LIFECED - Lifelong and Cultural Inclusive Education on the Romanian-Ukrainian Border
cod ROUA00256

PROJECT MANAGEMENT

TRAINING MANUAL

- Summary –

Trainer: Assoc. Prof. PhD Carmen Chasovschi

Topic: Project Management – Project Cycle Management, Project Design, Planning, Implementation, Monitoring and Evaluation

Total Duration: 60 hours (Theory: **10 hours** / Practice: **18 hours** / Evaluation: **2 hours** / Self-study: **30 hours**)

Course Objectives

General objective

To equip participants with the knowledge, analytical frameworks and practical competencies required to identify, design, plan, implement, monitor and report projects using Project Cycle Management (PCM) principles and contemporary project-management tools. The course places particular emphasis on needs-based project generation, stakeholder participation, intervention logic, results orientation, scheduling, human-resource planning, budgeting, procurement, reporting and the practical use of Microsoft Project.

In the short term, participants will be able to transform a documented need or organisational challenge into a coherent project concept and develop its main planning components. In the longer term, the course aims to strengthen participants' capacity to manage projects in a structured, accountable and results-oriented manner, including projects financed through European and international programmes.

Specific objectives

- Understand the defining characteristics of projects and the principles and phases of Project Cycle Management.
- Generate project ideas on the basis of evidence, needs analysis, SWOT analysis and structured brainstorming.
- Conduct stakeholder analysis and formulate a coherent Problem Tree and Objectives Tree.
- Formulate SMART objectives and construct a consistent intervention logic linking activities, outputs, outcomes and impact.
- Develop measurable indicators with baselines, targets and sources of verification.
- Translate project logic into a Work Breakdown Structure (WBS), GANTT chart, milestones and task dependencies.
- Define project roles, responsibilities and human-resource requirements, including the use of responsibility matrices.
- Prepare an activity-based budget and understand essential financial-management principles.
- Apply basic procurement principles and understand the relationship between implementation evidence, monitoring and reporting.
- Use Microsoft Project to create a schedule, dependencies, milestones and resource assignments.
- Integrate the main project components into a coherent mini-project proposal.

Specific Competencies Acquired

Upon completion of this course, participants will be able to:

Competency Type	**Detailed Description**
Professional Competencies	- Apply PCM principles across identification, formulation, planning, implementation, monitoring and evaluation. - Diagnose needs and contextual conditions using needs assessment, SWOT analysis and evidence-based problem identification. - Map stakeholders according to interests, influence/power, expected contribution, risks and engagement needs. - Construct Problem Trees and Objectives Trees and validate cause-effect and means-ends relationships. - Formulate SMART objectives and design a coherent results chain: inputs → activities → outputs → outcomes → impact. - Develop indicators, baselines, targets and sources of verification suitable for project monitoring. - Develop WBS structures, GANTT schedules, milestones, dependencies and realistic implementation sequences. - Plan human resources, project roles, responsibilities, communication and accountability using tools such as RACI. - Prepare simplified project budgets and apply basic principles of financial control and variance monitoring. - Apply fundamental procurement principles: transparency, equal treatment, proportionality, competition, value for money and documentation. - Prepare concise progress-reporting structures linking activities, results, indicators, expenditure, deviations and corrective action. - Use Microsoft Project for task scheduling, dependencies, milestones, resource allocation and schedule review.
Transversal Competencies	- Critical and systems thinking — analysing causal relationships and testing the coherence of proposed interventions. - Collaborative problem-solving — developing project components in teams and integrating different stakeholder perspectives.

Competency Type	Detailed Description
	- Evidence-based decision-making — distinguishing assumptions from evidence and using data to justify project choices. - Communication and facilitation — presenting project logic clearly and providing constructive peer feedback. - Planning and organisational competence — sequencing work, allocating responsibilities and managing constraints. - Ethical and accountable project practice — considering transparency, participation, responsible resource use and sustainability.

