PROJECT MANAGEMENT

TRAINING MANUAL

Trainer: Assoc. Prof. PhD Carmen Chasovschi, PhD
Topic: Project Management
Total Duration: 60 hours (Theory: **10 hours** / Practice: **18 hours** / Evaluation: **2 hours** / Self-study: **30 hours**)

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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.

Competency Type	Detailed Description
	• 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. • 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.

The PCM Quality Perspective

The PCM approach places quality at the centre of the project cycle. A project is not considered good merely because activities are delivered on time. It should address real and priority needs, be feasible with the resources and capacities available, and have a credible prospect of producing sustainable benefits. These dimensions are closely connected to the later OECD/DAC evaluation criteria of relevance, coherence, effectiveness, efficiency, impact and sustainability (OECD, 2019).

For training purposes, three questions should accompany every design decision: Is this intervention relevant to the people and context? Is it feasible within the available time, resources and institutional capacity? Are the expected benefits likely to continue or create lasting value?

PART I. COURSE CONTENT

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

📖 Theoretical Foundations

1.1 What Is a Project?

A project is a temporary and purposeful intervention created to produce a defined change, product, service or result. Unlike routine operations, a project has a beginning and an end, specific objectives, a defined scope, resource constraints and a degree of uncertainty. Projects are therefore instruments of change. They are used when an organisation, community or partnership wants to move from a current situation to a desired future situation through a coordinated set of actions.

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.

Project	Routine operation
Temporary; defined start and end	Continuous or repetitive
Unique or context-specific result	Standardised recurring output
Change-oriented	Stability/continuity-oriented
Higher uncertainty and interdependence	More predictable processes
Requires project-specific planning and governance	Managed through standing procedures

1.2 Project Cycle Management

Project Cycle Management is a management framework used by the European Commission to improve the quality of project and programme design and management. The 2004 PCM Guidelines organise the cycle around a sequence of decision-making stages and integrate the Logical Framework Approach as a core analytical and planning methodology (European Commission, 2004).

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

1.3 Core PCM Principles

The European Commission PCM approach is built around several mutually reinforcing principles. First, projects should be relevant: they should respond to demonstrated needs and be consistent with policy and stakeholder priorities. Second, they should be feasible: objectives and plans must be realistic given resources, institutional capacities, risks and time. Third, projects should support sustainable benefits rather than short-lived outputs. Fourth, stakeholders should participate in analysis and decision-making, because ownership and legitimacy are essential to implementation. Fifth, planning should be results-oriented and based on explicit intervention logic.

These principles prevent a common failure mode in project development: starting with a preferred activity and then searching for a problem that can justify it. PCM reverses that sequence. The team first understands the situation, then identifies problems and stakeholders, then defines objectives, and only then chooses activities.

Design rule
Do not begin with 'We want to organise training / build a platform / buy equipment.' Begin with 'What problem or unmet need exists, for whom, why does it exist, and what evidence supports this diagnosis?'

1.4 Project Idea Generation

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.

Good brainstorming separates divergence from convergence. During divergence, participants generate many ideas without immediate judgement. During convergence, ideas are clustered, tested and prioritised against criteria such as relevance, expected benefit, feasibility, cost, stakeholder acceptance and strategic alignment. This avoids both premature rejection and uncritical enthusiasm.

Idea source	Diagnostic question	Example
Need	What important gap affects the target group?	Low digital access among older residents
Weakness	What internal limitation prevents good performance?	Insufficient project monitoring capacity
Opportunity	What external change could create value?	New EU funding priority for green skills
Threat	What external risk requires a response?	Declining visitor numbers in a heritage area
Stakeholder demand	What do affected groups identify as priority?	Students request stronger career-transition support

1.5 From Idea to Preliminary Project Concept

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.

1.6 Practical Application

- Select one real or realistic context.
- List at least five observed needs, weaknesses or opportunities.
- Generate at least ten possible intervention ideas without evaluating them.
- Cluster the ideas and define 3-5 screening criteria.
- Select one idea and write a 150-word preliminary concept statement.
- Identify what evidence would be required before the idea could be considered justified.

1.7 Common Mistakes

- Starting from an activity or technology rather than a need.
- Defining the target group too broadly ('young people', 'SMEs', 'citizens') without segmentation.
- Confusing an assumption with evidence.
- Selecting an idea because funding is available, without checking strategic fit.
- Treating brainstorming as decision-making rather than as idea generation.

💡 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.

Recommended References and Sources

- European Commission (2004), Project Cycle Management Guidelines. Aid Delivery Methods, Volume 1. Brussels: European Commission.
- European Commission (2025), Logical Framework Approach (LFA). EXACT External Wiki.
- OECD (2019), Better Criteria for Better Evaluation: Revised Evaluation Criteria Definitions and
- Project Management Institute (2021), A Guide to the Project Management Body of Knowledge (PMBOK Guide) and The Standard for Project Management, 7th ed.

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.

A useful needs analysis distinguishes symptoms from underlying causes. For example, 'low participation in training' may be a symptom. Causes could include inaccessible scheduling, irrelevant content, lack of employer support, financial barriers or low trust. Designing a project against the symptom without understanding the cause can lead to ineffective activities.

Evidence type	Strength	Limitation
Administrative/statistical data	Scale, comparability, trends	May not explain causes
Survey	Structured perceptions and behaviours	Depends on sampling and question quality
Interview/focus group	Depth and causal insight	Smaller numbers; interpretation required
Observation	Direct view of practice	Context-specific
Policy/evaluation documents	Existing analysis and priorities	May be outdated or general

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.

Numerical estimation is important. A proposal that refers only to 'employees', 'students' or 'local communities' leaves major questions unanswered. How many? Which subgroups? Why these groups? What proportion will be reached? What selection criteria will be used? A quantified and characterised target group supports realistic indicators, budgets and implementation planning.

Quality check
A strong target-group description answers: who, how many, where, what characteristics, what need, what evidence, and why this group is prioritised.

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.

SWOT is useful only when it moves beyond listing. The purpose is interpretation. Which weakness is critical to project success? Which strength can be mobilised? Which opportunity creates a realistic opening for action? Which threat could undermine the intervention? The most useful project ideas often emerge from combinations: use a strength to

exploit an opportunity, correct a weakness to exploit an opportunity, use strengths to reduce a threat, or reduce vulnerabilities exposed by a threat.

Statements should be specific and evidence-based. 'Good team' is too vague. 'Five staff members with certified facilitation competence and experience in three EU partnerships' is more actionable. Similarly, 'lack of money' is not a useful weakness unless the financial constraint is defined and connected to the proposed intervention.

Internal	**Positive**	**Negative**
Organisation / partnership	Strengths: assets, capabilities, relationships, reputation	Weaknesses: gaps, constraints, low capacity, inefficient processes
External	**Positive**	**Negative**
Environment	Opportunities: policy, funding, technology, market, partnerships	Threats: regulation, competition, demographic change, instability, external risks

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.

The European Commission PCM Guidelines emphasise stakeholder participation because project relevance and sustainability depend on understanding different perspectives. A project designed only from the implementing organisation's viewpoint may overlook barriers, conflicts or incentives experienced by beneficiaries and partners.

The power-interest matrix is a useful first classification. High-power/high-interest stakeholders normally require close engagement; high-power/low-interest actors should be kept satisfied and consulted strategically; low-power/high-interest groups need meaningful information and participation; low-power/low-interest actors may require proportionate monitoring. However, power is dynamic. A low-power group may become influential through networks, media attention or coalition-building.

Stakeholder	**Interest / need**	**Influence**	**Possible contribution**	**Possible resistance**	**Engagement**
Target group	Improved service/access	Medium	Experience, feedback	Low trust / time constraints	Co-design and regular feedback
Public authority	Policy outcomes/compliance	High	Legitimacy, data, coordination	Competing priorities	Formal steering role
Project team	Successful delivery	High	Technical work	Workload pressure	Clear roles and communication

2.5 Problem Analysis and the Problem Tree

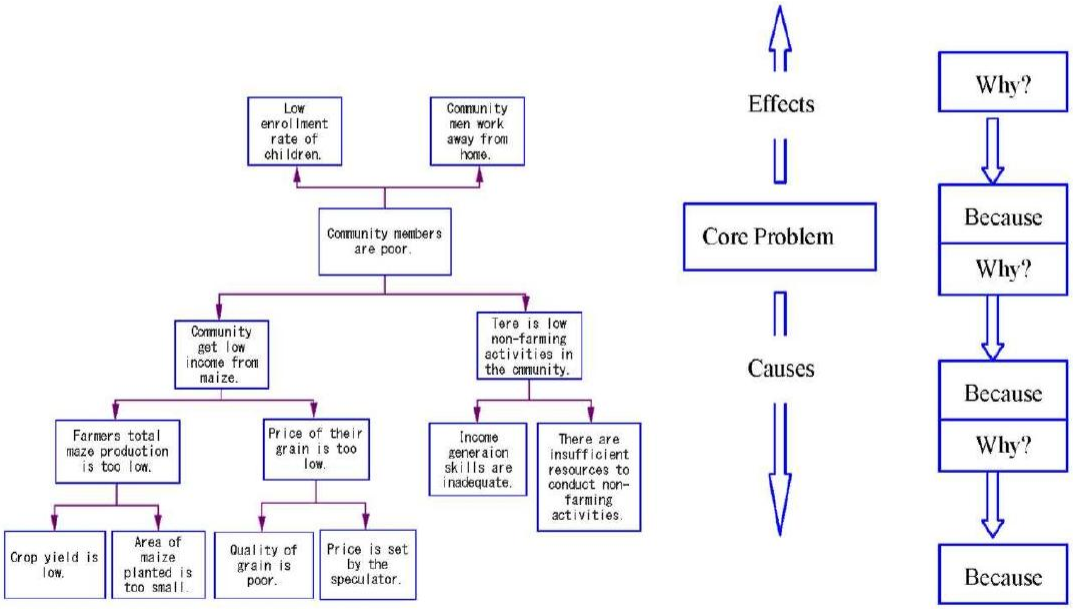
Problem analysis is one of the central analytical steps in the Logical Framework Approach. The team identifies the negative aspects of an existing situation and establishes cause-effect relationships. The output is a Problem Tree: a visual model with a core problem, causes below it and effects above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

A Problem Tree is not automatically objective truth. It is a shared analytical hypothesis that should be tested against evidence and stakeholder perspectives. Its value lies in making causal assumptions explicit. Teams can then challenge whether one factor really causes another, whether important branches are missing, and which causes are realistically within the project's sphere of influence.

