs should be calculated in constant prices, and an allowance for physical contingencies may be shown separately. Costs are scheduled in the spreadsheet through using simple formulas to multiply the annual quantity by the unit cost.

Estimate Recurrent Costs

At the end of the project life, the partner university will be required to meet any recurrent costs of maintaining the activities or facilities that have been established by the project. These costs may be covered (fully or partly) through increased revenue that has been generated through project activities (e.g. course fees). Whether or not this is the case, it is important that the net recurrent cost implications of the project are clearly specified so that the future impact on the university's budget can be determined.

The analysis of recurrent cost implications should begin with identifying those costs which are likely to continue at the end of the project's life. The most likely areas in which these costs will occur are:

- Staff costs, allowance and training costs
- Mobility, local travel and travel within the EU
- Maintenance of equipment
- Utility costs (such as electricity, water and telephone charges)
- Consumable materials and supplies (such as stationery, food, teaching materials, medical supplies)

An example of a cost schedule is presented in figure 15.

Figure 16: Example of a Cost Schedule

Activities	Unit	Quantity per planning period				Cost per unit	Funding source	Costs per planning period				Project total	Annual recurrent costs
		1st atr	2st atr	3st atr	4st atr			1st atr	2st atr	3st atr	4st atr		
4. Conduct teacher training													
4.1 Prepare teacher training materials													
Staff costs													
Internal personnel	manmonths	6	6	6	6	1.000	Partner	6.000	6.000	6.000	6.000	24.000	
External experts	manmonths		1	6	1	2.000	Tempus	0	2.000	0	2.000	4.000	
Equipment													
Computers	no.	8	4			1.200	Tempus	9.600	4.800	0	0	14.400	
Printer	no.	1	3			600	Tempus	600	1.800	0	0	2.400	
Stationery	lump sum	1				2.000	Tempus	2.000	0	0	0	2.000	2.000

Prepare Cost Summary Tables

With the cost schedule properly prepared, the job of preparing cost summary tables is made much easier. If it has been entered into a computer spreadsheet, most programmes will allow you to sort your costs using the codes you have used to show funding source and input/cost code.

A summary of project costs should be presented. The summary tables should usually include:

- partner university contribution by cost category and year
- local contribution by cost category and year
- total costs by cost category and year
- partner university, local and total costs by project component
- and recurrent cost implications

Summary: The Logical Framework Approach - A Step-by-Step Guide

- A properly planned project addressing the real needs of the stakeholders cannot be achieved without an analysis of the existing situation. Thus it is important to bring together representatives of all key stakeholders in the Analysis Phase.
- The logframe, for all its advantages when clearly understood and professionally applied, provides no magic solution to identifying or designing good projects. It must be seen as a dynamic tool, which should be re-assessed and revised as the project itself develops and circumstances change.
- Objectives should have the following characteristics: They should be
 - Realistic, Specific and Measurable
- Simply stating an objective is not sufficient. To ensure that an objective is measurable, it must be accompanied by indicators which specify Quantity, Quality and Time (often known as QQT).
- The measurement column specifies the source of information and means of collection should be specified. It should include
 - the format in which the information should be made available
 - who should provide the information
 - how regularly it should be provided
- Means are the human, material and financial resources required to undertake the planned activities and manage the project. In order to provide an accurate estimate of the means and costs required for a project, planned activities and management support activities must be specified in sufficient detail.
- An activity schedule is a method of presenting the activities of a project which identifies their logical sequence and any dependencies that exist between activities. It is also used as a means of identifying who will be responsible for implementing an activity. The main skill is in getting the level of detail right. The breakdown should stop as soon as the planner has sufficient detail to estimate the time and resources required, and the person responsible for doing the work has sufficient instructions on what has to be done.
- It is vital that project costings are based on accurate and realistic figures if a meaningful appraisal of costs and benefits is to be carried out subsequently, and the correct investment decisions made.
- At the end of the project life, the partner university will be required to meet any recurrent costs of maintaining the activity or facility that has been established by the project. It is important that these costs are clearly specified so that the future impact on the university's budget can be determined.

Chapter 1.3 The Logical Framework Approach and Objective-Oriented Project Implementation

Projects are risky and uncertain things requiring that scarce resources are utilised efficiently to achieve agreed objectives in a cost-effective and timely manner. This is the task of project management. In order to achieve this, project managers must undertake a whole series of generic management tasks, quite apart from the activities of the project itself. These include:

- further specify the project objectives, using the planning documents, as a basis for preparing a detailed implementation strategy
- develop appropriate activities and determine the required inputs and outputs
- select realistic, measurable performance indicators
- prepare realistic workplans and schedules, based on available resources and staff capabilities
- determine the organisational requirements for implementation, and allocate responsibilities among units and staff
- supervise the performance of staff and units
- maintain detailed records of physical and financial progress
- monitor the project, so that adjustments can be made to ongoing or planned activities
- provide periodic reports to the responsible agencies and institutions (e.g. European Commission, the Foundation)

Applying the LFA to a Pre-Designed Project

It is common for the logframe approach to be applied to projects after identification has been completed. However, the logframe approach remains a powerful management tool for analysis of project design, as well as for project design itself. The only difference is that the source of information for problems is the identification document or project document rather than primary data sources such as interviews, surveys, reports and statistics. Therefore, if a logframe has not been prepared already, the manager should develop one on the basis of available documentation.

The identification document (Feasibility Study, Project Proposal or Preparation Report) should contain a description of the problems which the project is designed to address and should specify overall objective(s), specific objectives, outcomes and activities. The procedure for applying the LFA is as follows:

1. Mark the problems listed in the document
2. Build a problem tree

3. Reformulate these problems into objectives
4. Mark the objectives listed in the document
5. Compare objectives listed in the document with the reformulated problems:
 - for those which are identical mark one with * and discard the other
 - for those objectives listed in the document but which do not have a corresponding reformulated problem, mark with !
6. Build an objective tree:
 - Objectives marked * refer to objectives and corresponding problems listed in the identification document
 - Objectives marked ! refer to objectives listed in the identification document but with no corresponding problem listed
 - Objectives not marked refer to those for which only problems were listed in the identification document
7. Analyse inconsistencies in the project's design:
 - problems not addressed by objectives
 - objectives for which no corresponding problem was identified
 - differences in cause-effect/means-ends relationships between the problem tree and objective tree
8. Formulate questions to be addressed during next stage of project preparation, and which will lead to project redesign
9. Prepare the logframe, activity schedule, resource and cost schedules as described earlier

Monitoring and Reporting

Once a project has been planned and financial support been secured, the most important part begins - implementation. It is very rare for any project to go exactly according to plan. In fact it is not uncommon for a project to take on a direction and a momentum that was completely unanticipated during planning. Project management now has the important and difficult task of establishing sufficient controls over the project to ensure that it stays on track towards the achievement of its objectives. This is done by *monitoring* which can be defined as:

the systematic and continuous collecting, analysing and using of information for the purpose of management control and decision-making.

Project monitoring is an integral part of day-to-day management. Its purpose is to provide the information by which management can identify and solve implementation problems, and assess progress in relation to what was originally planned.

On a Tempus project, monitoring is undertaken at three distinct levels:

- By the **project team**, for the control of day-to-day activities;
- By the **contractor**, through formal progress reports to the Foundation's Programme Manager; and

- By **external monitors**, who are independent of contractors and report to all parties involved in the project and make recommendations for decision making.

Designing a Monitoring System

There are five steps in the design and specification of a monitoring system:

1. **Analyse project objectives** to clarify project design. Good monitoring depends on clearly stated objectives. The logframe approach helps to ensure that objectives are correctly written and that actions are designed to lead to outputs and objectives. This logical sequence simplifies the choice of monitoring indicators.
2. **Review implementation procedures** to determine information needs at the different levels of the project management structure. The level of detail of information required, and the frequency of reporting, will vary according to the level of management. Essentially, this step means matching information needs to decision-making roles.
3. **Review indicators** for use in measuring achievement of objectives. Within the project implementation team the priority focus will be on physical and financial monitoring of activities and outcomes. The tools for this are good record keeping for comparison of actual expenditure against budgets, and progress against the project's activity schedule.
4. **Design report formats** to provide managers at different levels within the project with access to relevant and timely information which facilitates easy analysis.
5. **Prepare an implementation plan for the monitoring system** which specifies the necessary staff, skills and training required, and clearly allocates information collection and reporting responsibilities.

Analyse Project Objectives

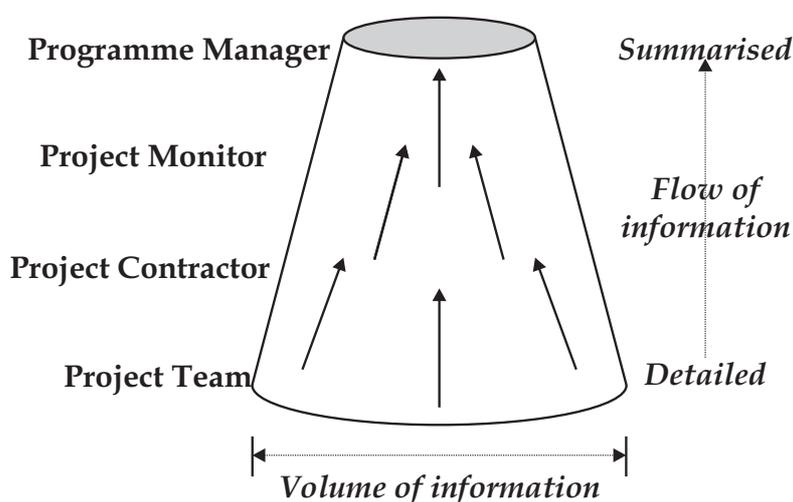
Analysis of objectives during project design has been dealt with in section 3.1. However, some time may have passed since the project was designed, and the project environment or the actors involved may have changed. It is sensible therefore to start implementation with a project start-up workshop. The purpose of this workshop would be to bring together the stakeholders to review project documents and key assumptions. Project objectives should be revised to ensure that they are clearly stated and remain realistic, specific and measurable. These will now form the basis for the Monitoring & Evaluation system.