Course Learning Outcomes

- Explain the principles and phases of Project Cycle Management and distinguish projects from routine operations.
- Generate project ideas from documented needs, weaknesses, opportunities and stakeholder priorities.
- Conduct SWOT, stakeholder and problem analyses and build Problem and Objectives Trees.
- Formulate SMART objectives and construct a coherent intervention logic.
- Define results, indicators, baselines, targets, sources of verification and assumptions.
- Develop WBS structures, GANTT schedules, milestones and dependencies.
- Plan project roles, responsibilities and human-resource requirements.
- Prepare activity-based budgets and understand financial-control principles.
- Apply basic procurement, monitoring and reporting principles.
- Use Microsoft Project to develop and review a project schedule.

Course component	Hours
Theory	10
Practical applications	20
Individual study	30
Total workload	60
Primary methodological basis European Commission Project Cycle Management Guidelines and Logical Framework Approach, as used throughout the full Course Notes.	

Overview Table

#	Module	Theory (h)	Practice (h)	Total (h)
M1	Project Management & PCM Fundamentals; Project Idea Generation	1.5	2.5	4
M2	Needs Analysis, SWOT, Stakeholder Analysis & Problem Analysis	2	4	6
M3	Objectives Tree, SMART Objectives & Project Design	1.5	2.5	4
M4	Project Logic, Results, Indicators & Logical Framework Thinking	1.5	4.5	6
M5	WBS, GANTT, Scheduling & Human Resource Management	1.5	2.5	4
M6	Budget, Financial Management, Procurement, Reporting & Microsoft Project	2	4	6
—	TOTAL	10	20	30

MODULE 1. Project Management, PCM Fundamentals and Project Idea Generation

📖 Theoretical Foundations

Project management is the disciplined process through which that change is organised. It involves making choices about objectives, scope, stakeholders, activities, time, resources, quality, risks, communication and accountability. Contemporary standards increasingly emphasise that successful project management is not only about delivering outputs. It is about enabling outcomes and value. PMI's principle-based approach, for example, stresses value delivery, stakeholder engagement, systems thinking, tailoring and adaptability (PMI, 2021; PMI, 2025).

In EU-funded and development-oriented interventions, the project must also be understood in relation to wider policies, programmes and strategies. A project is rarely an isolated technical exercise. It is normally one contribution to broader institutional or societal objectives. This is why PCM begins with context, policy and stakeholder needs rather than with a list of activities.

The cycle perspective is important because decisions taken early influence everything that follows. Weak identification produces weak formulation; vague objectives make monitoring difficult; poor stakeholder analysis creates implementation resistance; unrealistic budgets undermine delivery. PCM therefore encourages progressive decision-making: at each stage, information is analysed and the intervention is refined before additional resources are committed.

Although terminology varies across programmes, the logic normally includes programming/context analysis, identification, formulation, implementation and monitoring, and evaluation/learning. Evaluation then informs future programming and identification, making the cycle iterative rather than linear.

PCM stage	Key management question	Typical output
Programming / context	What priorities and problems matter?	Policy/context priorities
Identification	Which intervention ideas are relevant?	Project concept / preferred strategy
Formulation	Is the project feasible and well designed?	Full design, logframe, work plan, budget
Implementation & monitoring	Are activities and results progressing as planned?	Outputs, monitoring data, corrective actions
Evaluation & learning	What worked, why, for whom, and will benefits last?	Findings, lessons and recommendations

Project idea generation is the transition from analysis to possible intervention. A credible project idea can emerge from several sources: a documented unmet need, a persistent organisational weakness, a policy priority, a stakeholder demand, a market or technological opportunity, an evaluation recommendation, or a combination of these.

Needs-based idea generation asks what gap exists between the current and desired situation. SWOT-based idea generation examines whether internal weaknesses should be reduced, strengths mobilised, external opportunities captured or threats mitigated. Brainstorming then expands the solution space. The analytical tools identify where intervention may be justified; brainstorming helps generate alternative ways of responding.

A project idea becomes a preliminary concept when it can answer six questions with reasonable clarity: What is the problem? Who experiences it? What evidence shows that it matters? What change is desired? What broad intervention could contribute to that change? Why is the organisation or partnership capable of contributing?

At this stage, precision is more valuable than detail. The objective is not to write a full proposal. The objective is to decide whether the idea deserves further analysis. A useful concept statement is short enough to challenge. If the team cannot explain the need and intended change in a few sentences, the idea is probably still too vague.