Handout "Problem Tree and Objective Tree"

Structure of Problem Tree



2.6 Building a High-Quality Problem Tree

- Define the focal population and context before formulating the core problem.
- Write problems as existing negative conditions, not as missing solutions.
- Place direct causes immediately below the core problem and deeper causes below them.
- Place direct effects above the core problem and wider consequences above them.
- Test every link by reading upward: 'A contributes to B'.
- Check whether the same statement appears as both cause and effect.
- Use evidence and stakeholder consultation to validate disputed links.
- Do not attempt to include every problem in the system; focus on the intervention-relevant system.

2.7 Practical Application: Integrated Diagnosis

Participants should now combine needs evidence, SWOT, stakeholder analysis and the Problem Tree. These tools answer different questions and should not be treated as substitutes. Needs analysis establishes the gap and its significance. SWOT positions the implementing organisation and environment. Stakeholder analysis shows interests and influence. Problem analysis models the causal structure of the focal problem.

The integrated diagnosis should result in a clear statement of the problem, affected groups, main causes, strategic context and stakeholder landscape. Only after this point should the project move decisively toward objectives and solutions.

💡 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.

Recommended References and Sources

- European Commission (2004), Project Cycle Management Guidelines. Aid Delivery Methods, Volume 1. Brussels: European Commission.
- European Commission (2025), Logical Framework Approach (LFA). EXACT External Wiki.
- OECD (2019), Better Criteria for Better Evaluation: Revised Evaluation Criteria Definitions and Principles for Use. Paris: OECD Publishing.
- Project Management Institute (2021), A Guide to the Project Management Body of Knowledge (PMBOK Guide) and The Standard for Project Management, 7th ed.

MODULE 3. Objectives Tree, SMART Objectives and Project Design

📖 Theoretical Foundations

3.1 From Problems to Objectives

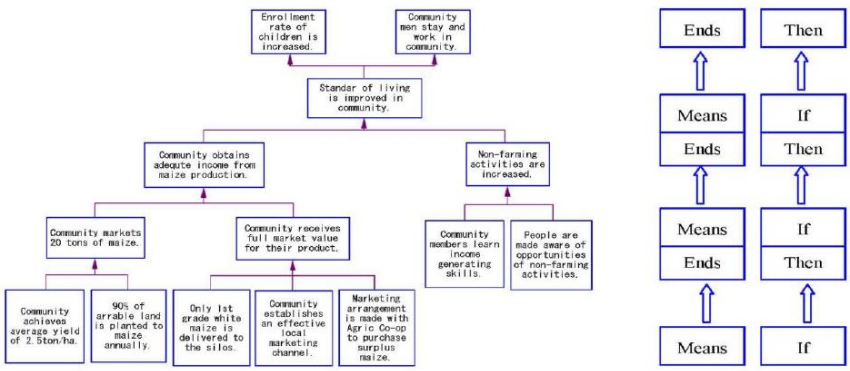
Objectives analysis converts the negative conditions in the Problem Tree into desirable, realistically achievable future conditions. The resulting Objectives Tree expresses a means-ends relationship. Lower-level conditions function as means that contribute to higher-level ends.

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.

For example, 'low digital confidence among older adults' may become 'improved digital confidence among participating older adults'. A cause such as 'limited access to guided practice' may become 'regular access to guided practice is available'. These positive statements can then be examined as potential results or objectives.

Handout “Problem Tree and Objective Tree”

Structure of Objective Tree



2. Examine the means and ends relationships thus derived to assure validity and completeness of the diagram. If necessary, revise statements, add new objectives, and delete objectives

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.

Scope is therefore a strategic decision. A project that attempts to solve every cause usually becomes unrealistic. A well-designed project identifies a coherent cluster of causes that can reasonably be influenced within the available time and resources, while recognising external conditions and complementary actions.

The selected strategy should also clarify boundaries. What will the project not do? Which needs require referral to other programmes? Which results depend on external actors? Explicit boundaries reduce later scope creep.

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.

The project should be accountable for what lies within its reasonable influence. It can usually control activities and outputs more directly than long-term impact. This distinction is essential when selecting indicators and assigning responsibility.

Level	Question	Example
Impact / overall objective	What broader long-term change do we contribute to?	Improved social inclusion of older adults
Outcome / specific objective	What change in behaviour, capacity or condition is expected?	Participants independently use essential digital public services
Output / result	What direct product/service/capacity will the project deliver?	120 participants complete guided digital-skills sessions
Activity	What will the project team do?	Develop curriculum; recruit; deliver workshops

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.

SMART should improve strategic precision, not turn every objective into an overloaded sentence. In some logical frameworks, the objective statement remains concise while measurement details are placed in indicators. The essential principle is that the combination of objective and indicators must make expected achievement unambiguous.

Weak objective: 'Improve digital skills.' Stronger formulation: 'By the end of the 12-month project, increase the ability of at least 90 of 120 participating adults aged 65+ to independently complete three priority online public-service tasks.' The second formulation clarifies population, change, scale and timeframe.

3.5 Objective Quality Tests

- Does the objective describe a change rather than an activity?
- Is the target group explicit?
- Can achievement be verified?
- Is the level of ambition plausible?
- Is the objective directly connected to the diagnosed problem?
- Does the project have sufficient influence over the objective?
- Is the timeframe clear?
- Would different readers interpret the objective in the same way?

3.6 Practical Application

- Convert the Problem Tree into an Objectives Tree.
- Mark branches that fall outside the project mandate.
- Select one coherent intervention strategy and justify the selection.
- Write one overall objective and one or more specific objectives.
- Apply the SMART test and revise.

- Conduct peer review: each team identifies one ambiguity, one unrealistic assumption and one missing measurement element.

💡 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.

Recommended References and Sources

- European Commission (2004), Project Cycle Management Guidelines. Aid Delivery Methods, Volume 1. Brussels: European Commission.
- European Commission (2025), Logical Framework Approach (LFA). EXACT External Wiki.
- OECD (2019), Better Criteria for Better Evaluation: Revised Evaluation Criteria Definitions and Principles for Use. Paris: OECD Publishing.
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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.

A common mistake is to start by filling in a logframe table. This reverses the logic. The matrix should emerge after stakeholder analysis, problem analysis, objectives analysis and strategy selection. When those analyses are weak, the matrix merely compresses weak thinking into a formal template.

The Logical Framework Matrix typically connects intervention logic with indicators, sources of verification and assumptions. Reading vertically tests the causal logic: if activities are implemented and assumptions hold, outputs should be produced; if outputs are produced and assumptions hold, outcomes should become more likely. Reading horizontally tests measurability and evidence.

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.

The distinction between outputs and outcomes is particularly important. Delivering 20 workshops is not an outcome. It is an activity. Producing a curriculum and training 120 people are outputs. Increased independent use of digital services is an outcome. Improved social inclusion may be an impact. Results-based management shifts attention from 'what we did' toward 'what changed'.

Element	Typical control	Illustrative formulation
Inputs	High	€50,000; project staff; training venue
Activities	High	Develop materials; deliver mentoring
Outputs	High/medium	120 participants trained; toolkit produced
Outcomes	Medium	Participants apply new skills independently
Impact	Low/direct control; contribution only	Improved inclusion and service access

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.

Indicators may measure quantity, quality, time, coverage, behaviour, capacity, satisfaction, institutional performance or other dimensions. Strong indicators often include multiple dimensions. 'Number trained' measures reach but not learning or application. A more informative outcome indicator might be 'percentage of participants who independently complete three defined online tasks within eight weeks of training'.

Indicator design should also consider disaggregation where relevant: sex, age, location, organisational type, vulnerability category or other characteristics. Disaggregation can reveal whether benefits are distributed equitably.

4.4 Baselines, Targets and Sources of Verification

A baseline is the value of an indicator before or at the start of intervention. A target is the expected value by a specified time. Without a baseline, a project may know the final value but not the magnitude of change. Without a target, monitoring lacks a clear reference for expected performance.

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.

Monitoring responsibility should also be assigned. Who collects the data? How often? Who validates it? Where is it stored? How will data quality be checked? These questions connect indicator design to implementation capacity.

Result	Indicator	Baseline	Target	Source
Participants use digital services independently	% completing 3 defined tasks without assistance	25%	75% by month 12	Practical assessment + follow-up survey
Local staff apply new monitoring procedure	% of monthly reports meeting quality checklist	20%	90% by month 10	Internal quality audit

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.

Assumptions should be specific and significant. Trivial statements add no value. Extremely unlikely conditions may indicate that the project strategy is not viable. Where an external factor is important and uncertain, the team should consider whether it can be influenced, monitored as a risk, incorporated into the project design or treated as a 'killer assumption' requiring redesign.

Assumptions analysis therefore connects the logical framework with risk management. It prevents the project from presenting a deterministic chain of change in a complex environment.