Review Implementation Procedures

The logframe provides the framework for identification of information needs as a whole. It is important though to relate information needs to the different levels of the management structure. In reality, the level of detail of information required and the frequency of reporting will vary according to the level of management. For example, project administrators will need information about day-to-day activities, while the contractor will require more summarised information about achievement of outputs or deviations from the workplan which he/she may need to forward to the programme implementation agency. Figure 16 illustrates this principle. A review of implementation procedures involves a review of what activities will be undertaken and by whom. This should be done with reference to the activity schedule.

By reviewing implementation procedures (who does what) in consultation with partner institution staff, the various roles, functions and responsibilities are clarified, and a clear link can be made between information needs and levels of management. This process can be assisted by drawing up a table which lists the information user, what is required, the source of the information, and who is responsible for preparing the report.

Figure 17: Information Needs and Levels of Management



Effective reporting is dependent on the users and reporters having a common understanding of why a report is required and what it will be used for. However, experience shows that this approach has two important weaknesses; first, it assumes that users know what they need in advance, second, users tend to request more information than they really need. Both situations are to be expected during the early stages of a programme when the roles and functions of university and partner staff are still being clarified. In practice they may not be resolved over time when a third weakness may become apparent; users are not aware of what information is available. Given that both the users and uses are expected to change over time the identification of information requirements will be an iterative process, and the onus will be on those responsible for Monitoring & Evaluation (M&E) to undertake a continual review of users requirements through:

- attending planning and review meetings to note what appears to be lacking or redundant for effective decision making
- encouraging comments and suggestions on the content and format of reports directly from user to reporter

Review Indicators

Selection of indicators has already been discussed in Chapter 1.2. However, poorly specified indicators have frequently been cited as a major weakness in the design of M&E systems. Common problems encountered in the selection of indicators include:

- **selection of too many indicators** - People have a tendency to over-estimate the amount of information they need to make decisions. Specification of information needs involves a trade-off between the amount of information required to make decisions, and the amount of information that a decision-maker can practicably read and analyse. All too often, a manager over-specifies his or her information needs, only to find that it is simply impossible to read the reports and absorb the information contained in them. Information needs must be related to levels of management,

and selection of indicators should reflect this through the specification of a minimum set of information. More detail is required at the day-to-day operational level, while aggregated and summarised data is used at higher levels.

- **selection of overly-complex indicators** which present major problems for data collection, either in terms of the skills or the resources required. Qualitative indicators are also a means of conveying complex information in summarised form.
- **over-concentration on progress indicators** which provide insufficient information on the performance of the project. A common response to such a criticism is that it is not possible to measure impact during the lifetime of a project. However, by using *leading indicators*, it should be possible to gain a clear indication of the likelihood of achieving objectives - if clients are satisfied with the services being provided by the project, then it is likely that they will continue to utilise these services and therefore that this change in their behaviour will translate into real benefits in the longer term. Selection of impact indicators is a critical part of project design and can in fact sharpen definition of objectives and identification of intended clients. It should form an important focus for early discussions between project partners.

Reporting

Project managers will want to review progress very frequently, perhaps weekly or fortnightly, against their contracted budget and planned activities. Much of this data will be of an operational nature for internal use by the project team. A few selected items, plus aggregated data on equipment and materials, are considered 'key' indicators for reporting in the progress reports.

Management Tip 2: Recording and Reporting

- A manager must have timely and relevant information on which to make decisions. Take time to establish what your most important information needs are. Too much information can be as much of a problem as too little.
- Create a structured filing system, even for a small project of short duration. Date and file a copy of all correspondence sent and received.
- Respond to reports from your colleagues. Lack of feedback is a major cause of breakdown in reporting systems.

Monitoring cannot be described as being successful simply because the required information is collected. The information collected must be communicated - in the right form, to the right person, at the right time. Only then can timely and appropriate management decisions be made to address problems and ensure that the project is brought 'back on track'.

Mechanisms for communication must be established to ensure that the necessary information is generated and utilised in a timely and effective manner. Two important types of mechanism are:

- **Project progress reports** - these are periodic summaries (perhaps weekly, monthly or quarterly) of project progress incorporating key information from the physical and financial indicators included in the logframe, activity schedule and cost schedule. It is not sufficient for team members to report simply that 'things are going according to plan'. They must also provide the evidence of this.
- **Progress review** - get together on a regular basis to review progress against the plan. This may be an opportunity for written reports to be presented and discussed, or simply for a rapid oral assessment of current issues and problems. However, reviews can be damaging if they are too frequent or too drastic. The temptation is often to go back to the plan and adjust it in the light of experience. This is acceptable up to a point, but if you find yourself spending more time *planning* than *doing*, then you have obviously got the balance wrong. It is also at times of crisis that organisations focus more on task accomplishment and forget about the process. Try to build on achievements rather than just continually adjusting the plan.

Progress Reports

Progress reports are usually written in a standard format allowing for comparison between reports over time. The contents of the reports should match closely the logframe and its related outputs - ie. the activity schedule, budget and cost schedule. In each of these, targets will have been set: in the logframe, indicators of achievement (specifying quantity, quality, time) will have been identified at the levels of outcome, specific objectives and overall objectives; while in the activity schedule milestones will have been established for the completion of activities; and in the cost schedule, expenditure will have been estimated and placed in a calendar.

The purpose of progress reports is to provide updates on achievements against these indicators and milestones, using the following framework:

Data about **intended achievements**, is compared with

- Data on **actual achievements**, to identify...
 - significant **deviations from plan**, as a basis for...
 - identification of **problems and opportunities**, to identify...
 - corrective **action and alternatives**.

Within this framework, the report should cover the following areas:

- A summary of the current status of the project against indicators for specific objectives and outcomes
- The major activities undertaken during the period of the report, as compared to the activity schedule
- Expenditure during the period of the report, and cumulative to date, as compared to the budget and cost schedule
- Estimates of the number of clients or beneficiaries served during the period
- The current and anticipated problems, including planned remedial actions
- Planned major activities and schedules for the next period.

Managing Project Financial Resources

Once approval has been given for a project to start, financial management can begin. Financial management is concerned with the preparation of budgets for the those working under the project, setting up arrangements to receive and make payments, monitoring and reporting actual expenditure compared with planned estimates, and preparation of historical accounts.

Accounting records must be kept to ensure regulations are complied with. Accounts may have to be audited and so this duty must be taken very seriously. Financial management is an important element of overall project management and whoever undertakes this role makes an important contribution to the management team.

Planning a Budget and Cashflow

The first task for the financial manager is to review the proposed budget in the project document. If the project is approved soon after the application was prepared, the original budget should remain valid. However, if a long period of time has elapsed since preparation, or parts of the proposal were amended, the budget should be recalculated to match the approved funding.

Terminology

Three similar terms are used for financial planning. They each have different meanings:

- A **budget** is a statement of the resources required to carry out a task, and the unit prices and total costs of the task.
- A **cost schedule** contains the same information as a budget, but shapes the information and places it in a time frame. Cost schedules are described in Chapter 1.2. step 8.
- A **cashflow** sets out both receipts (income) and payments (expenditure) in a time-based table, with the items shown in the exact time period when the transaction is expected to take place. The net balance from each time period is accumulated for the duration of the cash flow to show periods of surplus and deficit.

Once the budget is in order, the next step is to prepare a cashflow. A cashflow is similar to a cost schedule but it:

- shows both expenditure and sources of income
- analyses expenditure and income in the time period when each will occur
- enables the calculation of the net balance of funds available to the project - this is to help estimate whether purchases are affordable at a given date

Cashflows can be prepared with either short (one week or one month) or long (three or six-month) time periods. For most projects a monthly cashflow would be the most appropriate scale.

An example of a cashflow is presented in Figure 18. The example shows that some receipts and payments are regular, occurring every month, while others are 'lumpy' and only occur at specific times. The result is that in four of the months, the resulting Net Balance is negative. If the project has no way of financing this deficit, plans must be made to defer some expenditure until there are enough funds to meet payments. Alternatively, it may be possible to bring forward the dates of receipt of income.

Figure 18: Example of Project Cashflow

Items	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
INCOME												
Government grants	15,000			15,000			20,000			20,000		
University	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000
Tacis/Tempus		19,000				4,500	4,500			6,000		
Sub Total	27,000	31,000	12,000	27,000	12,000	16,500	36,500	12,000	12,000	38,000	12,000	12,000
EXPENDITURE												
Office rent & cleaning	40	2,790	40	40	2,790	40	40	5,000	60	60	5,000	60
Telephone/fax		886			886			886			886	
Equipment hire		386		386			386			386		
Printing, stationery	350	350	350	350	350	350	350	350	350	350	350	350
Canteen	25	25	25	25	25	25	25	25	25	25	25	25
Staff costs	13,407	13,407	16,644	15,694	15,694	16,138	16,138	16,138	16,138	16,138	16,138	16,138
Laboratory equipment					4,500					6,000		
Air travel		1,500					4,500					
New vehicle		17,500										
Vehicle operating		295	295	295	295	295	295	295	295	295	295	295
Sub Total	13,822	37,139	17,354	16,790	24,540	16,848	21,734	22,694	16,868	23,254	22,694	16,868
NET INFLOW/OUTFLOW	13,178	-6,139	-5,354	10,210	-12,540	-348	14,766	-10,694	-4,868	14,746	-10,694	-4,868
Balance brought forward	0	13,178	7,039	1,685	11,895	-645	-993	13,773	3,079	-1,789	12,957	2,263
Net Balance	13,178	7,039	1,685	11,895	-645	-993	13,773	3,079	-1,789	12,957	2,263	-2,605

The cashflow is an important planning tool:

- it shows the projected financial situation of the project at a glance;
- it is easy to read even for non-financially trained team members;
- if prepared on a computer spreadsheet it is easy to update and amend; and,
- it forms the basis for management reporting.