Key Concepts to Remember

Core Takeaway: A project is a temporary, change-oriented intervention with defined objectives, scope, time and resource constraints.

- PCM links context, identification, formulation, implementation/monitoring and evaluation/learning.
- Relevance, feasibility and sustainability are core quality tests.
- Stakeholder participation strengthens ownership and implementation quality.
- Project ideas should originate in demonstrated needs rather than pre-selected activities.

Practical Activities & Exercises

Analyze the current situation in your area. Please Identify some Positive and Negative Points.

Self-Assessment & Reflection

1. What distinguishes a project from routine operations?

2. Why does PCM begin with analysis rather than activities?

3. Which PCM stage tests whether a project is feasible and well designed?

4. How do relevance, feasibility and sustainability function as quality criteria?

5. Reflection: Is your selected project idea driven by a demonstrated need or by an activity your organisation already wants to deliver?

Module Glossary

Project: A temporary, purposeful intervention designed to produce a defined result or change.

Project Management: Coordinated application of knowledge, methods, tools and resources to achieve project objectives.

PCM: Project Cycle Management; a structured approach covering the full project cycle.

Relevance: The extent to which project objectives and design respond to needs, priorities and context.

Feasibility: The extent to which the project can realistically be implemented with available resources, time and capacities.

Sustainability: The likelihood that benefits or value will continue beyond the funded intervention.

MODULE 2. Needs Analysis, SWOT, Stakeholder Analysis and Problem Analysis

📖 Theoretical Foundations

2.1 Needs Analysis

Needs analysis establishes the factual and interpretive foundation of a project. A need is not simply a complaint or a desired activity. It is a significant gap between an existing condition and a desirable or acceptable condition. Needs may be normative (compared with a standard), expressed (articulated by stakeholders), comparative (identified by differences between groups or territories) or anticipatory (linked to emerging change).

The PCM perspective requires analysis to focus on the people, organisations and systems affected by the problem. Evidence may include statistics, administrative data, surveys, interviews, focus groups, observation, previous evaluations, policy documents and stakeholder consultation. Triangulation is important: no single source should automatically be treated as complete.

2.2 Target Groups and Beneficiaries

PCM distinguishes between stakeholders and the groups expected to benefit from the intervention. A target group should be described sufficiently to support design decisions. Useful descriptors include size, location, demographic or organisational characteristics, current situation, specific barriers, capacities and relationship to the identified problem.

2.3 SWOT Analysis

SWOT is a strategic diagnostic tool that separates internal factors from external conditions. Strengths and weaknesses refer to internal capacities or limitations that the organisation or partnership can influence relatively directly. Opportunities and threats arise primarily from the external environment.

2.4 Stakeholder Analysis

Stakeholders are individuals, groups or organisations that can affect the project, be affected by it, or perceive themselves as affected. Stakeholder analysis is not a communication list. It is a structured assessment of interests, influence, capacities, potential benefits, possible losses, relationships and appropriate engagement.

2.5 Problem Analysis and the Problem Tree

Problem analysis is one of the central analytical steps in the Logical Framework Approach. The team identifies the negative aspects of an existing situation and establishes cause-effect relationships. The output is a Problem Tree: a visual model with a core problem, causes below it and effects above it.

The core problem should describe an existing negative situation, not an absence of a preferred solution. 'There is no training centre' is usually a weak problem statement because it assumes the solution. 'Low access to relevant vocational training among rural youth' describes the condition that requires explanation. Causes can then be investigated: distance, cost, curriculum mismatch, information gaps, employer disengagement, digital barriers and so on.

💡 Key Concepts to Remember

Core Takeaway: Needs analysis compares the current situation with a desired situation and must be supported by evidence.

- Target groups should be explicitly characterised and, wherever possible, numerically estimated.
- SWOT distinguishes internal strengths/weaknesses from external opportunities/threats.
- Stakeholder analysis examines interests, influence, contribution, resistance and engagement needs.
- A Problem Tree maps causes → core problem → effects and should describe existing negative conditions, not disguised solutions.