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.

4.7 Practical Workshop: Build a Simplified Logframe

Intervention logic	Indicators	Sources of verification	Assumptions
Overall objective / impact			
Specific objective / outcome			
Outputs / results			
Activities / inputs			

- Populate the first column from the Objectives Tree and selected strategy.
- Check whether outputs are products/services and the specific objective is a change.
- Develop 1-3 indicators for each major result.
- Add baseline and target information to indicator definitions.
- Identify feasible evidence sources.
- Identify external assumptions at each causal transition.
- Conduct a vertical-logic review and a horizontal-logic review.

💡 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.

Recommended References and Sources

- European Commission (2004), Project Cycle Management Guidelines. Aid Delivery Methods, Volume 1. Brussels: European Commission.
- European Commission (2025), Logical Framework Approach (LFA). EXACT External Wiki.
- OECD (2019), Better Criteria for Better Evaluation: Revised Evaluation Criteria Definitions and Principles for Use. Paris: OECD Publishing.
- Project Management Institute (2021), A Guide to the Project Management Body of Knowledge (PMBOK Guide) and The Standard for Project Management, 7th ed.

MODULE 5. Project planning and scheduling: 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.

The purpose of decomposition is managerial clarity. Work should be broken down far enough to estimate duration, assign responsibility, identify dependencies and estimate resources, but not so far that the plan becomes administratively unmanageable. The appropriate level depends on project complexity and control needs.

A useful completeness test is the 100% rule: the WBS should represent all work required to deliver the agreed project scope, including management, monitoring, communication and reporting, not only technical activities.

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.

Milestones are zero-duration points representing significant achievements or decision gates, such as approval of methodology, completion of recruitment, launch of pilot, acceptance of deliverable or final review. Milestones are useful for governance because they make critical progress visible.

A schedule should reflect real constraints: staff availability, procurement lead times, approval procedures, seasonality, stakeholder calendars and dependencies on external decisions. A visually attractive GANTT chart is not necessarily a realistic plan.

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.

The chart should be derived from the intervention logic and WBS. If activities appear in the GANTT but have no connection to outputs, they may represent scope creep. Conversely, if an output has no sufficient activities, the schedule is incomplete.

During implementation, the GANTT becomes a monitoring instrument. Managers update actual start/finish dates, review slippage, examine dependency effects and decide whether corrective action is required.

Activity	Duration	Predecessor	Milestone / output link	Responsible
A1.1 Needs validation	2 weeks	—	Validated needs report	Research lead
A1.2 Curriculum design	3 weeks	A1.1	Draft curriculum	Training lead
A1.3 Pilot delivery	4 weeks	A1.2	Pilot completed	Training team
A1.4 Revision	2 weeks	A1.3	Final curriculum approved	Project manager

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.

Roles should be linked to work. A project manager coordinates scope, time, resources, stakeholders and risks but should not automatically become responsible for every technical output. Work-package or task leaders need clear

ownership. Financial, procurement, communication, monitoring and technical functions should be explicit where relevant.

Capacity should be assessed realistically. A highly competent person who has only 10% availability may represent a greater implementation risk than a moderately experienced person with sufficient time and support.

5.5 RACI and Responsibility Allocation

RACI clarifies participation in tasks or decisions. Responsible is the person or role doing the work. Accountable is the role ultimately answerable for completion and approval. Consulted stakeholders provide input before action or decision. Informed stakeholders receive relevant information.

A RACI matrix is particularly useful when several organisations collaborate. It exposes duplication, gaps and excessive consultation. Each key task should normally have clear accountability. Too many 'A' assignments create ambiguity; too many 'C' assignments can slow decision-making.

Task	Project Manager	Technical Lead	Finance	Partner
Approve methodology	A	R	I	C
Deliver pilot	C	A/R	I	R
Verify expenditure	I	C	A/R	I
Submit progress report	A/R	C	C	I

⚙️ Practical Activities & Exercises

- Create a WBS linked to project outputs.
- Estimate activity durations and identify dependencies.
- Prepare a GANTT chart.
- Check whether workload and accountability are realistic.
- Identify 5-10 key milestones.
- Define project roles and required competencies.

💡 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.

Recommended References and Sources

- European Commission (2004), Project Cycle Management Guidelines. Aid Delivery Methods, Volume 1. Brussels: European Commission.
- European Commission (2025), Logical Framework Approach (LFA). EXACT External Wiki.
- OECD (2019), Better Criteria for Better Evaluation: Revised Evaluation Criteria Definitions and Principles for Use. Paris: OECD Publishing.
- Project Management Institute (2021), A Guide to the Project Management Body of Knowledge (PMBOK Guide) and The Standard for Project Management, 7th ed.

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.

Budget realism requires both economy and adequacy. Under-budgeting can make delivery impossible; over-budgeting can reduce value for money and credibility. Programme-specific eligibility rules always take precedence over generic budgeting logic.

Cost item	Unit	Quantity	Unit cost	Total	Activity link
Trainer	day	8	€350	€2,800	A2.1
Training room	day	4	€180	€720	A2.1
Participant materials	set	120	€12	€1,440	A2.1
External evaluation	service	1	€4,000	€4,000	A4.2

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.

Variance analysis compares planned and actual expenditure. A variance is not automatically a problem; it is a signal requiring interpretation. Lower expenditure may reflect efficiency, delayed activities or under-delivery. Higher expenditure may reflect price changes, scope issues or weak control. Managers should connect financial variance to physical progress rather than analysing money in isolation.

Good financial management is preventive. Clear responsibilities, approval thresholds, document standards and regular budget reviews reduce the risk of ineligible costs or late corrective action.

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.

Core principles include transparency, equal treatment, non-discrimination, proportionality, competition, avoidance of conflicts of interest and adequate documentation. Specifications should describe the need without unjustifiably favouring a supplier. Evaluation criteria should be defined before offers are assessed. Decisions should be documented so that an independent reviewer can understand how the selection was made.

Procurement planning should begin early because lead times can affect the GANTT chart. A technically simple purchase may become a schedule risk if approvals, market consultation, tendering or delivery require several weeks or months.

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.

A weak report lists activities. A strong report interprets performance. For example, rather than stating 'four workshops were delivered', it may explain attendance against target, learning results, participant profile, deviations, lessons and implications for the next period.

Reporting question	Evidence
What was delivered?	Activity records, deliverables, attendance
What changed?	Indicators, tests, surveys, administrative data
Are we on schedule?	Updated GANTT, milestone status
Are we within budget?	Budget-versus-actual report
What risks/deviations exist?	Risk log, issue log, management notes
What will change next?	Corrective action and revised forecast

6.5 Evaluation and the OECD/DAC Criteria

Evaluation provides a systematic assessment of an intervention and supports accountability and learning. The OECD/DAC criteria offer six complementary lenses: relevance, coherence, effectiveness, efficiency, impact and sustainability (OECD, 2019). These criteria are not merely end-of-project questions. They can improve design when considered early.

Relevance asks whether the intervention is doing the right things for the context and stakeholders. Coherence examines how well it fits with other interventions and policies. Effectiveness considers achievement of objectives. Efficiency examines how well resources are converted into results. Impact asks what difference the intervention makes, including broader effects. Sustainability examines whether benefits are likely to last.

Using these criteria during formulation improves evaluability. If a team cannot explain how effectiveness will be assessed, objectives and indicators may be too vague. If sustainability depends entirely on future funding that has not been considered, the design is incomplete.

6.6 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.

The basic workflow is to define the project start date and calendar, enter tasks, organise them into summary tasks/work packages, estimate durations, define predecessors, create milestones and assign resources. The GANTT view then visualises the schedule. Users can review critical tasks, workload and slippage as the plan develops.

A disciplined user avoids entering arbitrary dates for every task. Where possible, the schedule should be driven by durations and dependencies. This allows changes to propagate logically when one task moves. Baselines can later be used to compare the approved schedule with actual performance.

6.7 Practical Microsoft Project Exercise

- Create a new project and set the project start date.
- Enter the WBS as summary tasks and activities.
- Enter durations rather than manually fixing all dates.
- Create task dependencies using predecessors.
- Insert milestones for major decision/achievement points.
- Assign responsible resources.
- Review the GANTT view and identify unrealistic overlaps.
- Save a baseline if appropriate for the exercise.
- Export or print the schedule for inclusion in the Personal Project Portfolio.

6.8 Integrated Project Quality Review

Before a project concept is considered complete, the team should perform an integrated coherence check. The need should justify the problem. The Problem Tree should justify the objectives. The objectives should justify the results. Results should require the planned activities. Activities should appear in the schedule and budget. Responsibilities

should be assigned. Indicators should measure the intended changes. Procurement and financial arrangements should support implementation. Reporting should be able to draw evidence from the monitoring system.
This integrated review is one of the most valuable habits in project management because many weaknesses occur at the interfaces between components rather than inside a single tool.

💡 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.

Recommended References and Sources

- European Commission (2004), Project Cycle Management Guidelines. Aid Delivery Methods, Volume 1. Brussels: European Commission.
- European Commission (2025), Logical Framework Approach (LFA). EXACT External Wiki.
- OECD (2019), Better Criteria for Better Evaluation: Revised Evaluation Criteria Definitions and Principles for Use. Paris: OECD Publishing.
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PART II. Cross-Cutting Project Management Topics

📖 **Theoretical Foundations**

7. Stakeholder Engagement and Communication

Stakeholder analysis identifies who matters; stakeholder engagement defines how relationships will be managed over time. Engagement ranges from information provision to consultation, involvement, collaboration and shared decision-making. The appropriate level depends on stakeholder influence, rights, expertise, exposure to project effects and the nature of the decision.