Keeping Accounts

If the project is a large one it is most likely that a professional accounting department at the contractor's office will handle the practical issues of keeping historical accounts. For smaller projects, however, and in some other cases of personal preference, project managers may wish to keep their own records. The best way is to use double-entry bookkeeping, a standard internationally recognised technique, and beyond the scope of this manual.

For smaller-scale projects or personal records a simple single-entry analysis ledger is usually adequate. The ledger is used to record each item of income or expenditure and analyse by source and application. The categories of analysis should match the expenditure categories used in the cost schedule and cashflow, although more detail can be kept if required. An example of an analysis ledger is presented in Figure 19.

Figure 19: Example of an Analysis Ledger

Item	Date	Serial No.	Amount	Office	Phone	Equip	Print	Canteen	etc.
Cleaner	28/07/97	Natalia 23	38.50	38.50					
Coffee	20/07/97	PC 22	15.00					15.00	
Soap and cloths	29/07/97	PC 23	7.50	7.50					
Phone bill	05/08/97	Tel 677	674.00		674.00				
Photocopier service	07/08/97	OEM 44	145.00			145.00			
Fax & letterhead paper etc.	08/08/97	Print 82	126.00		56.00		175.00		

The example shows how systematic records of payments enable a running check to be kept about expenditure against project categories.

Managing the Financial Data

Regularly, not less than monthly, the financial manager should prepare an analysis of the expenditure and income, by category. This analysis can then be compared with the budget and the cashflow. The purpose of the analysis is to identify any situation where the actual performance has deviated from plan. There are many reasons why expenditure might vary from plans: foreign exchange variations; price inflation; changes in equipment specification; and change in quantities ordered. No plan is perfect and it is to be expected that actual performance will vary. Close financial monitoring will ensure that the project manager is kept fully informed and can react to changes before they cause unexpected problems.

Financial reports

Periodically, most typically at quarterly or six monthly intervals, a formal set of financial reports should be prepared to compare actual expenditure against the budget. The reports should be prepared for the project as a whole and for individual partners if they are separately managed. Summary reports should also be prepared to analyse expenditure by category and by source of funds (this is especially important in cases where the project receives funds from more than one donor).

The analysis should show the budgeted amount for the year, the cumulative expenditure to date and the balance remaining. An example is shown in Figure 20.

Figure 20: Example of a Financial Report

Item	Budget	Cumulative Expenditure	Balance remaining
Staff costs	27,000	21,240	5,760
Equipment	17,750	12,670	5,080
Overheads	5,400	3,000	2,400
Mobility	37,125	28,150	8,975
Other	11,000	7,580	3,420
Totals	98,725	72,640	25,635

After the analysis has been finalised the cashflow should be updated for the following six- or twelve month period. In this way, the cashflow becomes a 'rolling' tool, for the project manager.

Project Review and Evaluation

Evaluation can be defined as a periodic assessment of the relevance, efficiency, effectiveness, impact, economic and financial viability, and sustainability of a project in the context of its stated objectives. The purpose of evaluation is to review the achievements of a project against planned expectations, and to use experience from the project to improve the design of future projects and programmes. Evaluation draws on routine reports produced during implementation and may include additional investigations by external monitors or by specially constituted missions.

Evaluation Criteria

A major issue which affects any evaluation is the choice of criteria. The EU uses the following criteria:

- 1 **Relevance** - the appropriateness of project objectives to the problems which it was supposed to address, and to the physical and policy environment within which it operated
- 2 **Economy** - the cost and quality of project inputs (human and material)
- 3 **Efficiency** - the cost-effectiveness with which inputs and activities were converted into outputs, and the quality of outputs achieved
- 4 **Effectiveness** - an assessment of the contribution made by outputs to achievement of the specific objectives of the project, and how assumptions have affected project achievements
- 5 **Impact** - the contribution of the project to the wider sectoral objectives summarised in the project's Overall Objectives, and to the general development objectives
- 6 **Economic & financial viability** - the social costs and benefits of the project in terms of its impact on income distribution, macroeconomic, budgetary and other 'macro' variables
- 7 **Sustainability** - the likelihood of a continuation in the stream of benefits produced by the project, particularly continuation of the project's activities and achievement of outcomes, and with particular reference to development factors of policy support, economic and financial factors, socio-cultural aspects, gender, appropriateness of technology, ecological aspects, and institutional capacity

Linkage to the Logframe

The steps involved in an evaluation exercise closely follow the hierarchical objective structure of the project design. By following this systematic approach all aspects of the project's achievements are evaluated.

Costs

Actual input costs compared to plan - this is the basis of variance analysis. Was there a budget revision; how did the nature and timing of inputs compare with plan; did the recipient agency or other donors fulfil their planned contributions? These data will have been monitored and reported in progress reports. Such reports are a key source of data for evaluation.

Activities

Actual schedule and completion compared with plan. Were there delays or time savings? Which organisation was responsible for delays? What effect did deviations from plan have on the project? These data will have been monitored and reported in progress reports. Action to overcome problems and an independent assessment of progress will also be available from the reports produced by external monitors.

Outcomes

Indicators of the immediate output from project activities compared with plan. Many of these indicators will be process indicators which report successful completion of a task e.g. new curriculum drafted and approved by September 30th. Others will be quantified targets such as number of managers training in market analysis. A third level is concerned with the efficiency of project activities.

Efficiency indicators compare actual inputs as a ratio of actual outputs: e.g. average cost of training per participant; number of graduates being advised per careers advisor per month; percentage of recent graduates finding jobs in their specialist disciplines. Most of these data will be obtainable from project records and will have been reported in progress reports. Calculation of these ratios will permit comparisons to be made over the life of the project, to see if performance has improved, and comparison with other projects.

Specific Objectives

Indicators of the achievement of project objectives through the creation of outcomes. These effectiveness indicators show whether or not the project has achieved its purpose and whether project activities are sustainable. Eg. Do students put their new skills and knowledge into practice; does the operational performance of social welfare agencies improve after hiring newly trained graduates from university?

If the project's actual performance does not compare well with the plan, the evaluator must investigate further. Is the poor performance due to problems arising from the initial problem analysis, from the project design, or from implementation? Three of the sustainability factors are of special importance here. To what extent was the institutional and managerial capacity of the project accurately assessed? To what extent was necessary policy support properly implemented? To what extent was the financial viability of the proposed organisation adequately appraised?

Lastly, the evaluation should examine the standard and quality of goods and services generated by the project, in the opinion of final beneficiaries. E.g. Have trainees gained new skills? Do their employers find those skills to be relevant and beneficial? Evaluation of effectiveness and sustainability will require the evaluator to gather data from outside the project organisation, through meetings and visits to beneficiaries and other organisations.

Overall objectives

The final stage is to assess the contribution of the project to the wider sectoral objectives, e.g. the overall aim of the Tempus programme. Because each individual project is just one element in a programme of activities, assessment of overall objectives may be best undertaken as part of a thematic or sectoral evaluation, e.g. external evaluation of the whole Tempus programme.

Opportunities for Evaluation

The approach adopted by many agencies, including the World Bank and DG VIII of the European Commission, is to programme formal evaluation reports at specific stages in the project cycle and to supplement these with *ad hoc* studies. The specific reports would typically be:

- **At Mid-Term**, in the case of projects lasting longer than 15 months. The objective of such a report is to review progress and propose alterations to objectives and activities.
- **At Project Completion**, to document the resources used, results and progress towards objectives. The objective is to generate lessons about the project which can be used to improve future designs.
- **After Completion**. An *ex post* evaluation is undertaken some time after implementation is finished, perhaps as long as two or three years. The main objective is to study the effects and impact on the partner institution and the sectoral impact, sufficiently long after implementation for issues of sustainability to have stabilised.

Further *ad hoc* studies are used to investigate themes, such as sectoral projects within one country for example; common designs undertaken in several countries, such as economics projects; or types of intervention, such as curriculum development. The advantage of themed studies is that several small projects can be evaluated at one time and their results related to wider policy objectives.

Evaluation Protocol

The objectives and scope of the evaluation should be clear to all involved. This includes making sure that the project has a clearly defined idea as to how the evaluation information will be used. Consultations must therefore be held to make sure that the needs of all parties to the evaluation are covered by the original project proposal and the workplan.

All necessary documentation should be prepared prior to the evaluation to provide background information pertinent to the key areas being evaluated. Examples are project description, the project's aims and objectives, the logframe matrix, chronological presentation of project phases, survey of costs and budgets, copies of key documents, target and actual outcomes of different types of microprojects and any other details relating to project implementation.

