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Project Management Workshop Report

15th -18th September, New Delhi

Submitted by:

MCH-STAR Initiative Prime Partners

Emerging Markets Group, Ltd.

Boston University

The Centre for Development and
Population Activities (CEDPA)





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BRIEF BACKGROUND

This workshop was a continuation of efforts to strengthen the capacity of SSIs in managing projects related to research, evaluation, technical assistance, policy and advocacy. The rationale for this workshop was based on following :

- Research, technical assistance, and other types of public health projects may be complex in structure and scope. Therefore such projects require careful management with formal planning activities
- Need for capacity building in project planning, monitoring and evaluation
- Projects may require networking and partnerships

PURPOSE / OVERALL AIM

The overall aim was capacity building/ strengthening of SSIs for technical and financial management of projects related to research, evaluation and technical assistance. The workshop had following goals:

- To strengthen skills of public health researchers and project managers in the areas of organization and management of projects, and successful completion and reporting of project activities
- To develop necessary project planning and evaluation tools



OBJECTIVES

1. Consider and understand the value of planning
2. Strengthen skills in project planning and evaluation
3. Develop elements necessary for project success during group work

NAME(S) OF FACILITATOR(S)

- Dr. Davidson Hamer and Abanish Rizal from Boston University
- Dr. Ashok Patwari, Dr. Marta Levitt-Dayal, Dr. Sanjay Kumar and Dr. Avinash Ansingkar from MCH-STAR



SESSIONS

I. Program Management – What works and what does not?

Dr. Marta Levitt-Dayal described essential elements for successful projects, defined a successful project, introduced essential project management 'tool kit', highlighted qualities, roles and skills of the Project Manager, cautioned against 15 common mistakes and finally shared lessons from successful and troubled projects. This session kick started a practical approach towards successful project management.

II. Project Management - Overview and Good Practices:

Dr. Ashok Patwari presented an overview of project management highlighting the definition and components of project life cycle (project initiation, planning, execution and closure). The presentation was followed by group work by Project Teams on worksheets (on *goals, objectives, proposed activities, anticipated challenges/ risk assessment, expected outcome*)

"Good practices for Project Management" included Project Planning for end results (Presenter: Dr. Avinash Ansingker), Ethical clearance (Dr. Davidson Hamer), Obtaining formal buy-in from the clients (Dr. Ashok Patwari) and Training of study team in ethics and systematic data collection (Dr. Davidson Hamer)

III. Developing a work breakdown structure

Dr. Ashok Patwari described project work break down structure (main steps, activity, task, sub task, terminal event) defining sequence of events, setting duration and timelines and defining milestones. He also discussed about allocation of resources and presentation of the plan. His presentation was followed by group work in which project teams outlined work break down structure of their respective projects.

IV. Human resources

Abanish Rizal talked about developing scopes of work/job descriptions, hiring personnel and planning for supervision. His presentation was followed by group work on developing a work breakdown structure and writing job descriptions for personnel for their projects.

V. Rationale for and components of a project manual :

Dr. Davidson Hamer described the rationale, potential impact and considerations while developing a project manual. He also highlighted the importance of components, indicators, deliverables and quality control measures pertaining to project manual. His presentation was followed by group work by the participants on developing a project manual including data management plan.



VI. *Planning for Project Implementation Instruments :*

The session started with brainstorming, moderated by Dr. Ashok Patwatri, about various instruments which the investigators intend to use in their proposed projects e.g. check lists, guidelines, flow charts, questionnaire etc. It was followed by a brief presentation by Dr. Davidson Hamer on principles of developing instruments.

VII. *Planning for Quality Management*

Dr. Avinash Ansingker began the session with a presentation on Project Quality Management. This was followed by an interactive discussion on “*Setting quality criteria for deliverables*”, moderated by Dr. Sanjay Kumar. The participants were asked to list out the deliverables pertaining to their projects. Quality management of qualitative and quantitative data was presented respectively by Dr. Ashok Patwari and Dr. Sanjay Kumar.

VIII. *Monitoring project progress*

Presentations by Dr. David Hamer and Abanish Rizal on routine supervision, communication, comprehensive site visits, etc. were followed by group work on planning for project initiation and monitoring of project progress.

Managing change/Trouble shooting/Problem solving

The participants were sensitized to ‘how to respond to anticipated and unanticipated events during the life of a project.

IX. *Project reporting, planning for publications*

Dr. Davidson Hamer talked about various issues related to authorship and data entry, and used one of his Authorship agreements as an example.