Communication planning should specify audiences, information needs, purpose, channel, frequency, sender and feedback mechanism. Communication is not equivalent to dissemination. A project may need internal coordination communication, governance communication, beneficiary engagement, public visibility, risk communication and formal reporting.

The quality principle is usefulness: the right information should reach the right stakeholder at the right time in an understandable form. Over-communication can be as ineffective as under-communication if stakeholders receive large volumes of irrelevant information.

Audience	Need	Purpose	Channel	Frequency
Steering committee	Performance, risks, decisions	Governance	Dashboard + meeting	Monthly
Target group	Activities, access, feedback	Participation	Email/SMS/community sessions	As required
Project team	Tasks, dependencies, issues	Coordination	Weekly meeting + task board	Weekly
Funder	Results, expenditure, deviations	Accountability	Formal report	Contractual

8. Risk Management

Risk is uncertainty that may affect project objectives. Risk management is the systematic process of identifying, analysing, responding to and monitoring uncertainty. In PCM, assumptions analysis already highlights external conditions. A risk register develops this thinking operationally.

Risk analysis commonly assesses probability and impact. Some organisations add proximity, detectability or velocity. Responses may include avoidance, reduction/mitigation, transfer/sharing, acceptance and contingency planning. The response should have an owner and a trigger or monitoring indicator where possible.

Risks should not be generic. 'Political risk' is too broad. 'Municipal approval for the pilot site may be delayed beyond month 4, preventing installation before the winter season' is actionable. It can be monitored and linked to mitigation.

Risk	Probability	Impact	Response	Owner	Trigger
Recruitment below target	Medium	High	Partner outreach + reserve list	WP lead	<50% target by week 3
Procurement delay	Medium	High	Early specification and market check	PM	Tender not launched by M2
Staff turnover	Low	Medium	Documentation + deputy role	Director	Notice received

9. Quality Management

Project quality has two dimensions: quality of management processes and quality of outputs/results. Quality planning defines standards and acceptance criteria before work is completed. Quality assurance checks whether processes are suitable. Quality control checks whether deliverables meet defined criteria.

Acceptance criteria should be specific. 'High-quality report' is not an operational criterion. Criteria may include completeness, methodological compliance, accuracy, usability, accessibility, formatting, stakeholder validation and approval requirements.

Quality should be proportionate. Excessive review can delay delivery, while insufficient review creates rework and reputational risk. Responsibility for drafting, checking and approving should be explicit in the work plan and RACI matrix.

10. Change Control and Adaptive Management

Projects operate in changing environments, so adaptation is normal. However, unmanaged change can undermine scope, budget and accountability. Change control provides a structured way to assess proposed modifications.

A change request should explain what is changing, why, the effect on objectives, outputs, schedule, budget, risks and stakeholders, and who has authority to approve it. Minor operational adjustments may be delegated to the project manager; major changes may require steering committee or funder approval.

Adaptive management is not the absence of planning. It is disciplined learning: monitor evidence, test assumptions, identify when the original plan no longer fits reality, and adjust within governance rules.

11. Sustainability and Exit Planning

Sustainability is the likelihood that benefits will continue after external support ends. The PCM Guidelines treat sustainability as a design concern, not merely an evaluation criterion. Relevant dimensions include policy support, institutional capacity, ownership, economic and financial viability, technology appropriateness, environmental effects and socio-cultural factors.

Exit planning asks what will happen to services, assets, data, partnerships, trained staff and responsibilities when project funding ends. If continuation is expected, who will pay? Who will own and maintain assets? Are procedures embedded in institutional systems? Are beneficiaries capable of continuing without project support?

Not every output must continue forever. Sustainability should focus on benefits and capacities that matter. A temporary pilot can be successful if it generates evidence that changes policy or practice.

PART III. Applied Templates and Worked Examples

📖 Theoretical Foundations

12. Worked Example: Digital Inclusion Project

Context: A municipality observes that many residents aged 65+ cannot independently use essential online public services. Administrative data show increasing digitalisation of appointments and applications, while interviews with community organisations indicate that older residents rely heavily on relatives or front-office staff.

Preliminary need: improve practical digital confidence and access to guided support for older residents who are willing to use online services but lack confidence and repeated practice.

12.1 Example SWOT

Strengths	Weaknesses	Opportunities	Threats
Existing community centres; motivated librarians; municipal data access	Limited digital-training methodology; fragmented referral system	National digitalisation programme; university volunteers; available EU funding	Rapid platform changes; cyber-fraud concerns; low trust among some residents

12.2 Example Stakeholders

Stakeholder	Interest	Influence	Engagement
Older residents	High	Medium	Co-design, testing, feedback
Municipality	High	High	Steering and data access
Libraries	High	Medium	Delivery partner
University students	Medium	Low/medium	Digital companion volunteers
Service agencies	Medium	High	Technical input and referral

12.3 Example Problem Tree

Core problem: A significant proportion of older residents cannot independently access essential online public services.

Direct causes: low confidence in completing online procedures; insufficient opportunities for guided practice; fragmented information about available support; accessibility barriers in some interfaces.

Effects: dependence on relatives or staff; delayed access to services; increased risk of exclusion; frustration and reduced trust in digital public administration.

12.4 Example Objectives and Results

Level	Example
Overall objective	Contribute to more inclusive access to public services for older residents.
Specific objective	By month 12, increase independent use of three priority online public services among participating residents aged 65+.
Output 1	Practical curriculum and support materials developed and tested.
Output 2	120 residents complete guided practice sessions.
Output 3	Local digital-companion referral network established.

12.5 Example Indicators

Result	Indicator	Baseline	Target	Verification
Specific objective	% of participants independently	25%	75%	Practical test + follow-up

	completing 3 priority tasks			
Output 2	# participants completing at least 4 guided sessions	0	120	Attendance records
Output 3	# active referral points using common protocol	0	8	Partner records

12.6 Example WBS and Schedule Logic

- WP1 Analysis and co-design: validate needs, select services, co-design curriculum.
- WP2 Capacity building: train facilitators, prepare materials and support protocol.
- WP3 Pilot delivery: recruit participants, deliver guided sessions, provide follow-up.
- WP4 Monitoring and evaluation: baseline, learning assessment, follow-up, lessons.
- WP5 Management and communication: coordination, finance, procurement, reporting.

12.7 Example Budget Logic

The budget should follow the WBS. WP1 may require research/facilitation staff and co-design workshops. WP2 may require trainer time and materials. WP3 may require venue, facilitator time, accessibility support and communication. WP4 requires data collection and analysis. WP5 includes project management, financial administration and reporting. Every cost should be justified by the work plan and comply with the relevant funding rules.

PART IV. Individual Study Guide — 30 Hours

13.1 Needs and Evidence — 4 hours
Collect at least three types of evidence about the selected problem. Prepare a 1-2 page needs note describing the current situation, desired situation, target group, scale of need and evidence limitations.

13.2 SWOT and Stakeholders — 4 hours
Complete a specific SWOT and stakeholder matrix. Identify at least five stakeholders and explain engagement strategy for each. Highlight one strategic weakness and one external opportunity that materially shape the project.

13.3 Problem and Objectives Trees — 4 hours
Develop a Problem Tree with at least two levels of causes and effects. Convert it into an Objectives Tree and select the branch(es) the project will address.

13.4 Objectives, Results and Indicators — 6 hours
Write the objective hierarchy and simplified logical framework. Develop indicators with baseline, target and verification source. Identify at least three assumptions.

13.5 WBS, GANTT and HR — 5 hours
Develop the WBS and schedule. Identify milestones, dependencies and responsibilities. Create a RACI matrix for at least eight key tasks.

13.6 Budget — 3 hours
Prepare an activity-based budget with units, quantities and unit costs. Explain the link between major cost categories and activities.

13.7 Project Application — 4 hours
Fill in the document Project Application and integrate all the points listed abote in an integrated document. Each team member should coordinate a work package. The project application can be uploaded as a result of the entire team.

13.9 Personal Project Portfolio Checklist
- Need statement and evidence summary
- Target-group description and estimate
- SWOT
- Stakeholder matrix
- Problem Tree
- Objectives Tree
- SMART objective(s)
- Results chain / simplified logframe
- Indicators, baselines and targets
- WBS
- GANTT
- RACI / HR plan
- Budget
- Procurement/reporting note
- Microsoft Project schedule

PART V. Assessment, Self-Check Questions and Practice Tasks

14. Assessment Framework

Criterion	Indicative weight	What good performance looks like
Relevance and needs orientation	15%	Clear evidence, defined target group, justified priority
Analytical quality	15%	Coherent SWOT, stakeholder and problem analysis
Intervention logic	20%	Objectives, results and activities form a credible causal chain
Indicators and monitoring	15%	Measurable indicators, baselines, targets and feasible evidence
Implementation feasibility	15%	Realistic WBS, schedule, responsibilities and dependencies
Budget/financial coherence	10%	Costs linked to activities and realistically estimated
Professional quality	10%	Clear, consistent, concise and well presented

15. Self-Check Questions

1. What distinguishes a project from routine operations?
2. Why does PCM begin with analysis rather than activities?
3. What is the difference between a need, a problem and a solution?
4. How do internal and external factors differ in SWOT?
5. Why should target groups be quantified and characterised?
6. What makes a stakeholder analysis useful for design rather than merely descriptive?
7. What is wrong with formulating 'lack of training' as a core problem?
8. How do you test a cause-effect relationship in a Problem Tree?
9. Why is the Objectives Tree not a purely mechanical inversion of the Problem Tree?
10. What is strategy analysis?
11. What is the difference between an activity, output, outcome and impact?
12. Why are baselines necessary?
13. What is the difference between an indicator and a target?
14. How are assumptions connected to risk?
15. What is vertical logic in a logframe? What is horizontal logic?
16. What is the purpose of a WBS?
17. Why should GANTT dates be driven by dependencies where possible?
18. What does RACI clarify?
19. Why should budgets be activity-based?
20. What is the difference between financial variance and financial mismanagement?
21. What procurement principles are especially important in publicly funded projects?
22. What makes a progress report analytical rather than descriptive?
23. How can OECD/DAC evaluation criteria improve project design before implementation?
24. Why can software not compensate for weak project logic?