Summary: The Logical Framework Approach and Project Implementation

- LFA can be applied to a pre-designed project. The main difference is that the source of information on the problems is project documentation rather than primary data sources.
- Monitoring is defined as the systematic and continuous collecting, analysing and using of information for the purpose of management control and decision-making. The purpose of monitoring is to provide the information by which management can identify and solve implementation problems, and assess progress in relation to what was originally planned.
- There are five steps involved in designing a monitoring system:
 - Analyse project objectives
 - Review implementation procedures
 - Review indicators
 - Design report formats
 - Prepare an implementation plan for the monitoring system
- Successful monitoring involves more than just the collection of information. It requires that the information is communicated to the right people in the right form at the right time.
- Evaluation is an assessment of how well a project has succeeded in meeting its direct objectives and contributed to wider sectoral goals. It is undertaken after implementation and draws on data produced by monitoring, but also requires information from outside the project about the project's impact on target beneficiaries.
- There are seven fundamental elements to be examined during evaluation:
 - relevance - the appropriateness of project objectives
 - economy - acceptable level of costs incurred
 - efficiency - correct use of resources to produce outcomes
 - effectiveness - did the outputs achieve the specific objectives
 - impact - the contribution of the project to its wider sectoral objectives
 - economic & financial viability - the social costs and benefits of the project
 - sustainability - the ability of project-created entities to continue operations
- The structure of the logframe provides a framework for systematic evaluation. Integrated documentation ensures that objectives, risks and sustainability are investigated during preparation. This helps evaluation by providing a logical structure for the project and by identifying appropriate indicators.
- Formal mid-term, completion and ex-post evaluations can be supplemented by ad hoc, thematic or sectoral studies.

Part 2:

Project Management Skills

Project management is not just about setting objectives and preparing progress reports. It is also about managing people. For this, everyday skills are required - for example, how to make yourself clearly understood during a meeting, or how to use your time efficiently. Although often taken for granted, these skills can sometimes mean the difference between success and failure. **Part 2 provides some guidelines on how to improve your everyday project management skills**, to help you in your own work, and in your interaction with others.

Chapter 2.1 outlines the benefits of **teamwork**. It explains the four stages of group development, and suggests a number of techniques that can enhance group sharing of roles and responsibilities, and therefore lead to improved team performance.

Chapter 2.2 looks at how to make oral and written **communication** more effective. It stresses the need to plan oral communication in advance wherever possible, and to keep written records of oral agreements and decisions. Guidance is provided on how to structure and present clear and concise written communications so that the information contained in them is received and understood.

Chapter 2.3 explains that **meetings** are a management tool to achieve effective communication, and to save time. It outlines how to plan for, and manage a meeting effectively. It emphasises the need for a well thought out agenda, and for keeping good records in the form of action minutes.

Chapter 2.4 explains the importance of managing the use of one of your most valuable resources - **time**. The section briefly describes the main causes of poor time management, and suggests the use of: i) a daily diary; ii) the prioritisation of work functions and tasks; and iii) the allocation of a short amount of time to plan each day, week and month.

Chapter 2.1 Teamwork

The principle underlying teamwork is that the collective effort of a group can produce a greater effect than the combined efforts of individuals. Although this sounds a little like saying that $2 + 2 = 5$, it is often the case that a group can be more productive together than working separately - for example, by 'bouncing' ideas back and forth, or by building on each others different perceptions and knowledge.

However, just because a group of people are working together on a particular task does not mean that they are operating as a team. To be classified as a team, the group should be viewed as a self-managing unit, which operates in the spirit of cooperation, coordination and commonly understood procedures. This in turn leads to a number of advantages:

- **Decision-making** - a team whose members are involved in making decisions, in setting objectives and establishing work practices, will be better able to make decisions about their own work, requiring less supervision and management from above.
- **Motivation** - through belonging to a team, individuals can participate in team achievements which may be beyond their own individual potential. With shared recognition for success comes shared accountability for team actions. Thus there are opportunities for enhancing self-esteem from team successes, and minimising stress through shared responsibility for failure.
- **Innovation** - teams are particularly good in situations where there is no established approach or procedure. This is particularly the case for organisations undergoing change. By combining its broader base of skills and experience, the team can out-perform the individual.

The net result of these factors is that a team is often harder-working, and more efficient at completing a task than a group of individuals working without a group process.

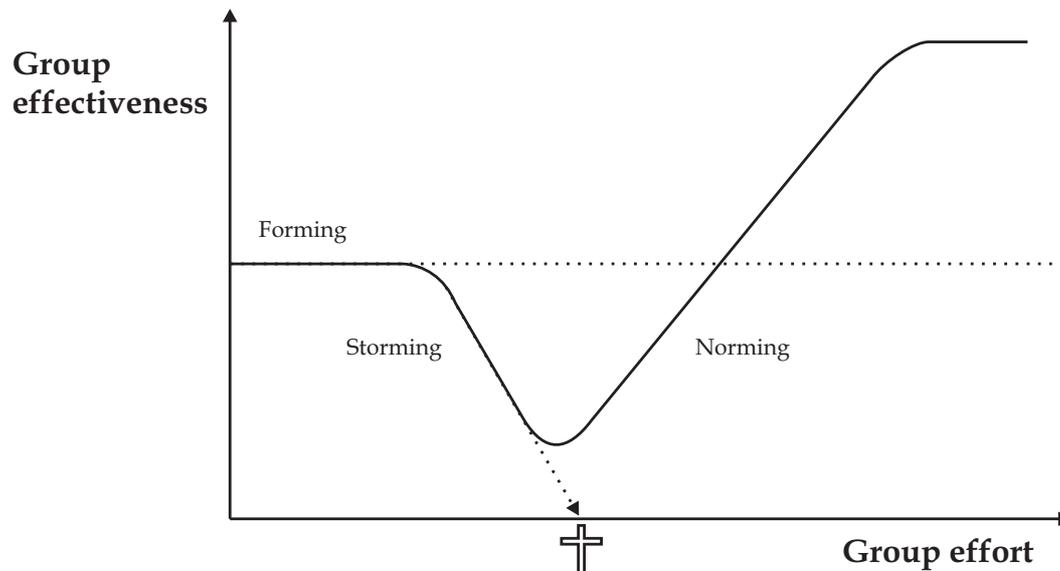
How Groups Develop

There are four recognised stages of group development which are explained below and illustrated in figure 21:

- **Forming** - when the group first comes together, everyone is polite and individuals are careful about voicing their own opinions. The groups tends to defer to its leaders
- **Storming** - factions form, personalities clash, and every agreement is the result of a fierce battle. Effective communication is not possible as no-one is listening. Many groups do not pass beyond this stage, and so collapse.

- **Norming** - the various factions begin to see the merits of working together, and a new spirit of cooperation emerges. Team members begin to feel comfortable in voicing their own opinions, and people start to listen to each other.
- **Performing** - the culmination of all of the battles when the group forms a cohesive and effective operating unit. A high degree of group support is provided to team members and to decisions made by the group. The level at which the group performs should be well above the level at which it was formed.

Figure 21: The Dynamics of Group Development



The speed with which a group becomes able to perform is a reflection of the time and effort spent in managing the group process. There are two types of skills which a group requires to be able to perform - managerial skills and interpersonal skills. It is the accelerated acquisition of these skills that reflects successful management of the group process. Management skills are explained below, while interpersonal skills are explained in Chapters 2.1 to 2.2.

Management Skills

The basic functions of a manager include strategic planning, setting goals, deciding budgets, monitoring performance, etc. The principle of teamwork is to enable the group to undertake management functions collectively.

In the short-term, a newly formed group may appoint a facilitator to suggest systems and structures which will enhance group skills and focus individuals minds on the group process. However, in the longer term, facilitation should be performed equally by every team member.

Some additional techniques for enhancing group sharing of roles and responsibilities include:

- **Brainstorm** - when new ideas are needed, hold a short meeting to generate suggestions from the group. Do not comment on any of the suggestions until the group has put forward all of its ideas, or the specified time period is up. Only then should each idea be analysed at length. In general, the more that ideas are bounced around within a group, the better will be the groups understanding of the task or problem in hand.

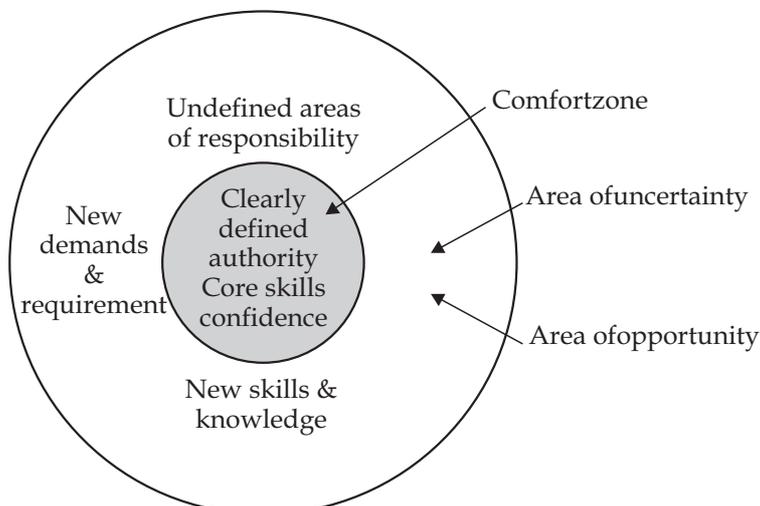
- **Avoid single solutions** - the first idea is not always the best. Look for alternatives, and evaluate them as a team. Even after a plan has been agreed, be prepared to change it.
- **Keep written records** - if decisions are not recorded, they may be forgotten or misinterpreted, and therefore need to be re-discussed. In group meetings, record decisions clearly on a flip chart as soon as they are made. Summarise these decisions, and the allocation of responsibility in *action minutes*.
- **Ensure constructive feedback** - make criticism neutral by focusing on the task and not the personality. Accompany every criticism with a positive suggestion for improvement. When somebody does something well, praise them for it. Emphasise what progress is being made.
- **Explore failure** - do not simply brush failures aside and move on. As a group, analyse why something did not work, and try and devise a mechanism that will ensure the same mistake is not repeated.
- **Share authority** - there should be no rigid hierarchy in the group. Authority should be assumed by the person most suited to the task, and relinquished as soon as the task is completed.