Definitions

In order to have a common understanding of terminology, Dr. Marta Levitt-Dayal reinforced various definitions like activities, tasks, deliverables, milestones etc.

X. *Group work on developing Final Detailed Implementation Plan*

After initial briefing by Dr. Marta Levitt-Dayal, the project teams worked on their Final DIPs and presented their DIPs in the plenary session.

XI. *Introduction to Financial Management Project initiation, procurement and closure*

Sameer Wadhwa introduced financial management to the project teams. Panchmani Vincent talked about purchasing supplies, sub-contracts and MOUs, and project closure. It was followed by group work on a differential/cost analysis problem set.

XII. *Introduction to cost analysis and differential costs*

Abanish Rizal and Sameer Wadhwa described the objectives of Cost Analysis and Differential Costs, Identification of Cost “Drivers”, Types of Costs and Cost Analysis, Uses for Differential Cost Analysis and Break-even analysis.



XIII. Budget principles/Steps in developing a budget/ Budget Tracking

Abanish Rizal introduced the concept of planning and budgeting. He briefly discussed about stages of budgeting, grantee contribution, monitoring and evaluation of budget.

XIV. Financial Review, Financial and Progress Reporting

Sameer Wadhwa and Abanish Rizal talked about pre-award assessment and post-award financial reviews, special award conditions, mutual benefits of financial review, cost share and financial review reports.

XV. Marking and Branding

In the last session of the workshop Dr. Marta Levitt-Dayal briefly discussed branding requirements, how to brand, co-branding, marking plans, reports and signages.

HIGHLIGHTS :

Participants got 'hands on' experience on work break down structure in a step-wise fashion on their own concept papers under the guidance of facilitators from Boston University and MCH-STAR. They were able to develop a detailed implementation plan (DIP) for their respective projects.

CHALLENGES:

Since the selected projects were still not ready for launching, some important activities of the workshop could not be internalized by the participants. However, getting sensitized to almost the important technical and financial aspects of project management can still be considered as an investment for successful execution of these projects as well as for future.



all

OUTPUT:

The major output of this workshop included:

- Draft work breakdown structure developed
- Draft job descriptions for project personnel prepared
- Draft project manual (SOP) developed
- Detailed plan for project implementation developed
- Detailed plans for monitoring of project progress developed

NEXT STEPS



The participants felt that they would like to remain in touch with Dr. Davidson Hamer, Abanish Rizal and Sameer Wadhwa through email for any assistance pertaining to technical and/ or financial management of their projects.

SUMMARY OF EVALUATION

Workshop evaluation by the participants was as follows:

- The contents of the presentations were considered excellent (27%), very good (35%), good (36%) and below expectation (2%).
- Presentation by the speakers was considered excellent (24%), very good (55%), good (20%) and below expectation (1%).
- Group work was reported as extremely useful (51%), useful (23%) and useful to some extent (26%)



ATTACHMENT 1: AGENDA

PROJECT MANAGEMENT WORKSHOP NEW DELHI SEPTEMBER 15-18, 2008

Day 1 - Monday (September 15)

09:00 – 09:15 Welcome and Introduction of participants
Presenter: Marta Levitt-Dayal

09:15 – 09:40 Introduction to the workshop objectives
Presenter: David Hamer

09:40 – 10:00 Program Management – What works and what does not ?
Presenter: Marta Levitt-Dayal

10:00 – 10:45 Project Management - Overview
Presenter: Ashok Patwari

10:45 – 11:00 Tea break

11:00 – 11:20 Group work by Project Teams

11:20 – 11:50 Brief presentation of proposed projects by Project Teams

11:50 - 13:30 Good practices for Project Management

- Project Planning for end results (*Presenter: Avinash*)
- Ethical clearance (*Presenter: David Hamer*)
- Obtaining formal buy-in from the clients (*Presenter: Ashok Patwari*)
- Training of study team in ethics and systematic data collection
(*Presenter: David Hamer*)

13:30 – 14:30 Lunch break

14:30 – 15:30 Developing a work breakdown structure
Presenter: (Ashok Patwari)

15:30 – 16:00 Group Work : Project Teams outline work break down structure of the Projects

16:00 – 16:15 Tea break

16:15 – 16:45 Human resources
Presenter: Abanish Rizal

16:45-17:30 Group work: Teams work on developing a work breakdown structure and writing job descriptions for personnel



Day 2 - Tuesday (September 16)