📝 Self-Assessment & Reflection

1. What is the difference between a need, a problem and a solution?
2. How do internal and external factors differ in SWOT?
3. Why should target groups be quantified and characterised?
4. What makes stakeholder analysis useful for design rather than merely descriptive?
5. What is wrong with formulating “lack of training” as a core problem?

🔍 Module Glossary

Need: A documented gap between the current and desired situation.

Target Group: Specific individuals, organisations or entities directly engaged by the project and receiving immediate support or services.

Final Beneficiaries: Wider groups experiencing medium- or long-term benefits from project success.

SWOT: Framework distinguishing internal strengths/weaknesses and external opportunities/threats.

Stakeholder: An actor that can affect or be affected by the project.

Problem Tree: A visual cause-effect analysis of a core problem, its causes and effects.

MODULE 3. Objectives Tree, SMART Objectives and Project Design

📖 Theoretical Foundations

3.1 From Problems to Objectives

Objectives analysis converts the negative conditions in the Problem Tree into desirable, realistically achievable future conditions. The resulting Objectives Tree expresses a means-ends relationship. Lower-level conditions function as means that contribute to higher-level ends.

The transformation is not mechanical. Some problems may not have a meaningful positive equivalent, some objectives may be unrealistic, and new objectives may need to be added if they are necessary for the logic. The team should therefore review the Objectives Tree as a new analytical model rather than simply changing negative words into positive words.

3.2 Strategy Analysis and Project Scope

An Objectives Tree often contains more change than one project can deliver. Strategy analysis is the process of selecting which branches will be addressed. Selection criteria may include relevance to target groups, alignment with policy, organisational mandate, comparative advantage, cost, technical feasibility, expected impact, stakeholder support, risk and complementarity with other interventions.

3.3 Objectives Hierarchy

A project normally contains different levels of objectives and results. Terminology varies by donor, but the conceptual distinction matters. The overall objective or impact level describes the broader long-term change to which the project contributes. The specific objective or outcome level describes the principal change expected among target groups, institutions or systems as a consequence of using project outputs. Outputs are the direct products and services delivered by the project. Activities are the actions undertaken to produce those outputs.

3.4 SMART Objectives

SMART is a practical quality test for objectives. Specific means that the intended change and target group are clear. Measurable means that progress can be assessed through evidence. Achievable means that the objective is plausible within the intervention's influence and resources. Relevant means that it responds to the identified problem and strategic context. Time-bound means that the expected achievement has a defined timeframe.

💡 Key Concepts to Remember

Core Takeaway: The Objectives Tree converts problem statements into desirable future conditions and tests means-ends relationships.

- Strategy selection defines which branches of the Objectives Tree fall within project scope.
- Objectives describe intended change; activities describe what the project will do.
- SMART objectives are Specific, Measurable, Achievable, Relevant and Time-bound.
- A strong project objective specifies the intended change, target group, scale or target, and timeframe.

📝 Self-Assessment & Reflection

1. How is an Objectives Tree derived from a Problem Tree?

2. What does means-ends logic test?

3. Why is strategy selection necessary before finalising project scope?

4. What are the five SMART criteria?

5. Rewrite one activity statement from your project as a SMART change objective.

🔍 Module Glossary

Objectives Tree: A visual representation of desired future conditions linked through means-ends logic.

Means-Ends Logic: Relationship showing how lower-level objectives contribute to higher-level objectives.

Strategy Selection: Choice of the objective branches that the project will address.

SMART Objective: An objective that is Specific, Measurable, Achievable, Relevant and Time-bound.

Scope: The boundaries of what the project will and will not address.

MODULE 4. Project Logic, Results, Indicators and Logical Framework Thinking

📖 Theoretical Foundations

4.1 The Logical Framework Approach

The Logical Framework Approach is a structured methodology for analysing and designing interventions. The European Commission describes it as an aid to thinking: it helps organise information, ask important questions, identify weaknesses and improve understanding of project rationale, objectives and means of achievement (European Commission, 2004). The matrix is the summary product of the approach, not the approach itself.

4.2 Results Chain

A results chain makes explicit how resources and actions are expected to produce change. Inputs are resources. Activities are actions. Outputs are the direct deliverables under project control. Outcomes are changes in behaviour, practice, capacity, access, performance or institutional condition resulting from the use of outputs. Impact refers to broader, longer-term effects.

