

TRAINING CURRICULUM

PROJECT MANAGEMENT

*“ComPM – Competences Framework for European Project Managers” project
implemented by Polska Fundacja Ośrodków Wspomagania Rozwoju Gospodarczego “OIC Poland”
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Module I	PROJECT FRAMEWORK
Specialisation	Project Manager
Target learners	EU funded project managers Potential project managers Trainers
Pre-requisites	Language: Professional English (only for international project managers) Knowledge of European Policies and Strategies and funding Programmes
Objectives of the module	<p>This module is focused on that phase of a project cycle called “Identification”. Identification is the phase in which the project is scoped, i.e. its cornerstones are defined. These will include aims, beneficiaries, outcomes, main activities and resources, as well as stakeholders and feasibility analysis. It is a common misunderstanding that “Identification” is something to be done exclusively in the preparation phase of a project. It remains an essential task of project management through the project’s lifetime. In the start up phase of the project, initial plan needs to be reviewed and adjusted (i.e. times frames and people involved might have changed; a budget resizing can lead to a new negotiation with stakeholders and can request new feasibility analysis). In the implementation phase the original plan needs to be constantly refined and adapted according to the results of monitoring and evaluation as well as to possible changes in the external environment affecting project’s impacts. At the end of the project, when its <i>afterlife</i> starts, “identification” helps to capitalize results, to strategically strengthen partnership and to identify how multiplying impacts.</p> <p>In order to achieve comPM training curriculum general purpose, the objectives of this module will be:</p> <ul style="list-style-type: none"> • Objective 1 – To offer to EU project managers’ an overview on EU funding opportunities and main rules (Multiannual financial framework 2014-2020); • Objective 2 – To improve EU project managers’ technical skills in the use of the Logical Framework Approach to analyse the problems, work out suitable solutions and successfully implement them within the framework of EU funded projects; • Objective 3 – To develop EU project managers’ soft skills in identifying and involving key internal and external stakeholders as much as possible;

	<ul style="list-style-type: none"> Objective 4 – To provide EU project managers with tips and tools enabling them to transform a first idea in a project and check its feasibility. 	
<p>Overview Targeted Competencies</p>	<p>Professional competence: Project environment</p> <p>Individual competence: Problem-solving</p> <p>Social competences: Communication Teamwork Leadership</p>	
<p>Contents</p>	<p>Sub-module 1 Introduction to EU funding opportunities</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> The 2014-2020 Multiannual Financial framework: political priorities, budget figures Indirect funding: the new sets of programmes -how do they work Direct funding: the main principles in the New Cohesion Policy Searching for funding opportunities: tips and tools (i.e. how to find information; what check first; what to keep in mind) 	<p>METHODS</p> <p>Lecture</p> <p>Lecture</p> <p>Lecture</p> <p>Case studies - Group work Plenary restitution</p>
	<p>Sub-module 2 The Logical Framework Approach – first stage: Analysis</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> The Project Cycle and Key PCM Principles The Logical Framework Approach – a project design and management tool (focus on the LFA first stage: analysis) <ul style="list-style-type: none"> Stakeholder analysis Problem analysis Analysis of objectives Analysis of strategies Adapting the LFA to EU funded projects' different stages: tips and tools on how to use it in planning, implementing, monitoring and valorising. 	<p>Lecture</p> <p>Lecture and Exercises – Group work (Tools to be used: LF matrix, Problem Tree, Objective Tree) – plenary restitution</p> <p>Lecture Case studies - Group work plenary restitution</p>

	<p>Sub-module 3 Commitment building: involving internal and external stakeholders</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> 1. Stakeholder Categories: from broad analysis to identification of potential involvement levels (i.e. users, partners, funding authorities, business sponsors/donors, internal and/or external suppliers) 2. Commitment building: the project as a human organism (adaptation from the Agile Project Management theory) 3. Stakeholders addressing strategy (focus on communication strategy for involvement of home institution and consortium building) 	<p>Lecture and Exercises – Group work (Tools to be used: Power and Interest matrix; Spider and Venn diagrams; Stakeholder analysis matrix) – plenary restitution</p> <p>Lecture</p> <p>Group work (brainstorming, discussion, plenary restitution)</p> <p>Lecture and Exercises – Group work (Tools to be used: internal and external communication plans) – plenary restitution</p>
	<p>Sub-module 4 Feasibility check</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> 1. Feasibility check <ul style="list-style-type: none"> • Analysis of EU funding programme and specific call requirements, relevant EU policies and priorities included • Survey of the state of the art • Institutional capacity check • Risk analysis 	<p>Lecture Case studies - Group work plenary restitution</p>
<p>Highlighted areas</p>	<p>Project “identification” phase</p>	
<p>Duration</p>	<p>+/- 5 days/ 40h (depending on level of participants’ competences and their requirements/needs, the trainer will set the duration according to learning objectives) 20% theory / 80% practice (i.e. exercises / case studies group work; brainstorming; plenary interaction/restitution)</p>	