16. Practice Cases

Case A — Training without a need analysis. An organisation proposes 20 entrepreneurship workshops because it has experienced trainers. No evidence is provided that the target group lacks entrepreneurship competence. Identify at least five design weaknesses and propose the analytical steps required before the activity can be justified.

Case B — Vague objective. A project objective states: 'Improve tourism in the region.' Rewrite the objective at an appropriate project level and propose two indicators, baselines, targets and sources of verification.
Case C — Schedule conflict. Procurement of equipment takes an estimated eight weeks, but the pilot using the equipment is scheduled to start four weeks after project launch. Identify the dependency problem and propose schedule and management responses.
Case D — Budget variance. At month six, only 35% of the training budget has been spent but 70% of planned participants have been trained. List possible interpretations and the evidence needed before deciding whether performance is positive or problematic.
Case E — Stakeholder resistance. A public authority has high influence but low initial interest in the project. Develop an engagement strategy that avoids both over-consultation and neglect.

PART VI. Evaluation Tools

Assessment combines formative and summative elements and evaluates both conceptual understanding and the ability to apply project-management tools.

Evaluation Type	Criteria and Methods	Weight in Final Grade
Continuous Assessment	Active participation, quality of intermediate project components and peer-review engagement completion of project application.	50%
Final Evaluation	Integrated Personal Project Portfolio and short presentation/defence of project logic.	50%

Final Evaluation Test

1. Which statement best describes Project Cycle Management?
A. A budgeting method
B. A framework linking analysis, design, implementation, monitoring and evaluation
C. A procurement procedure
D. A software package
2. A well-formulated project should begin primarily with:
A. A preferred activity
B. Available equipment
C. Demonstrated needs and contextual evidence
D. A fixed budget line
3. Which objective is closest to SMART formulation?
A. Improve skills
B. Organise training
C. By December 2026, at least 80 of 100 participating adults independently complete three defined digital public-service tasks
D. Support beneficiaries
4. In a results chain, an outcome is:
A. A resource used
B. A change resulting from uptake or use of outputs
C. A task performed
D. A procurement document
5. A baseline is:
A. The final target
B. The initial value of an indicator
C. A risk response
D. A budget ceiling
6. The WBS is primarily used to:
A. Decompose the project scope into manageable work
B. Rank stakeholders
C. Calculate exchange rates
D. Evaluate final impact
7. In RACI, Accountable means:
A. Receives information
B. Provides optional advice
C. Is ultimately answerable for completion/approval

D. Performs every task personally
8. A sound project budget should be:
A. Independent of activities
B. Based on activity and resource requirements
C. Built only after implementation
D. Limited to staff costs
9. Which is a fundamental procurement principle?
A. Preferential treatment
B. Informal selection
C. Equal treatment and transparency
D. Avoiding documentation
10. A progress report should connect:
A. Activities, results, indicators, expenditure, deviations and corrective action
B. Only expenditure
C. Only completed activities
D. Only stakeholder opinions

Self-check Answer Grid

1: B | 2: C | 3: C | 4: B | 5: B | 6: A | 7: C | 8: B | 9: C | 10: A

Final Integrative Reflection

Trace the project both forward and backward: Need → Problem → Objective → Results → Activities → Resources, and then Resources → Activities → Results → Objective → Problem/Need. Any broken link requires revision.

- Is the problem/need sufficiently evidenced and geographically specific?
- Are target groups numerically estimated and adequately characterised?
- Are final beneficiaries distinguished from direct target groups?
- Are objectives SMART and formulated as changes rather than activities?
- Do work packages, activities and results correspond to the intervention logic?
- Are indicators, baselines, targets and verification sources sufficiently explicit?
- Does the GANTT reflect dependencies and realistic sequencing?
- Are HR responsibilities and partner roles clear?
- Is the budget traceable to activities and resources?
- Are sustainability and reporting arrangements credible?

PART VII. Glossary

Activities	What needs to be done to achieve the outputs of a project, making use of human, technical and financial inputs.
Activity schedule	In an activity schedule a project's activities are broken down into operational detail. An activity schedule lays open dependencies between activities; clarifies the sequence, duration and precedence of activities; identifies key milestones to be achieved; serves as a basis for project monitoring; assigns management responsibility and implementing responsibilities.
Analysis of Objectives	Analysis of Objectives describes a future situation that will be achieved by solving the problems identified during problem analysis. During analysis of objectives potential solutions for a given situation are identified. This involves the reformulation of the negative aspects ("problems") identified during problem analysis into positive ones (envisioned for the future, i.e. desired but realistically achievable). The rationale of the reformulation is to derive the objectives directly from the actual existing problems identified and not from elsewhere.
Analysis Phase	During the analysis phase a profound analysis of an existing, undesired situation is carried out (Situation/ Problem analysis and Stakeholder analysis), from which the analysis of objectives is deducted (identifying means to end relationships) and the different potential strategies to be pursued within the framework of a project or programme are identified.
Assumptions	Assumptions are external factors that lie outside the control of a project but have to be attained in order to reach the project's objectives. They influence or even determine the success of the project. The aim of specifying assumptions (and pre-conditions) is to identify and assess potential risks to and dependencies of the project right from the initial stages of project design, to support the monitoring of risks during the implementation of the project and to provide a basis for necessary adjustments.
Cost	Cost are the financial resources needed to carry out the activities identified to pursue a project's objectives.
Objective	Responds to the question "Why do the project". The achievement of the objective is the project impact. Benefit for beneficiaries derived from outcomes
	There should be only one general project objective. Addditional SMART Objectives for WPs are formulated.
Horizontal logic	Within the horizontal logic of the logframe matrix indicators to measure progress and impact are specified and the sources or means by which the indicators will be verified.
Outcome	Changes in development conditions because of the output strategy and key assumptions Key components of the project objective.
Logical Framework Approach (LFA)	The LFA is an open set of tools for project design and management. It entails an evolutionary, iterative analytical process and a format for presenting the results of this process, which sets out systematically and logically the project or programme's objectives and the causal

	relationships between them, to indicate how to check whether these objectives have been achieved and to establish what external factors outside the scope of the project or programme may influence its success.
Logical framework matrix (logframe matrix)	The main output of the LFA is the logframe matrix. It is a format for presenting the results of the LFA as a process, and is developed on the basis of the LFA tools applied during the analysis phase. The logframe matrix serves as a summary of the key information on the project - it provides an easy overview that allows a quick assessment of the consistency and coherence of the project logic.
Means	Means are the human, material and service resources (inputs) needed to carry out planned activities and management support activities.
Milestones	Milestones define intermediate targets to be achieved and provide the basis for monitoring.
Objectively Verifiable Indicators (OVIs)	Objectively Verifiable Indicators (OVIs) are specific and objectively verifiable measures of change or of results as a consequence of project / programme activities. They provide the basis for performance measurement and are useful to convey to others what the project tries to achieve (transparency).
Objectives tree	The objectives tree is used as a tool for the Analysis of Objectives: within the "tree" the objectives are structured in a hierarchical order and the former cause–effect relationships between the key problems identified are turned into means–end relationships between objectives (what needs to be done to achieve what?).
Outputs	Specific products and services to be provided by the project to the project direct beneficiaries necessary for achieving the outcomes. Typically relate to reducing identified pressures or threats to the environment through capacity development, awareness raising, formulation and review of policies and legislation, fostering adoption of sustainable livelihoods, or the promotion of innovative financing mechanisms
Planning Phase	The planning phase encompasses the establishment of a logframe matrix on the basis of the LFA tools applied during the analysis phase, and subsequently the elaboration of activity and resource schedules.
Potential	In some organisations the analysis of potentials forms part of this initial analysis phase. It is meant to add to the picture of the problems in a given situation resources or opportunities (potentials) that might help to solve problems. Generally different types of available resources such as natural resources, capital, infrastructure and labour force and other kind of opportunities are considered to be potentials. They might later on be utilized to achieve objectives.
Pre-conditions	A pre-condition is like an assumption – that means it is an external factor that lies outside the control of a project but has to be attained in order to reach the project's objectives – only that it is a condition that must be fulfilled or met **before** project activities can start.
Problem Analysis	During problem analysis as part of the initial situation of an undesired situation that makes an intervention (project) necessary, the negative

	aspects of the existing situation are analysed. Key problems are identified and the causal relationship between them.
Problem tree	Drawing up a problem tree is the visual tool used within the LFA for clustering the problems identified during the initial situation analysis by establishing a hierarchy of causes and effects between them.
Project Strategy	The project strategy is displayed in the first column of the logframe matrix and displays what the project intends to achieve and how by clarifying the causal relationships between the different levels of objectives.
Resource schedule	Resource schedules provide the basis for the planned mobilisation of (external and local) resources. They facilitate results-based budgeting and the monitoring of cost-effectiveness. Resource schedules also identify cost implications, such as the requirement for counterpart funding.
Sources of Verification (SoVs)	Sources of verification (SOVs) describe where and in what form to find the necessary information on the achievement of objectives (indicators).
Stakeholder Analysis	Stakeholder analysis encompasses the identification and analysis of relevant stakeholders, their interests, problems, potentials, etc. It is important to start with stakeholder analysis at an early stage as part of the situation analysis in order to be able to integrate the stakeholders accordingly into the project design and management.
Strategy Analysis (Analysis of Alternatives)	The final stage of the analysis phase involves the identification of possible solutions that could form a project strategy and the selection of one or more strategies to be followed by the project. During strategy analysis (or "analysis of alternatives") a decision is being taken on which objectives **will** and which objectives **won't** be pursued within the frame of the project.
Vertical logic	Within the vertical logic of the logframe matrix the indicators to measure progress are specified and the sources/ means by which indicators will be verified are identified.