Putting these tips into practice is not always straightforward, but the first step is to recognise the need for time and resources to be allocated to the planning, monitoring and review of team development. One possible method of starting the group process is to start calling regular strategy meetings where the project's current position and direction are discussed openly, and the ideas and input of all team members are sought.

Your Role Within the Team

The role you have within your organisation and the project team has a major impact on your ability to influence your project and to be an effective administrator. Figure 22 represents a map of your role. Many of us operate in the central 'comfort zone' where we feel safe and confident because we have authority and are using our core skills. Therefore the risk of failure is low. However, as soon as we step outside this comfort zone, we begin to feel uncertain. We may be using only newly learned skills in which we are not yet confident; or new demands are being placed upon us; or we are unsure of what our role is. The response to this role map should not be to retreat into the comfort zone at every opportunity, but to expand the comfort zone by developing skills and confidence, and gaining greater authority in the eyes of others.

Figure 22: A Role Map



Summary: Teamwork

- A team is a self-managing unit which performs in an environment of cooperation, coordination and commonly understood procedures.
- There are four stages of group development: forming; storming; norming; performing
- The first step in building a team approach is to allocate time and resources to developing a team process. The speed with which a group of individuals becomes a team is determined largely by the importance which management attaches to this process.
- There are a number of techniques which can enhance teamwork:
 - brainstorm ideas as a group
 - avoid single solutions
 - keep written records of team decisions
 - ensure that all feedback is constructive
 - analyse failure to establish its causes
 - share authority among the team
- The individual's responsibility to the team lies in expanding his/her 'comfort zone' by developing his/her skills and confidence, and gaining greater authority in the eyes of the team.

Chapter 2.2 Communication

Oral Communication

Oral communication in the management sense does not refer to chatting, but to the conveying of work-related information. Whether the conversation is face to face, or over the telephone, oral communication includes *speaking* and *listening*. For effective oral communication, you must make your message understood; understand the messages sent to you; and exert some control over the flow of the conversation.

It is not generally appreciated that there is a method to conversation, but without it many problems will arise, especially when communicating across cultural and language boundaries. All oral understandings and decisions should be recorded. This is automatic in written communication, but oral agreements can easily be forgotten. By keeping a record of conversations and telephone calls, you reduce the chances of misunderstanding and disagreement.

Speaking

When you would like to talk to someone on a project-related matter, whether face-to-face or by telephone, you should try to plan it in advance. Make a note on paper what the purpose of the conversation is, and plan on how you want to achieve this - the points you need to make, the contextual information you should provide, and the questions you must ask. Tips for effective conversation are:

- **be assertive** - always state your points clearly, acknowledge the other person's viewpoint (even if you disagree), and state what should happen next as a result of the conversation.
- **maintain control** - being assertive does not mean being aggressive. Do not lose your temper as this will reduce the chances of the other person listening. Always check the facts to ensure that you have not misunderstood the situation.
- **use open questions** - do not ask closed questions which just elicit a 'Yes' or 'No' response. By asking open questions, you encourage the other person to provide more detailed information.
- **listen** - do not forget that a conversation is a two-way process. Let the other person convey information to you.
- **summarise** - at the end of the conversation, summarise your understanding of the outcome - what should be done next?

Listening

When listening to someone else speaking, there are some simple tips which can help reduce the chance of a misunderstanding.

- **Repeat it** - after the other person finishes speaking, seek confirmation of what was said - “So, if I understand you correctly, what you mean is that...”
- **Record it** - after the conversation, spend a couple of minutes jotting down on a piece of paper what was said, who said it, the date and time, and put it in the relevant file
- **Write back** - if the conversation covered some particularly important information which may affect you or your organisation significantly, write back to the speaker, confirming what was agreed. This not only enables you to confirm what the actual agreement was, but provides a written record to be retained in your filing system.

Management Tip 3: Telephone Calls

Before making the telephone call, write down:

- ☎ the aim of the call - what you want to achieve
- ☎ an agenda of points you need to make
- ☎ the questions you must ask

At the start of the call:

- ☎ always state your name
- ☎ ask if it is a convenient time to talk
- ☎ state clearly why you are calling

During the call:

- ☎ tick off the points on your agenda as they are dealt with
- ☎ check whether or not all of your points have been covered
- ☎ at the end, summarise what has been agreed during the call

Written Communication

Management writing is the main form of communication within and between organisations. The written word may be in the form of letters, faxes, e-mail, minutes, memoranda or reports. Because we write so much, it can be a time-consuming chore. However, writing a well-structured and easily comprehensible document is a satisfying and efficient use of your time. Documents convey information. Writing a document provides an opportunity to structure thoughts, clarifying the issues to both writer and reader. Unlike literature, management writing should get straight to the point, conveying only the significant information in as few words as possible. The following factors should always be considered when writing a document:

Objective - what is the aim of the document?

Audience - who is the document aimed at?

Structure - how can the information be presented clearly and concisely?

Draft & edit - does the document fulfil its aim clearly and concisely?

Objective

You must have a definite reason for writing the document, and then focus clearly on this aim. If you do not know why you are writing it, then you probably should not be doing so.

Audience

As well as being clear on your own aim in writing the document, you should also consider what the reader would like to achieve. If you get this right, then you will succeed in getting the reader's attention, and therefore in conveying your message. Ask yourself:

- | | | |
|---------------------------------|---|---------------------|
| ■ what do they already know? | ➡ | leave it out |
| ■ what background do they need? | ➡ | include it |
| ■ what do they want to know? | ➡ | emphasise it |

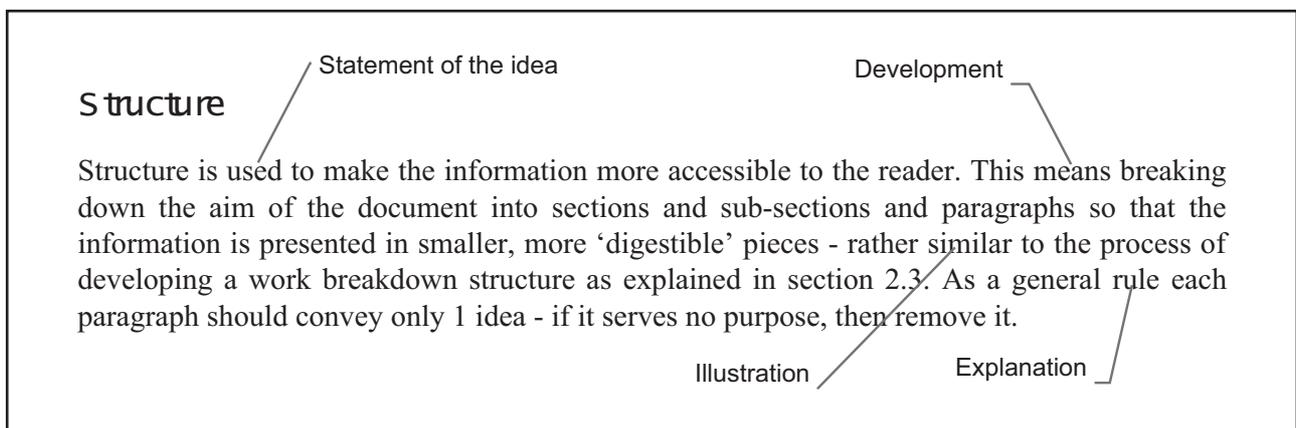
Structure

Structure is used to make the information more accessible to the reader. This means breaking down the aim of the document into sections, sub-sections and paragraphs so that the information is presented in smaller, more 'digestible' pieces - rather similar to the process of developing a work breakdown structure as explained in section 1.2. step 7. As a general rule each paragraph should convey only one idea - if it serves no purpose, then remove it. Where possible each paragraph should include:

- a **statement** of the idea
- a **development** of the idea
- an **explanation** of the idea and its context
- an **illustration or evidence** to support it

Figure 23 below illustrates good structure.

Figure 23: Structuring a Document



Draft and Edit

Whether you are writing a letter, memo or report, always prepare a first draft and then check this to see if it actually says what you want it to do. If the document is particularly important, ask a colleague to read it through, or leave it overnight so that you can look at it afresh the next day. If you are writing on behalf of others, check with them to ensure that you are truly representing their views. Other ideas to help you include:

- **Start well** - state the aim of the document right at the beginning
- **Layout** - make effective use of titles; white space; bullet points; etc.
- **Style** - keep sentences short and avoid jargon; if the document is unavoidably long, add an executive summary
- **Emphasis** - use **bold**, underline or *italics* to highlight important points
- **Diagrams** - use with care; make them simple and label them clearly
- **Check** - proof read for spelling mistakes and simple errors (do not just rely on the computer's spellcheck); read out loud to ensure that punctuation makes the document easier to read
- **End well** - summarise the key information you want to convey

Different Types of Documents

Listed below are the main types of documents, and the basic information that should always be included.