4.3 Indicators

An indicator is a quantitative or qualitative variable used to measure progress or achievement. Indicators do not replace objectives; they operationalise them. A good indicator should be relevant to the result, clearly defined, feasible to collect, sensitive to change and sufficiently precise to support management decisions.

4.4 Baselines, Targets and Sources of Verification

Sources of verification identify where evidence will come from and how it will be collected. They should be feasible and proportionate. If an indicator requires expensive data that the project cannot obtain, the indicator is poorly designed. Sources may include attendance records, tests, administrative databases, surveys, system logs, observation checklists, financial records or independent assessments.

4.5 Assumptions and External Factors

Projects operate in open systems. Not every condition required for success is under project control. Assumptions are external conditions that are important to the causal logic but are not directly controlled by the project. For example, training may improve employability only if employers have vacancies and recognise the acquired competence.

4.6 Vertical and Horizontal Logic

Vertical logic asks whether the causal sequence is plausible. Are the planned activities sufficient to produce outputs? Are the outputs likely to enable the intended outcome? Are important

external conditions recognised? Horizontal logic asks whether each result can be measured and verified. Are indicators valid? Are sources feasible? Are targets credible?

A strong logical framework should survive both tests. If the causal logic is weak, better indicators will not rescue the project. If measurement is weak, even a plausible intervention will be difficult to manage and evaluate.

💡 Key Concepts to Remember

Core Takeaway: The Logical Framework Approach is an analytical process; the matrix is its summary product.

- The results chain links inputs → activities → outputs → outcomes → impact.
- Indicators operationalise results and require baselines, targets and feasible verification sources.
- Assumptions are external conditions required for causal logic to hold.
- Vertical logic tests causality; horizontal logic tests measurability and evidence.

📝 Self-Assessment & Reflection

1. What is the difference between an activity, output, outcome and impact?

2. Why are baselines necessary?

3. What is the difference between an indicator and a target?

4. How are assumptions connected to risk?

5. What is vertical logic in a logframe, and what is horizontal logic?

🔍 Module Glossary

Input: Financial, human, material or informational resources used by the project.

Activity: An action undertaken to transform inputs into outputs.

Output: A direct product, service or capacity generated by project activities.

Outcome: A change resulting from the use or uptake of outputs.

Impact: Broader longer-term effect to which the project contributes.

Indicator: A quantitative or qualitative variable used to measure progress or achievement.

Baseline: The initial value of an indicator.

Target: The expected indicator value by a defined time.

Assumption: An external condition necessary for the causal logic but not fully controlled by the project.

Logical Framework Approach: Structured analytical and planning methodology used to design, monitor and evaluate interventions.

MODULE 5. Project planning and sheduling: Work Breakdown Structure, GANTT. Human Resource Management

📖 Theoretical Foundations

5.1 From Results to Work Packages and Activities

Once the intervention logic is credible, the project must be translated into executable work. The Work Breakdown Structure (WBS) decomposes project scope into progressively smaller components. A results-oriented WBS may begin with outputs or work packages and then identify activities and tasks required to deliver them.

5.2 Scheduling Logic

Scheduling converts the WBS into time. For each activity, the team estimates duration, defines sequencing and identifies dependencies. Common dependency logic includes finish-to-start (one task must finish before another starts), start-to-start, finish-to-finish and, less commonly, start-to-finish.

5.3 GANTT Chart

The GANTT chart presents activities against a timeline and allows managers to see duration, overlap, sequencing and milestones. It is especially useful for communicating the work plan to stakeholders and for comparing planned and actual progress.

5.4 Human Resource Management in Projects

Projects require temporary coordination across roles, expertise and organisational boundaries. Human Resource Management in projects therefore includes more than staffing. It involves defining competencies, responsibilities, authority, workload, communication channels, decision rights, performance expectations and mechanisms for collaboration.

stakeholders provide input before action or decision. Informed stakeholders receive relevant information.

A RACI matrix is particularly useful when several organisations collaborate. It exposes

💡 Key Concepts to Remember

Core Takeaway: The WBS decomposes 100% of project scope into manageable work packages, activities and tasks.