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Appendix A. Project Idea Screening Sheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Need/problem addressed	
Target group and estimated size	
Evidence available	
Strategic relevance	
Expected change	
Feasibility	
Key partners	
Main risks	
Decision: develop / revise / reject	

Appendix B. Needs Analysis Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Current situation	
Desired situation	
Gap/need	
Affected group	
Quantitative evidence	
Qualitative evidence	
Root causes	
Existing responses	
Remaining gap	

Appendix C. SWOT Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Strengths	
Weaknesses	
Opportunities	
Threats	
Strategic implications	

Appendix D. Stakeholder Analysis Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Stakeholder	
Interest/needs	
Influence/power	
Potential contribution	
Potential resistance	
Engagement strategy	

Appendix E. Problem Tree Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Core problem	
Direct causes	
Underlying causes	
Direct effects	
Wider effects	
Evidence/validation	

Appendix F. Objectives Tree Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Central objective	
Means	
Higher-level ends	
Excluded branches	
Selected strategy	

Trainer / peer feedback:

Appendix G. SMART Objective Checklist

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Specific	
Measurable	
Achievable	
Relevant	
Time-bound	
Revised objective	

Trainer / peer feedback:

Appendix H. Results and Indicators Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Result	
Indicator	
Baseline	
Target	
Source of verification	
Frequency	
Responsible	

Trainer / peer feedback:

Appendix I. Assumptions and Risk Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Assumption/risk	
Why important	
Probability	
Impact	
Response	
Owner	
Trigger	

Trainer / peer feedback:

Appendix J. WBS Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Work package	
Activity	
Task	
Deliverable	
Responsible	

Trainer / peer feedback:

Appendix K. GANTT Planning Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Activity	
Start	
Finish	
Duration	
Predecessor	
Milestone	
Responsible	

Trainer / peer feedback:

Appendix L. RACI Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Task/decision	
Responsible	
Accountable	
Consulted	
Informed	

Trainer / peer feedback:

Appendix M. Activity-Based Budget Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Activity	
Cost category	
Unit	
Quantity	
Unit cost	
Total	
Justification	

Trainer / peer feedback:

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Appendix N. Procurement Planning Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Need	
Specification	
Estimated value	
Procedure	
Timeline	
Responsible	
Documentation	

Trainer / peer feedback:

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Appendix O. Progress Reporting Worksheet

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Planned result	
Progress	
Indicator status	
Expenditure status	
Deviation	
Reason	
Corrective action	

Trainer / peer feedback:

Appendix P. Final Project Quality Checklist

Use this worksheet to document and review the relevant component of your Personal Project Portfolio.

Field	Participant notes
Relevance	
Target-group clarity	
Problem logic	
Objectives	
Results chain	
Indicators	
Schedule	
HR	
Budget	
Procurement	
Reporting	
Sustainability	

Trainer / peer feedback:

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Extended Case 1 — From Funding Opportunity to Genuine Need

A regional organisation discovers a call for proposals supporting digital transition. The first reaction is to propose a new platform. Apply PCM logic before accepting the solution. First, identify the population or organisations whose performance is expected to improve. Second, document the current situation using available evidence. Third, identify the underlying problems that prevent the desired performance. Fourth, review existing digital tools and initiatives to avoid duplication. Fifth, consult potential users and institutional stakeholders.

The project idea should only remain 'a platform' if analysis shows that lack of an appropriate digital infrastructure is a significant cause of the core problem. If the real causes are low competence, fragmented procedures, weak incentives or lack of trust, a platform alone may produce an output without generating an outcome.

Applied task: write two alternative project concepts for the same funding opportunity: one technology-led and one needs-led. Compare them using relevance, feasibility, expected outcome, stakeholder ownership and sustainability. Identify which assumptions would need to be tested before formulation.

Notes / application to my project:

Extended Case 2 — Quantifying the Target Group

A proposal states that the project will support 'young people in rural areas'. This description is insufficient for operational design. A project manager needs to know the geographical coverage, approximate population, age range, educational or employment status, barriers, existing services and intended reach.

Quantification affects almost every project component. Recruitment targets depend on the size and accessibility of the population. Budget assumptions depend on participant numbers and delivery model. Indicators require denominators. Communication channels depend on how the group can be reached. Equity analysis requires understanding whether some subgroups face stronger barriers than others.

Applied task: transform the phrase 'young people in rural areas' into a precise target-group profile. Include an estimated total population, eligibility criteria, intended direct participants, priority subgroups, recruitment channels and at least three evidence sources. Then identify what could go wrong if the estimate is inaccurate.

Notes / application to my project:

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Extended Case 3 — SWOT to Strategic Choice

A university department has strong subject expertise and international partnerships but limited administrative capacity for large projects. Externally, a new funding programme creates opportunities for cross-border training, while competition for experienced project staff is increasing.

A descriptive SWOT would simply list these four elements. A strategic SWOT asks what they mean for project design. The department could use its expertise and partnerships to pursue the opportunity, but only if administrative capacity is strengthened or shared with a partner. It could reduce exposure to the staffing threat by defining backup roles, documenting procedures and budgeting for project support.

Applied task: develop four strategic responses: Strength–Opportunity, Weakness–Opportunity, Strength–Threat and Weakness–Threat. For each response, specify one project-design implication and one risk-management implication.

Notes / application to my project:

Extended Case 4 — Stakeholder Conflict

A heritage-tourism project seeks to increase visitor numbers, but residents are concerned about congestion and loss of local character. Tourism businesses favour rapid promotion; the municipality wants economic growth; heritage specialists prioritise conservation.
Stakeholder analysis should make these interests visible before objectives are fixed. A project designed only around visitor growth may be relevant to businesses but unacceptable to residents and potentially harmful to heritage. The intervention may need to redefine success around managed visitor flows, local value creation, conservation and resident acceptance.
Applied task: map the stakeholders by power and interest. Identify potential alliances and conflicts. Propose an engagement strategy for each major group. Then reformulate the project objective so that it reflects a balanced and sustainable outcome rather than a single stakeholder's preference.

Notes / application to my project:

Extended Case 5 — Building a Causal Problem Tree

A municipality reports 'low participation in cultural events'. Possible causes include weak information, programme mismatch, ticket prices, transport barriers, inconvenient timing, accessibility limitations and low trust. Effects may include reduced cultural participation, weaker community interaction and inefficient use of public cultural infrastructure.
The analytical challenge is to distinguish direct causes from deeper causes. 'Weak information' may itself result from fragmented communication responsibilities and lack of audience data. 'Programme mismatch' may result from limited consultation and outdated programming practices.
Applied task: build a three-level Problem Tree. For each causal arrow, write one sentence explaining why the relationship is plausible and identify evidence that could confirm or challenge it. Mark causes that are within the project's influence and causes that require complementary interventions.

Notes / application to my project:

Extended Case 6 — Selecting a Realistic Strategy

An Objectives Tree contains branches related to skills, infrastructure, financing, regulation and public awareness. The project consortium has expertise in training and stakeholder facilitation but no mandate to change national regulation and insufficient budget for major infrastructure.
Strategy analysis requires deliberate exclusion. The project may address skills and coordination while treating regulation and infrastructure as assumptions, advocacy topics or areas for referral. Excluding an important branch does not mean it is unimportant; it means the project is respecting its sphere of influence.
Applied task: score each branch against relevance, mandate, competence, cost, time, stakeholder support, risk and expected contribution. Select the intervention strategy and write a short justification explaining both what is included and what is deliberately excluded.

Notes / application to my project:

Extended Case 7 — SMART Without Losing Strategic Meaning

Teams sometimes make objectives 'SMART' by adding numbers without clarifying the intended change. 'Train 200 people by December' is measurable and time-bound, but it describes an output, not necessarily an outcome. A better objective asks what should change because of training.
For example: 'By December, at least 70% of participating frontline staff demonstrate competent use of the new case-management procedure in routine work.' The number trained can remain an output indicator, while application becomes an outcome indicator.
Applied task: rewrite five activity-based statements as outcome-oriented objectives: organise workshops; create a website; purchase equipment; establish a network; publish a guide. For each, identify an output and an outcome indicator.

Notes / application to my project:

Extended Case 8 — Indicator Design

An indicator must represent the result it is intended to measure. Satisfaction is not the same as learning; attendance is not the same as behaviour change; number of downloads is not the same as use.
Indicator design begins by clarifying the construct. If the result is 'improved capacity to prepare project budgets', evidence might include performance on a practical budgeting task, error rates in submitted budgets or quality-review scores. A satisfaction survey can complement but should not substitute for competence evidence.
Applied task: choose one project outcome and propose three candidate indicators. Evaluate each for validity, reliability, feasibility, sensitivity to change and cost of data collection. Select the strongest indicator and define baseline, target, frequency and source.

Notes / application to my project:

Extended Case 9 — Assumptions and Killer Assumptions

Suppose a project trains unemployed adults for occupations in a sector that is expected to hire. The causal logic depends on employers actually having vacancies and accepting the competence acquired. If the labour market contracts sharply, the outcome may not occur despite high-quality training.
An assumption becomes critical when it is important to success and outside project control. If it is very unlikely to hold and cannot be influenced, it may be a killer assumption: the strategy should be reconsidered.
Applied task: identify five assumptions for a selected project. Rate importance and probability. For high-importance/low-probability assumptions, decide whether to redesign, mitigate, monitor or accept. Convert at least two assumptions into explicit risks with triggers.