- | | |
|---------------|--|
| Fax | <ul style="list-style-type: none"> ■ name, title and organisation of sender ■ fax number of sender and date sent ■ name, title and organisation of receiver ■ subject name ■ number of pages included |
| E-mail | <ul style="list-style-type: none"> ■ name, title and organisation of sender ■ name, title and organisation of receiver ■ subject name ■ e-mail addresses and date are included automatically |
| Letter | <ul style="list-style-type: none"> ■ name, title and organisation of receiver ■ full postal address ■ date ■ subject name ■ name, title and organisation of sender |

- Report**
- Title
 - Date
 - Table of contents
 - List of acronyms
 - Name of author
 - Executive summary
 - Main body of text
 - Introduction
 - Conclusions
 - Recommendations

Appreciating Differences

If your ability to complete your tasks efficiently is described as your **job competence**, then your ability to relate effectively with other people in the process can be described as your **communication competence**. These two types of competence can be equated to the concepts of task management and process management. Appreciating differences between project partners, especially in different countries, is an important step in achieving an integration of these two competencies.

To ensure that your own communication competence is effective, try to remember the following tips:

- **Display respect** - if you are able, through gestures, eye contact, smiles and words of encouragement, to convey to your colleague that you are interested in their point of view, then they are much more likely to respond positively to what you have to say. Respect forms the basis for a sound working relationship.
- **Be non-judgmental** - if you find that you are being interrupted before you have finished saying something, or that the other person is shaking their head in disagreement while you are speaking, then you are less likely to achieve effective communication. When a person believes she has been fully listened to, she is generally more receptive to hearing reactions, whether they be positive or negative.
- **Recognise your views as your own** - people who assume that others share their point of view, and do not listen out for differences of opinion will find it more difficult to form productive working relationships. Starting your sentences with “I think...” or “My feeling is...” will help others see you as open-minded and sensitive. Keep in mind that your own beliefs, knowledge, and attitudes are the product of your own past experience.
- **Be sympathetic** - most people find it far easier to deal with individuals who seem to be able to understand things from their point of view. If you spend time trying to establish an understanding of the other persons point of view, and then reflect this understanding in your words and actions, then you will be able to communicate more effectively.

- **Be flexible** - whilst you shouldn't lose sight of the task in hand, you should also be aware of how people feel in the process. Being flexible means adapting your behaviour to the demands of the situation, and ensuring that people feel a part of the completed task or project, and have learned something in the process.
- **Take turns** - most people enjoy taking their turn in a discussion. This means that you should neither monopolise the conversation, nor avoid taking part. By taking part and taking turns, you indicate your interest in, and concern for, the other person.
- **Be tolerant of ambiguity** - in many cross-cultural exchanges, ambiguity is the most frustrating element. As you learn each others ways, so the ambiguities become less common, and the frustrations are forgotten; but if you expressed your frustration through hostility then this is less likely to be forgotten. Learning to manage the frustration associated with ambiguity is an important step in your adaptation to a new working environment.

Summary: Communication

- Effective communication is essential to successful project management. Wherever possible, communication should be planned, and the outcome verified and recorded on file.
- Oral communication is not just about speaking and listening; it is also about exerting control over the flow of conversation. When speaking:
 - be assertive
 - maintain control
 - use open questions
 - summarise the outcome
- When listening to a conversation or telephone call:
 - repeat what you have heard
 - record it
 - consider writing a letter or fax to confirm any agreements made
- Before finalising and sending a written document, you should always:
 - be clear on the objective of the document
 - identify its target audience and consider their information needs
 - map out the structure of the document
 - make a draft, and check it carefully for clarity, errors, and spelling mistakes

Chapter 2.3 Meetings

Meetings are a means of bringing together a team of people to pool their resources towards achievement of a common goal. This may be simply a five minute get-together to review progress against the week's scheduled tasks, or a major meeting between project partners to determine the main features of the next phase of the project. With good preparation and sound management, meetings can help save time, resolve problems, allocate responsibility and monitor progress. Unfortunately they can also be pointless, boring and inconvenient.

Deciding Whether to Go

It may seem a peculiar place to start, but the first step towards effective meetings is to ask yourself whether you should attend or not. Even if you scheduled the meeting yourself, it may be more appropriate to send a subordinate, or perhaps you should cancel it. If you have been invited, you may decide that your presence would be of no use - either to yourself or to those who invited you. Another scenario may be that you have been invited but are clear on why your presence is required. Whatever the reason, if you are unsure whether to attend or not, seek clarification of the meeting's purpose and the reason for your presence. You can then make an informed decision.

Preparing for a Meeting

Meetings should always be well-prepared. This means deciding what the agenda should be, who will participate, and how long the meeting should last. The necessary preparations are:

- make an agenda and circulate it in advance for comments
- decide who should attend
- schedule the duration of the meeting

Agenda

The agenda is a summary of what will take place during the meeting. A good agenda should state:

- the objective of the meeting
- the purpose of each section and the order in which they will be discussed
- the information requirements (if any) from each participant
- the venue, date and time of the meeting
- the list of participants invited

Aside from informing participants of the purpose of the meeting, developing the agenda forces you to justify the reasons for requesting the meeting; to think through what information will be required; and to identify what must be done before the meeting. If the meeting objective and section purposes are clearly stated, it also provides a basis for monitoring and recording progress during the meeting. When sent out in advance it provides participants with the opportunity to suggest revisions, as well as time to prepare their contributions.

Deciding who will participate

The larger the group, the less manageable it becomes, and the less likely it is that the meeting's objective will be achieved. By looking at the purpose of each section, try to invite only those who need to be involved - as information providers or as receivers; as decision-makers or decision-takers. If you are unsure, show the prospective participant the agenda, and ask the person whether he/she feels attendance is necessary.

A chairperson should be appointed from among the participants. Tips on being a successful chairperson can be found below. There is no definite rule on who should chair the meeting. Although it is often the most senior person present who is appointed, in fact this may not be appropriate. Whenever possible, the chair should be allocated to the most competent chairperson. You may know from bitter experience who should not chair the meeting!

Duration

The worst type of meetings never seem to end, with participants feeling trapped in the room. As the sense of boredom and frustration increases, so contributions become less and less useful, and discussion less focused. One way of avoiding such a situation is to make it clear the starting and finishing times of the meeting, how long each section should last, and stick to these times.

If discussions do go over time, draw the participants attention to this fact and try to speed up discussions. If issues arise which are not on the agenda, ask for them to be put aside for a future meeting, for which an appropriate agenda can be prepared.

Managing a Meeting

Whether you are chairing the meeting, managing from the sidelines, or just present as an invited participant, you have an important role in ensuring the meeting is conducted successfully. The first steps towards a successful meeting will have been taken during preparation. It is vitally important that these preparations are now put to good use - unfortunately, it is all too common for a well-prepared agenda to be ignored.

The keys to good meeting management are:

- effective chairing
- meaningful contributions
- efficient minutes

Chairing a meeting

The chairperson plays a particularly important role. Tips for good chairmanship can be found below, but even if you find yourself in a poorly-chaired meeting, there should still be an opportunity to influence the chances for success.

Management Tip 4: A Good Chairperson

Clarifies.....	☞ the purpose of the meeting; the time at which the meeting will finish; the house rules to be observed by all participants
Summarises.....	☞ progress after each stage; decisions which have been agreed; issues and disagreements for further discussion at subsequent meetings
Ensures that.....	☞ discussion remains focused on the stated objectives of the meeting; participants keep as close to the time schedule as possible; all participants have an opportunity to contribute or comment; disagreements do not turn into arguments

Making and responding to contributions

Meetings are highly structured conversations. It is important that contributions are clear and concise, and directly related to the issue under discussion. As with any oral communication, there are opportunities for ambiguity, misunderstanding and disagreement.

It is highly likely that you will have something to say during discussions as well, even if it is only to seek a clarification. (If not, then perhaps your decision to attend the meeting was wrong!) It is a good idea to note down relevant points in the discussion as they arise. Before you make your own contribution, think it through first and summarise it in bullet points. This will help you speak clearly and concisely, especially if you are nervous during important meetings.

There is also a skill in responding to the contributions of others. Some tips are summarised below.

Management Tip 5: Conduct During Meetings

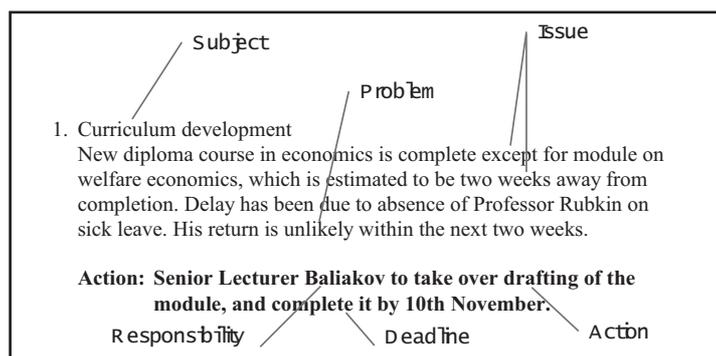
Don't...	Do...
<input checked="" type="checkbox"/> make people feel stupid by laughing at bad or impractical ideas	<input checked="" type="checkbox"/> treat a bad idea seriously, but state reasons why it should not be pursued further
<input checked="" type="checkbox"/> directly criticise any person for not completing a task	<input checked="" type="checkbox"/> make clear what needs to be done, and by when; or if a reprimand is necessary, wait until after the meeting
<input checked="" type="checkbox"/> ignore participants' contributions	<input checked="" type="checkbox"/> try to build on ideas expressed during the meeting, even if only indirectly - eg. "taking Sergie's earlier point, we could..."
<input checked="" type="checkbox"/> leave shy or unconfident participants to feel left out	<input checked="" type="checkbox"/> solicit their views directly, and support their contributions