09:00 – 09:30 Review of human resources planning and work structure

Presenters: Ashok Patwari/David Hamer/Abanish Rizal

09:30 – 11:00 Rationale for and components of a project manual

Presenter: David Hamer

11:00 – 11:15 Tea break

11:15 – 12:30 Planning for Project Implementation Instruments

- Development of instruments
- Pilot testing instruments

Presenters: David Hamer/Ashok Patwari

12:30 – 13:30 Lunch break

13:30 – 14:45 Planning for Quality Management

- Project Quality Management: Overview (*Presenter: Avinash*)
 - Setting quality criteria for deliverables (*Presenter: Sanjay*)
 - Ensuring quality data management
(*Presenter: Ashok*)
- Qualitative data
Quantitative data (*Presenter: Sanjay*)

Presenters: Avinash, Sanjay, Ashok

14:45– 15:45 *Group work: Development of project manual*

15:45– 16:00 Tea break

16:00 – 17:00 Continued work on developing project manual including data management plan

17:00 – 18:00 Teams briefly present project manual and discuss steps needed for its completion

Day 3 - Wednesday (September 17)

09:00-09:45 Teams briefly present project manual and discuss steps needed for its completion

09:45-10:30 Monitoring project progress

10:30 -11:45 Group work on planning for project initiation and monitoring of project progress

(Tea break during the Group work)

11:45- 12:00 Managing change

Presenter: Avinash

12:00- 13:00 Trouble shooting/Problem solving



Presenter: David Hamer/Marta Levitt-Dayal/ Abanish Rizal

13:00 - 14:00 Lunch break

14: 00 -14:30 Project reporting, planning for publications

Presenter: David Hamer

14:30 – 14:45 Definitions

Presenter: Marta Levitt-Dayal

14:45 – 14:50 Briefing for the Group work

Presenter: Marta Levitt-Dayal

14:50 – 17:00 Group work on developing Final Detailed Implementation Plan by
Project Teams

*(Teams work with David Hamer/Ashok Patwari/Abanish Rizal/ Sanjay/
Avinash)*

(Tea break during the Group work)

17:00-1800 Presentation of Final DIP by Project teams- *Plenary Session*

Moderators: Marta Levitt-Dayal, David Hamer, Ashok Patwari

Day 4 - Thursday (September 18)

09:00 – 9:15 Introduction to Financial Management

Presenter: Abanish Rizal

09:15 -10:00 Project initiation, procurement and closure

- Purchasing supplies
- Sub-contracts and MOUs
- Project Closure

Presenter: Panchmani Vincent

10:00 -11:45 Groups work on a differential/cost analysis problem set and discussion

Abanish Rizal/Sameer Wadhwa will walk groups through the problem set

(Tea Break during the Group Work)

- Discussion

11:45: -12:30 Introduction to cost analysis and differential costs

Presenter: Abanish Rizal/Sameer Wadhwa

12:30 -13:30 Lunch Break

13:30 - 14:15 Budget principles/Steps in developing a budget/ Budget Tracking

Presenter: Abanish Rizal/Sameer Wadhwa

14:15 – 14:45 Financial Review

Presenter: Sameer Wadhwa/ Abanish Rizal

14: 45 -15:00 Financial and Progress Reporting

Presenter: Sameer Wadhwa & Marta Levitt-Dayal



15:00 - 15: 15 Tea break

15: 15 -15:30 Marking and Branding
Presenter: Marta Levitt-Dayal

15:30- 16:00 Assessment and Wrap up and questions



ATTACHMENT 2: LIST OF PARTICIPANTS

MCH- STAR Project Management Workshop
September 15-18, 2008

New Delhi

List of Participants (15-18 September, 2008)

S.No.	Name of the participant	Organization	Email ID
1.	Dr. Kiran Goswami	IndiaCLEN	
2.	Ms.Vaishali Deshmukh	IndiaCLEN	
3.	Mr. Dabender Biswal	IndiaCLEN	
4.	Dr. Puneeta Mahajan	IndiaCLEN	
5.	Mr. Beathuel M	IndiaCLEN	
6.	Dr. Srabasti Basu	IndiaCLEN	
7.	Dr.Lalitendu Jagatdeb	PFI	
8.	Mr. Nihar Ranjan Mishra	PFI	
9.	Dr.Sanghita Banerjee	PHFI	
10.	Dr.Rajmohan Panda	PHFI	
11.	Dr. Manu Mathur	PHFI	
12.	Ms.Neha Khandpur	PHFI	
13.	Ms.Nandita Bhan	PHFI	

List of Participants for 18th September, 2008

1.	Nanda Kumar	PHFI	
2.	Rakesh Singh	IndiaCLEN	
3.	Ms Hariett	IndiaCLEN	
4.	CSN Murthy	PFI	