Notes / application to my project:

Extended Case 10 — WBS Completeness

A project schedule contains technical activities but omits project management, procurement, monitoring, communication and reporting. The apparent schedule is therefore incomplete even if technical tasks are well sequenced.
The WBS should cover 100% of the agreed scope. Support and governance work consume real time and resources. Omitting them produces unrealistic staffing and budget assumptions.
Applied task: review a project idea and build a WBS with at least five work packages. Include management, monitoring/evaluation and communication where appropriate. For each work package, identify one deliverable and acceptance criterion.

Notes / application to my project:

Extended Case 11 — Dependency Logic

A training pilot is scheduled before the curriculum has been approved and before trainers are contracted. The dates look possible when viewed independently, but the dependency logic makes the plan impossible.
Scheduling should therefore begin with relationships, not calendar decoration. Identify which tasks genuinely depend on others and which can run in parallel. Then estimate duration and constraints.
Applied task: take ten activities from your project and define predecessor relationships. Identify at least two opportunities for parallel work and two points where a delay would propagate. Mark milestones and explain which one deserves management attention.

Notes / application to my project:

Extended Case 12 — Human Resource Capacity

A proposal names highly qualified experts but allocates very little time to them. Another team member is assigned simultaneously to project management, financial administration, procurement and technical delivery. The plan may look economical but is operationally fragile.
Human-resource planning should consider competence, availability, workload, continuity and decision authority. Responsibility matrices help expose concentration of duties and unclear accountability.
Applied task: estimate person-days for five major activities. Compare required workload with actual availability. Use RACI to identify any task with no accountable role, multiple accountable roles or excessive consultation. Propose corrections.

Notes / application to my project:

Extended Case 13 — Activity-Based Budgeting

A budget contains round figures such as 'Training: €20,000' and 'Communication: €10,000' without units or assumptions. Such a budget is difficult to assess and difficult to manage.
Activity-based budgeting makes the calculation transparent: number of trainer days × daily rate; number of participant kits × unit cost; number of travel journeys × average cost. Transparency supports value-for-money assessment and later variance analysis.
Applied task: select one work package and build a detailed cost model. State units, quantities, unit costs and calculation. Then conduct a sensitivity test: what happens if participant numbers increase by 20% or unit prices rise by 10%?

Notes / application to my project:

Extended Case 14 — Procurement as a Schedule Risk

A project requires specialised equipment in month three. The team assumes procurement can be completed in two weeks, but applicable procedures require specification, approval, competition, evaluation, contracting and delivery. Procurement is therefore both a compliance process and a scheduling process. The GANTT should include procurement steps and realistic lead time.
Applied task: create a procurement timeline from need identification to acceptance of goods/services. Identify documents required at each stage. Add the timeline to the project schedule and analyse the effect of a four-week delay.

Notes / application to my project:

Extended Case 15 — Reporting Results, Not Activities

A progress report states that the project organised six meetings, produced three documents and held four workshops. This information demonstrates activity but does not explain performance.
A results-oriented report compares actual achievement with plan and target. It interprets indicator data, explains deviations, identifies lessons and proposes corrective action. It also connects expenditure with physical progress.
Applied task: rewrite an activity-only report paragraph into a results-oriented paragraph. Include target versus actual, evidence, one deviation, explanation and corrective action.

Notes / application to my project:

Extended Case 16 — Sustainability Before the Final Month

A project creates a new service but only asks who will maintain it during the final month. No organisation has formally accepted responsibility and no recurrent budget exists.
Sustainability should be designed from the beginning. Institutional ownership, financing, skills, maintenance, governance and demand must be considered during formulation.
Applied task: prepare a sustainability plan for one output. Address institutional ownership, financial continuation, staff competence, technical maintenance, stakeholder demand and handover. Identify which sustainability actions must start during the first half of implementation.

Notes / application to my project:

Extended Case 17 — Evaluation Questions

The OECD/DAC criteria can be converted into useful management questions. Relevance: are needs and priorities still the same? Coherence: does the project complement or duplicate other interventions? Effectiveness: are intended results being achieved? Efficiency: are resources and time being used well? Impact: what broader difference is emerging? Sustainability: are benefits likely to continue?
Applied task: formulate two evaluation questions under each criterion for your project. Identify the evidence required and when it could realistically be collected. Note which questions can already be used during monitoring rather than waiting for final evaluation.

Notes / application to my project:

Extended Case 18 — Final Coherence Audit

A final project review should trace the logic in both directions. Start from the budget and ask which activities justify each cost. Start from each activity and ask which output it produces. Start from each output and ask which outcome it enables. Start from the outcome and ask which problem it addresses. Then reverse the sequence.
This audit often reveals orphan activities, unfunded tasks, indicators without data sources, objectives without sufficient results, and stakeholder needs that disappeared during planning.
Applied task: conduct a red-team review of your Personal Project Portfolio. Identify at least ten inconsistencies or questions a critical evaluator might raise. Prioritise them by severity and revise the project accordingly.

Notes / application to my project:

PART VII. Integrated Trainer Handouts and Extended PCM Notes

This part integrates the trainer-developed handouts used in the course with the main course notes. The original terminology and teaching logic are retained where possible, while the explanations are aligned with the European Commission Project Cycle Management / Logical Framework Approach used throughout the manual.

17. Target Group and Final Beneficiaries

A clear distinction between the target group and final beneficiaries is essential for defining project relevance, intervention logic and indicators. The target group consists of the specific individuals, organisations or entities that the project directly engages with and that receive immediate project products, services, training or support. Final beneficiaries are the individuals, groups, organisations or communities that ultimately experience the wider or longer-term positive effects of the project, even when they do not participate directly in project activities.

Dimension	Target Group	Final Beneficiaries
Relationship to project	Direct involvement	Indirect involvement
Timing of benefit	Immediate / short-term	Medium to long-term
Participation in activities	Usually active	Usually no direct participation
Link to project logic	Outputs and outcomes	Impact / overall objective
Measurement focus	Participation, skills gained, behaviour change	Socio-economic improvement, systemic change

Simple PCM logic: Activities -> Outputs -> Outcomes -> Impact. The target group primarily benefits at output/outcome level, while final beneficiaries are primarily associated with the broader impact level.

Practical rule: "Who do we work WITH directly?" identifies the Target Group. "Who benefits BECAUSE the project succeeds?" identifies the Final Beneficiaries.

Example – Digital skills training for unemployed youth. Target group: 100 unemployed young people attending training. Final beneficiaries may include their families, local employers gaining a more skilled workforce, the local economy through increased employment, and the community through reduced unemployment.

Source / integration note: Trainer handout "Target Group & Final Beneficiaries".

Key Differences

Dimension	Target Group	Final Beneficiaries
Relationship to project	Direct involvement	Indirect involvement
Timing of benefit	Immediate / short-term	Medium to long-term
Participation in activities	Yes, usually active	Usually no direct participation
Link to project logic	Outputs & outcomes	Impact / overall objective
Measurement focus	Participation, skills gained, behaviour change	Socio-economic improvement, systemic change

Simple PCM Logic

Activities → Outputs → Outcomes → Impact

- **Target Group** → primarily benefits at the **output/outcome** level
- **Final Beneficiaries** → primarily benefits at the **impact** level

Example.

Project: Digital skills training for unemployed youth

Target Group:
- 100 unemployed young people attending training

Final Beneficiaries:
- families of participants
- local employers gaining skilled workforce
- local economy through increased employment
- community through reduced unemployment

"Who do we work WITH directly?" → Target Group
"Who benefits BECAUSE the project succeeds?" → Final Beneficiaries

This distinction is standard in **EU Project Cycle Management / Logical Framework methodology**.

18. Stakeholder Identification, Analysis and Management

Stakeholder management is a continuous project-management process rather than a one-off list produced during formulation. Its purpose is to identify persons, groups and organisations that can influence the project or are affected by it, analyse their interests and power, and define measures that strengthen positive influence and reduce avoidable resistance.

18.1 Identification

- Who can influence the project?
- Who is involved in the project?
- Who is affected by project implementation or results?
- Who has an interest in the outcome?
- Who may support the project and who may oppose it?

Typical categories used in the trainer materials include project beneficiaries, target groups, decision factors/decision-makers, financing bodies, agencies, partners and opponents of the project. Stakeholder identification should result in a structured list that becomes the input for analysis.

18.2 Detailed analysis

Stakeholder	Description	Strengths / resources	Weaknesses / constraints	Relation to project	Attitude	Influence / power	Management response

Key analytical questions from the handouts are: Is the stakeholder an opponent or supporter? How strongly is the stakeholder affected? What expectations and requirements does the stakeholder have? What influence and power can the stakeholder use?

18.3 Stakeholder management as a cycle

The stakeholder-management handout describes a continuous cycle of identification, analysis, control and monitoring. As the project develops, stakeholder attitudes, interests and influence can change. Consequently, the stakeholder portfolio and communication measures should be reviewed whenever project conditions or the intervention logic change.

Expected outputs include: a stakeholder list; analytical evaluation of attitude and influence; stakeholder portfolio; stakeholder-management measures; communication plan; and information relevant to risk assessment.

Source / integration note: Trainer materials “Stakeholder Management”, “Stakeholder Analysis”, and the Project Management PPT handout; consistent with EC PCM guidance that stakeholder analysis is iterative and should remain a continuous reference during analysis and design.