Keeping Minutes

At the start of the meeting, one person should be appointed to keep a record of the meeting. The purpose of minutes is to record significant information, what decisions were made, and who was party to them. Often though, minutes are a verbatim account of what was said, with the result that they are overlong, do not highlight the important points, and are seldom read. A useful presentation format is sometimes described as *action minutes*, when only the following information is presented (as illustrated in figure 24):

- The **subject**
- A summary of the main **issues/problems** raised
- A summary of the **action required**
- The name of the **person responsible** for completing the action
- The **deadline** for completion

Figure 24: An Example of Action Minutes



Summary: Meetings

- The first step towards successful meetings is the decision whether to attend or not.
- For effective meeting preparation, you should:
 - prepare an agenda in advance, and circulate it
 - be careful to invite only those whose knowledge or expertise is directly relevant to the issues on the agenda
 - estimate how long the meeting will take, and give realistic start and finish times
- In a well-managed meeting, the chairperson will:
 - clarify the meeting purpose, scheduling, and house rules
 - summarise progress, decisions, issues and problems
 - ensure that discussions remain focused, democratic and even-tempered
- When attending a meeting, take notes of the key issues discussed. Before making your own contribution, summarise what you would like to say in a bullet point list.
- Use the *action minutes* format to ensure that a clear and concise record of discussions is maintained. This should include:
 - subject
 - issues/problems
 - action required
 - person responsible
 - deadline

These minutes can be used at the start of the next meeting to review action from the previous meeting.

Chapter 2.4 Time Management

Most of us have been through that last-minute rush to complete a report, or prepare for a meeting; or you may have experienced days when *'the time just disappeared'*. These are symptoms of poor time management which can lead to reduced work performance and stress. However, few people actually recognise the need to improve their own time management, feeling that just because they have an appointments diary they are somehow managing their time efficiently. In fact the causes of poor time management are more complex than the mere absence of an appointments diary.

Reasons for Poor Time Management

To improve your time management, the first step is to look at how well you are managing your time at present. See the self-study box below for instructions on how to measure your current performance.

Self-study Exercise 1: Keeping a work diary

Keep a note of how you spend your time at work for 2 or 3 days. Fill in a table like the one below. When you start an activity, record what it is and when you started. Then, whenever you change what you are doing - even if it is just having a cup of tea, or chatting to a colleague - record the finish time. You might want to add a comment to describe the activity further, to indicate who allocated the task to you, or to explain why you changed from the previous one.

Activity	Start	Finish	Comments

By keeping a record even for such a short time, you will achieve two things - firstly an indication of the efficiency and effectiveness of your current time management, and secondly a benchmark against which to measure your future time management.

There are three main causes of poor time management:

- poor task scheduling
- doing other people's work
- wasting time

Poor Task Scheduling

Deadlines can be daunting. You may worry whether you have left enough time to complete the task, or dread the usual last-minute panic to get things done. Briefly though, efficient scheduling of your tasks can be achieved by:

- checking on exactly what is required and by when
- breaking the task down into smaller sub-tasks allowing you to estimate better the time required, and to monitor progress
- building in reviews of your progress after completion of tasks or sub-tasks so that you can respond more quickly to delays

Having impossible deadlines imposed by your superiors or project partners can be particularly difficult. By scheduling the work effectively though, you are able at an early stage to: i) determine the feasibility of doing the job in the time available; ii) ask for more assistance or resources; iii) ask for the deadline to be extended; iv) redefine the task to match it to the time available; or v) at least make clear that the chances for meeting the deadline are slim.

Doing Other People's Work

There are a number of reasons which cause you to do other people's work - maybe you would rather redraft a poorly worded letter prepared by a junior colleague than ask him to redo it; perhaps your manager gave you a task which was not explained well enough, so you spend time working out what you are supposed to be doing; or perhaps you would simply like to help your colleagues with their work. Whatever the reason, this is inappropriate task allocation. Check your work log to see how much time you spent doing other people's work. Have a look at your job description to see if you are doing what you are supposed to do. If this is a problem, think about ways in which you can minimise it - for example, assign secretarial duties to the secretary; explain to your subordinate how you want the letter rewritten; seek clarification from your manager as to exactly what she would like you to do.

Time wasting

There are a number of common causes of time wastage:

- **Socialising** - telephone calls, conversations with office colleagues, popping out for a snack. Although non-work related activities can provide a well-earned break, it is important not to allow yourself to be diverted from important tasks such as the next deadline. Consult your work log to see if this is a problem for you.

- **Start-up** - it can often take time to switch from one task to the next, perhaps to physically retrieve the appropriate file, or just to mentally 'change gear'. Try to tackle a few tasks for a long time rather than a lot of tasks for a short time. Other tips include: grouping similar tasks together (eg. sending faxes); or putting interruptions into the pending tray rather than allowing them to disrupt your current task. Use your work log to identify which short tasks could be grouped together.
- **Enjoyable tasks** - we often spend longer than we need on a task because we are enjoying it. This may be making a letter or a fax look perfect, or tidying up the stationery cupboard. To avoid doing this, allocate time realistically to the task before you start, and then keep to the deadline.
- **Unpleasant tasks** - conversely, you may find yourself delaying an unpleasant activity by time-filling - perhaps on a more enjoyable task. Check your work log to see if any tasks are being delayed just because they are dull or difficult.

Improving Your Time Management

To improve your time management, you must undertake a quick review of your current performance. Having maintained a work diary for a few days, you should be in a position to look critically at how you spend your time, and to reallocate your time more efficiently and effectively. The necessary steps to achieve improved time management are:

- Determine work objectives
- Match time to tasks
- Review technique

Work Objectives

You should have a job description, or terms of reference for your job. These should be your starting point to clarify your work objectives - what you are being paid to do. If you do not have a job description or any terms of reference, ask for some and discuss with your manager. As a last resort, ask yourself what you do that needs to be done but nobody else does.

Once you have listed your functions, try and prioritise them. First group together the functions which you consider are most important; then group those which are least important. Those that remain should be of middling importance. If you are unsure about your prioritisation, ask your colleagues.

Match Time to Tasks

Now that you are clearer on your work objectives and priorities, look again at your work diary. Try and link each task to a function. Look for unimportant tasks on which you are spending a lot of time; and for important tasks on which you are spending little time. Decide what time each task is worth in terms of your functions, and allocate an appropriate amount of time accordingly. Although this sounds difficult, by re-appraising your work you are sure to find some ways of saving time for re-allocation to more important tasks, including those which you may have neglected up until now. There may even be tasks which are not related to any of your functions, in which case you should consider how to drop them. When you are confident on how your time should be allocated, spend five minutes each morning to plan the day; fifteen minutes each Monday to plan the week; and an hour to plan the strategy for each month.

Review technique

For the tasks that remain on your list, you may find time savings by considering different ways of doing the same work - for example, if you find that you open and distribute mail two or three times a day, reduce this to once only and spend the time saved on more important tasks. If you have difficulty in thinking of new techniques, ask your colleagues; they may have some bright ideas.

Summary - Time Management

- Few managers and administrators recognise poor time management as a problem even though it leads to reduced work performance and stress

- The main causes of poor time management are:
 - wasting time
 - doing other people's work
 - poor task allocation and scheduling

- The first step in identifying whether time management is a problem is to maintain a work diary for a few days

- Improved time management can be achieved by:
 - determining work objectives and compare with work diary
 - reallocating time to tasks according to identified priorities
 - reviewing techniques for undertaking necessary tasks

- To sustain improvements in time management spend:
 - 5 minutes each morning to plan the day
 - 15 minutes every Monday to plan the week
 - 1 hour each month to plan strategy

Glossary

Activities	The specific tasks undertaken during a project as a result of applying means or inputs.
Activity Schedule	A method of presenting the activities of a project which identifies their logical sequence and any dependencies that exist between activities. A Gantt chart is the most commonly used tool. This is a graphic representation similar to a bar chart, setting out the timing, sequence and duration of project activities.
Accountability	Responsibility. It identifies the particular person who has to satisfactorily complete specific activities or tasks.
Appraisal	Analysis of a proposed project to determine its merit and acceptability in accordance with established criteria. This is the final step before a project is agreed for financing. It checks that the project is feasible against the situation on the ground, that the objectives remain appropriate and that costs are reasonable.
Bottom-up	Term used to describe decision making or development process starting with the beneficiaries as opposed to the donor agency or senior management.
Capital costs	Purchase price or initial costs of buildings, plant, equipment and machinery.
Contract	Legal agreement between two parties, in the case of Tempus between the contracting authority and a contractor. Contracts include general conditions and special. Contracts are for a fixed term.
Contractor	The public or private organisation, consortium or individual with whom the contracting authority enters into a contract. The firm, individual or consortium to which a contract is awarded (in Tempus mainly Universities)
Cost schedule	The costs applied to an activity schedule (see above)
Delegation	The diplomatic office representing the European Commission accredited to countries or international institutions at the level of an Embassy. The head of Delegation is often called Delegate or Ambassador.