- A schedule translates scope into time by defining duration, sequence, dependencies and milestones.
- A GANTT chart supports both planning and monitoring.

- Project HRM links roles and competencies to workload, communication and decision rights.

📝 Self-Assessment & Reflection

1. What is the purpose of a WBS?
2. What is the difference between a task and a milestone?
3. Why are dependencies important in scheduling?
4. What does each letter in RACI represent?
5. How can workload and accountability be tested before implementation?

🔍 Module Glossary

WBS: Work Breakdown Structure; hierarchical decomposition of project scope.

Work Package: A manageable grouping of related project work.

Dependency: A logical relationship determining task sequence.

Milestone: A zero-duration marker representing a significant event or achievement.

GANTT Chart: Time-based visual representation of tasks, durations, dependencies and milestones.

RACI: Responsibility matrix identifying Responsible, Accountable, Consulted and Informed roles.

MODULE 6. Budgeting, Financial Management, Procurement, Reporting and Microsoft Project

📖 Theoretical Foundations

6.1 The Budget as a Financial Expression of the Work Plan

A project budget should not be developed independently from activities. It is the financial expression of the implementation plan. Each significant cost should be traceable to a necessary activity, output or management requirement. Conversely, activities requiring resources should be reflected in the budget.

Activity-based budgeting starts by identifying the resources needed for each activity: staff time, travel, equipment, services, materials, venue, communication, data collection and other eligible costs. Costs are then calculated using units, quantities and unit prices. This makes assumptions transparent and supports later financial monitoring.

6.2 Financial Management

Financial management ensures that resources are used for approved purposes, within applicable rules, and with sufficient documentation to demonstrate accountability. Core functions include budget control, expenditure authorisation, supporting documentation, cost allocation, cash-flow awareness, variance analysis, financial reporting and audit trail.

6.3 Procurement

Procurement is the process of acquiring goods, works or services needed for project implementation. In publicly funded projects, procurement must protect fairness, transparency and value for money. Exact procedures depend on the legal framework, grant agreement, programme rules, thresholds and organisational status.

6.4 Monitoring and Reporting

Monitoring is the continuous collection and use of information about implementation and results. Reporting communicates that information to managers, funders and stakeholders. Strong reporting is therefore built on a monitoring system designed from the beginning of the project.

Narrative reporting should explain what was planned, what was achieved, what evidence supports achievement, what deviations occurred, why they occurred and what corrective actions are proposed. Financial reporting should be consistent with the narrative: expenditure should correspond to implemented activities and documented progress.

6.5 Microsoft Project: Core Functions

Microsoft Project is a scheduling and resource-planning tool. Its value depends on the quality of the underlying project logic. Software cannot compensate for poorly defined activities, unrealistic durations or unclear dependencies.

💡 Key Concepts to Remember

Core Takeaway: The budget is the financial expression of the work plan and should be traceable to activities and resources.

- Financial control links expenditure to approved purposes, supporting documents, eligibility and physical progress.
- Procurement requires transparency, equal treatment, proportionality, competition, value for money and documentation.
- Progress reporting integrates activities, results, indicators, expenditure, deviations, risks and corrective action.
- Microsoft Project can operationalise task sequencing, milestones, predecessors, calendars and resource assignments.

📝 Self-Assessment & Reflection

1. Why should a project budget be activity-based?
2. What does a budget variance indicate and how should it be interpreted?
3. Which principles underpin transparent procurement?
4. What evidence should a concise progress report connect?
5. Which scheduling elements should be checked in Microsoft Project before approving a work plan?

🔍 Module Glossary

Activity-Based Budget: Budget structured around the resources required to implement project activities.
Variance: Difference between planned and actual expenditure or performance.
Eligibility: Compliance of a cost with applicable funding and contractual rules.
Audit Trail: Documentary chain demonstrating authorisation, transaction, delivery and accounting evidence.
Procurement: Process for acquiring goods, works or services under applicable rules and principles.
Progress Report: Structured account of implementation status, results, expenditure, deviations, risks and corrective actions.
Predecessor: A task that determines when another task can start or finish in a schedule.