19. Problem Tree and Objective Tree

19.1 Problem Tree: cause-effect logic

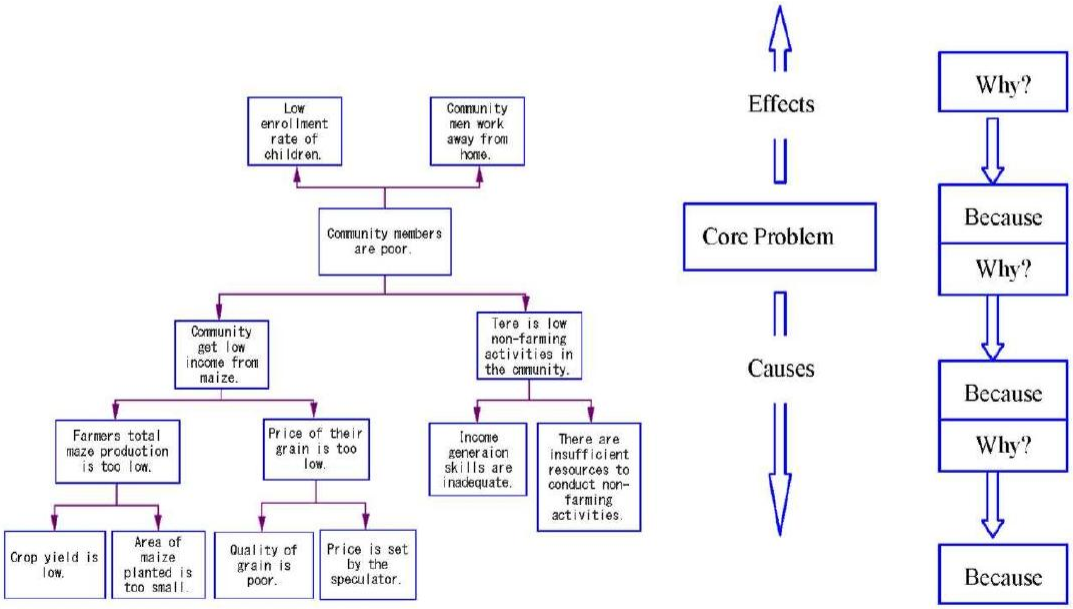
The Problem Tree structures a problem situation around a focal or core problem. Effects are placed above the core problem and causes below it. The trainer handout uses the repeated question “Why?” to move downward from the core problem toward deeper causes and “Because” to test the causal chain.

- Identify major problems existing within the stated problem situation.
- Agree upon a core or focal problem.
- Analyse the causes of the core problem and the effects of the core problem.
- Form a diagram showing cause-and-effect relationships as a Problem Tree.

Formulation rules used in the course: write existing causes; place only one clearly formulated idea on each card; formulate problems negatively; and avoid defining a problem simply as “there is no …”, because this often embeds a preferred solution rather than describing the actual negative situation.

Handout “Problem Tree and Objective Tree”

Structure of Problem Tree



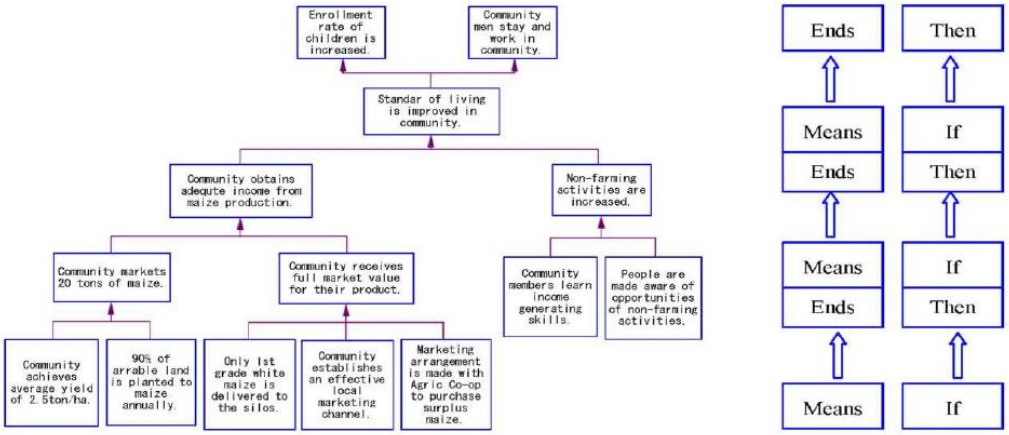
19.2 Objective Tree: means-ends logic

Objective Analysis converts the negative current situation described in the Problem Tree into a desirable future situation. Problems are reformulated as positive, realistic achievements. The relationships are then tested as means-ends relationships. A lower-level objective is a means contributing to the objective above it and, at the same time, an end supported by objectives below it. This can be read as “if-then” logic: if lower-level objectives are achieved, then achievement of higher-level objectives becomes more plausible.

- Restate negative Problem Tree statements as positive situations that are desirable and realistically achievable.
- Examine the resulting means-ends relationships for validity and completeness.
- Revise statements where necessary.
- Add objectives that are logically necessary but missing.
- Delete objectives that are irrelevant, unrealistic or outside the intended intervention.

Handout “Problem Tree and Objective Tree”

Structure of Objective Tree



2. Examine the means and ends relationships thus derived to assure validity and completeness of the diagram. If necessary, revise statements, add new objectives, and delete objectives

20. Key Logical Framework Approach Principles from the EC PCM Guide

20.1 Analysis is iterative

Stakeholder analysis and problem analysis should be conducted in tandem rather than treated as isolated sequential exercises. Stakeholder analysis remains a point of continuous reference throughout the Logical Framework Approach and should be reconsidered when the Logframe is revised, because the stakeholder landscape evolves over time.

20.2 Strategy analysis

After stakeholder, problem and objective analysis, the team must decide which objectives and branches will become part of the project strategy. Relevant questions include whether all problems should be addressed, which positive opportunities from SWOT can be built on, which combination of interventions is most likely to produce sustainable benefits, how ownership and institutional capacity can be strengthened, what costs can realistically be afforded, which options are cost-effective, and how negative environmental or social effects can be avoided.

20.3 Objective hierarchy and intervention logic

The project purpose should express a higher-level consequence of the project results rather than simply restating the sum of those results. Results should be necessary and sufficient, together with assumptions, to make achievement of the purpose plausible. Activities should be clearly linked to results, and larger projects may group related results, activities and inputs into components or strategies.

20.4 Assumptions

Assumptions are external factors that can influence or determine project success but lie outside the direct control of project managers. They form part of the vertical logic: activities plus assumptions contribute to results; results plus

assumptions contribute to the project purpose; purpose plus assumptions contribute to the overall objective. Preconditions are conditions that need to be met before resources are committed and activities begin.

20.5 Indicators and Sources of Verification

Indicators and sources of verification should be designed together. A source of verification should specify how information will be collected or where it already exists, who will provide or collect it, and when/how regularly it will be available. Existing information systems should be used or strengthened where feasible before creating parallel systems. If an indicator is too expensive or complex to measure, a simpler or proxy indicator may be preferable.

Source / integration note: European Commission, Project Cycle Management Guidelines (2004), as reproduced in the uploaded LFA handout.

21. PCM Work Stages Used in the Training

The trainer PPT organises the applied PCM design process into the following work stages. They provide a useful workshop sequence and complement the formal project-cycle stages:

- Step 1. Situation analysis and stakeholder analysis
- Step 2. Problem analysis (Problem Tree)
- Step 3. Strategy analysis
- Step 4. Objectives identification
- Step 5. Project planning
- Step 6. Activity planning
- Step 7. Resource planning

These stages should be treated iteratively. New information can require the team to return to an earlier analysis and revise the project logic.

Source / integration note: Project Management PPT handout developed/used by Carmen Chasovschi.

22. Applied Case: Critical Review of a Project Application Form

The uploaded project application form can be used as a transversal training case. Participants should not treat it as a perfect model; instead, they should review it critically against the PCM quality criteria developed in this course.

- Is the problem/need sufficiently evidenced and geographically specific?
- Are target groups numerically estimated and adequately characterised?
- Are final beneficiaries distinguished from direct target groups?
- Are objectives SMART and formulated as changes rather than activities?
- Do work packages, activities and results correspond to the intervention logic?
- Are indicators, baselines, targets and verification sources sufficiently explicit?
- Does the GANTT reflect dependencies and realistic sequencing?
- Are HR responsibilities and partner roles clear?
- Is the budget traceable to activities and resources?
- Are sustainability and reporting arrangements credible?

Source / integration note: Uploaded LIFECED Project Management Application Form used as a practical case for quality review.

Appendix R. Target Group & Final Beneficiaries

The original comparison page is reproduced below for direct participant use.

Key Differences

Dimension	Target Group	Final Beneficiaries
Relationship to project	Direct involvement	Indirect involvement
Timing of benefit	Immediate / short-term	Medium to long-term
Participation in activities	Yes, usually active	Usually no direct participation
Link to project logic	Outputs & outcomes	Impact / overall objective
Measurement focus	Participation, skills gained, behaviour change	Socio-economic improvement, systemic change

Simple PCM Logic

Activities → Outputs → Outcomes → Impact

- **Target Group** → primarily benefits at the **output/outcome** level
- **Final Beneficiaries** → primarily benefits at the **impact** level

Example.

Project: Digital skills training for unemployed youth

Target Group:
- 100 unemployed young people attending training

Final Beneficiaries:
- families of participants
- local employers gaining skilled workforce
- local economy through increased employment
- community through reduced unemployment

"Who do we work WITH directly?" → Target Group
"Who benefits BECAUSE the project succeeds?" → Final Beneficiaries

This distinction is standard in **EU Project Cycle Management / Logical Framework methodology**.