DG XXII	The Directorate General (DG) of the European Commission dealing with Education, Training and Youth. DG XXII is also in charge of the Tempus programme. Technical assistance for the implementation of Tempus is provided to DGXXII by the ETF (see also European Training Foundation).
European Commission	The executive arm of the European Union. It initiates European Union policy and is responsible for implementing policy decisions taken by the Council of the European Union. The European Commission is responsible on behalf of the European Union for the ongoing management of the Phare and Tacis Programme, including overall direction and implementation. It acts as contracting authority for the award of Phare and Tacis contracts.
European Training Foundation	The European Training Foundation is an agency of the European Union which works in the field of vocational education and training in Central and Eastern Europe, the New Independent States and Mongolia. The Foundation also provides technical assistance to the European Commission for the Tempus Programme.
Evaluation	(a) A periodic assessment of the relevance, performance, efficiency and impact of a project in the context of stated objectives. It is undertaken as an independent objective examination (which in the case of Tacis takes place after the project(s) has ended) of the background, objectives, results, activities and means deployed, with a view to drawing lessons that may be more widely applicable.(b) an examination of tenders to judge the most economically advantageous offer
External Monitor	The consultant undertaking monitoring of projects on behalf of Tacis services.
Gantt Chart	A method of presenting information graphically, often used for activity scheduling. Similar to a bar chart. (see Activity Schedule).
Goal	The wider objective to which a project contributes, usually specified at the sectoral or national level.
Hierarchy of objectives	Activities, outcomes, specific objectives, overall objectives as specified in the intervention logic.
Human resources management	The management of people, usually in terms of the staff of projects.

Indicators	<p><i>Key indicator:</i> The main or most important indicators which show whether or not objectives have been achieved at each level of the logframe hierarchy.</p> <p><i>Process indicators</i> show whether planned activities were carried out (sometimes referred to as milestones).</p> <p><i>Impact indicators</i> show whether progress is being made towards achievement of project objectives.</p>
Inputs	The resources (financial, physical and human) used in carrying out the activities of a project.
Intervention Logic	The strategy underlying the project. It is the narrative description of the project at each of the four levels of the 'hierarchy of objectives' used in the logframe.
Know-how	Professional experience (technical knowledge) and expertise in the broadest sense, coming from a wide range of public and private organisations in the European Union or the partner countries. The Tacis Programme provides grant finance for the provision of the know-how. Know-how is delivered by providing policy advice, consultancy teams, studies and training, by developing and reforming legal and regulatory frameworks, institutions and organisations, and by setting up partnerships, networks, twinings and pilot projects.
Logframe	The matrix in which a project's intervention logic, assumptions, objectively verifiable indicators and means of verification are presented. An abbreviation of logical framework approach.
Logical Framework Approach	A methodology for planning, implementation and evaluation of programmes and projects, involving problem, objective and strategy analysis, , with activity and resource scheduling. (Also LFA.) This can be summarised in a one page logframe.
Lump sum	In cost tables where an item comprises a number of small items whose costs are difficult to identify, the cost is aggregated to a 'lump sum'.
Main Implementation	The main period of project implementation which follows inception and precedes handover.
Means	See inputs
Means of Verification	The means by which the indicators or milestones will be recorded and made available to project management or those evaluating project performance.

Milestone	A type of indicator for short-term objectives which facilitate measurement of achievements throughout a project rather than just at the end. They also indicate times when decisions can be made. See indicators (process).
Monitoring	Monitoring is a continuous assessment of project implementation in relation to agreed schedules, and the use of inputs, infrastructure, and services by project beneficiaries. In the context of the Tacis and Phare Programmes, monitoring is the regular overview of projects by specifically employed personnel who provide information based upon the agreed project planning and reporting documentation, for project management and other interested parties. This is to ascertain whether or not projects are on course and signal early warning of potential problems to allow adjustments to be made with minimal disruption. The immediate objective of monitoring is to provide a regular reporting mechanism to the sectors, independent of contractors or other outside bodies, to enable more focused project management decisions to be reached to ensure that a project remains on course.
Narrative	The first column in a logframe matrix used to describe the overall objective, specific objective(s), outcomes and activities of a project.
Objective	Description of the aim of a project or programme. In its generic sense it refers to activities, outcomes, specific objectives, overall objectives and goals.
Objective-oriented planning	Setting objectives in order that you can work out a plan of action to achieve these objectives.
Objective Tree	A diagrammatic representation of the proposed project interventions planned logically, following a problem analysis, showing proposed means, resources and ends.
Operating costs	(or recurrent costs) Costs which are incurred for operation and maintenance which will continue to be incurred after the implementation period of the project has ended.
Outcomes	The outputs produced by undertaking a series of activities. The results are what the project will have achieved by its completion date.
Overall objectives	Objectives in the wider sectoral and national sector, to which the project is designed to contribute
Partner Countries or states	Tacis partner countries include the New Independent States of the former Soviet Union (less the Baltic States) and Mongolia. Phare partner countries include the Baltic States, Bulgaria, the Czech Republic, Hungary, Poland, Romania, Slovenia and the Slovak Republic.

Phare Programme	The Phare programme is a European Union initiative which aims to help the countries of Central and Eastern Europe rejoin the mainstream of European development and build closer political and economic ties with the European Union. It does this by providing grant finance to support the process of economic transformation and to strengthen newly created democratic societies.
Problem Analysis	A structured investigation of the negative aspects of a situation in order to establish causes and their effects. It is undertaken prior to designing an objective tree.
Programme	A series of projects or activities with a global objective.
Progress Report	An interim report on progress of work on a project submitted by the contractor to the partner organisation and the Commission within a specific time frame. It includes sections on technical and financial performance. It is usually submitted quarterly.
Project	A series of activities designed to produce a specific result within a limited time frame. Terms of Reference set the objectives and parameters, and the work is implemented under contract.
Project Cycle	The process which starts by determining reform priorities, through to subsequent programming, project development, implementation and evaluation.
Project Cycle Management	A methodology for planning, implementation and evaluation of projects and programmes based on the logical framework approach. Two key features are its focus on project beneficiaries and its integrated approach to documentation.
Project Elements	The different levels of objective which make up the project's intervention logic - overall objectives; specific objectives; outcomes; activities.
Recurrent Costs	See operating costs.
Resource Schedule	The project budget.
Specific Objectives	The central objectives of the project in terms of sustainable benefits to be delivered to the project beneficiaries. It does not refer to the services provided by the project (these are results), but to the utilisation of these services by project beneficiaries.
Stakeholders	Stakeholders are people, groups or institutions with interests in a project.

Strategy	A strategy is a plan of action which sets out the course and direction that an organisation will take. It involves statements about the goals and objectives of the organisation to which assistance will be provided, and how such assistance will be provided.
Sustainability	A project can be said to be sustainable when it continues to deliver benefits for an extended period after the main part of the external assistance has been completed.
Tacis Programme	The Tacis Programme is a European Initiative which provides grant finance for know-how to foster the development of market economies and democratic societies in the New Independent States and Mongolia.
Technical Assistance	Specialists, consultants, trainers, advisers etc. contracted for the transfer of know-how and skills and the creation and strengthening of institutions. The term 'technical assistance' does not accurately describe the process of the transfer of know-how to the NIS, which is a collaboration between specialists.
Tempus	Tempus is a framework programme designed to stimulate cooperation between higher education institutions in East and West, with the aim of supporting the reform of the higher education systems in Central and Eastern Europe (Tempus Phare) and the New Independent States and Mongolia (Tempus Tacis). See also 'What is Tempus'
Terms of Reference (TOR)	Terms of Reference define the tasks required of the contractor and indicate project background and objectives, planned activities, expected inputs and outputs, budget, timetables and job descriptions.
Workplan	The schedule which sets out the activities and resources necessary to achieve a project's results and purpose.

Useful References

Project Cycle Management: Integrated Approach and Logical Framework

European Commission, DGVIII, Evaluation Unit, 1993 (available in English, French and Russian)

The Logical Framework Approach (LFA) - A Handbook for Objective-Oriented Planning

NORAD (Norwegian Agency for Development Cooperation), July 1996

LFA - a flexible tool for participatory development

Danida (Danish Agency for International Development Cooperation), February 1996

Guidelines for the Application of LFA in Project Cycle Management

SIDA (Swedish International Development Agency), Methods and Institutional Development Unit, March 1996

Project Cycle Management (PCM) and Objectives-Oriented Project Planning (ZOPP) - Guidelines

Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ), 1996

Where to get further information on Tempus

More information can be obtained from the National Contact Points, the National Tempus Offices, the Tempus Tacis Information Points, the Tacis Coordination Units or the European Commission (DG XXII) and the European Training Foundation.

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Tempus Publications currently available

Guide for Applicants (Phare) - containing the annually reviewed national priorities as well as all other information required for the submission of project proposals.

Guide for Applicants (Tacis) - containing all the information required for the submission of project proposals.

Tempus Annual Report - containing background and statistical information on Tempus in the Phare and Tacis region.

Tempus Phare Compendium - containing basic information on all projects currently in operation in the Phare region.

Tempus Tacis Compendium - containing basic information on all projects currently in operation in the Tacis region.

Tempus Country Monographs - containing background information on the activities and impact of Tempus for a given country (only available for Bulgaria, the Czech Republic, Hungary, Poland, Romania, the Slovak Republic and Slovenia).

Tempus at Work - a collection of double-sided country sheets with information about the operations of Tempus in individual Phare and Tacis countries as well as the contribution of individual EU countries to the programme.

TOP Studies - a series of five studies measuring the impact Tempus Phare has had in certain fields. The titles available are: "Tempus Student Mobility", "The impact of Tempus on National Reform", "Tempus Contribution to University-Enterprise Co-operation", "Mutual benefits of Tempus project partnerships" and "Impact of Tempus on Institutional Management".

Tempus Tacis Project Management Handbook - containing information on how to run a Tempus Tacis Project

Apart from the Country Monographs, all of these documents are available on World Wide Web and can be downloaded at the following address: <http://www.etf.eu.int>. Upon request, they may also be obtained via e-mail (info@etf.eu.int) or on paper.