Module II	PROJECT PLANNING
Specialisation	Project Manager
Target learners	EU funded project managers Potential project managers Trainers
Pre-requisites	Language: Professional English (only for international project managers)
Objectives of the module	<p>This module is focused on the phase of a project cycle called project planning. The project planning phase follows project identification (initiation, conceptualisation) phase, where basic aim and goals for the project are set, as well as main activities and resources are defined and stakeholders and feasibility analysis are performed. This phase is based on planning processes that define and mature the project scope, develop the project management plan, and identify and schedule the project activities that occur within the project. We will discuss project planning in terms of developing detailed specifications, planning the activities, budget and schedule and developing other plans for the project. At the completion (termination) of the project “project planning” helps to evaluate the project results.</p> <p>In order to achieve comPM training curriculum general purpose, the objectives of this module will be:</p> <ul style="list-style-type: none"> • Objective 1 – To present to EU project managers’ an overview of project planning methods, tools and techniques; • Objective 2 – To improve EU project managers’ technical skills in the use of project planning methods, tools and techniques; • Objective 3 – To present to EU project managers’ the basic components of project start-up document; • Objective 4 – To provide EU project managers with competences and tools enabling them to transform identified project into a project start-up documentation that presents the basic for effective and efficient project implementation.
Overview Targeted Competencies	<p>Individual competences:</p> <p>Flexibility Problem solving Planning & Organizing Innovativeness</p> <p>Social Competences:</p>

	<p>Team work Communication Professional Competences: Project Environment</p>	
Contents	<p>Sub-module 1 Introduction to project planning and project start-up document</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> 1. The process of project planning 2. Basic project planning methods, tools and techniques 3. The structure of project start-up document 4. Defining project purpose, objectives and deliverables 	<p>METHODS</p> <p>Lecture</p> <p>Lecture + discussion</p> <p>Lecture</p> <p>Case studies - Group work</p>
	<p>Sub-module 2 Defining project scope and project schedule</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> 1. Defining project scope – WBS 2. Project scheduling: network planning 3. Defining project schedule 4. The use of project planning software 	<p>Lecture, case study</p> <p>Lecture</p> <p>Lecture</p> <p>Demonstration, computer exercises</p>
	<p>Sub-module 3 Project resources, costs and risks</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> 1. Defining human resources – project responsibility assignment matrix 2. Basics of planning project costs and budgeting 3. Managing project risk 	<p>Lectures</p> <p>Lectures, case study</p> <p>Lectures, case study</p>
	<p>Sub-module 4 Competence Check</p> <p>Closing session of Module II</p> <ul style="list-style-type: none"> • Brief summary of the contents • Links to the 2 core competences: 	<p>Interactive session</p> <p>Plenary brainstorming</p>

	Problem solving and Planning and organising	
Highlighted areas	Project “planning phase” phase	
Duration	<p>+/- 4 days /32h (1,5 days sub-modules 1 and 2; ¾ day sub-module 3 + 2 hours for competence check) /depending on level of participants’ competences and their requirements/needs, the trainer will set the duration according to learning objectives</p> <p>20% theory / 80% practice (i.e. exercises / case studies group work; plenary interaction/restitution)</p>	

Module III	FINANCIAL MANAGEMENT
Specialisation	Project Manager
Target learners	(EU funded) Project managers Potential project managers
Pre-requisites	Language: Professional English (only for international project managers) Preferably (not obligatory) having taken the Module Project Planning.
Objectives of the module	<p>Project financial management is a process which brings together planning, budgeting, accounting, financial reporting, internal control, auditing, procurement, disbursement and the physical performance of the project with the aim of managing project resources properly and achieving the project's development objectives.</p> <p>This course offers a comprehensive approach to understanding the importance of financial management in managing projects. Project managers have the responsibility to ensure proper use of capital assigned to them and to meet all project objectives. Time is money and project managers must appreciate the importance of financial management to make effective project decisions.</p> <p>This module on the financial management of projects contains five sub- modules. We start with some Basic Financial Principles in the first and second sub-modules on General accounting and Cost accounting. The third sub-module focuses on the Business Case, the base of every project. Budgeting is the topic of the fourth sub-module and we close this module with a Cost control section in the fifth and final sub-module.</p> <p>General aims and objectives of the module Financial Management are:</p> <ul style="list-style-type: none"> • General introduction to accounting • Create better understanding and insight into financial terms • Understanding the principles and means of financial management • Being able to communicate with accounting departments and funding authority on financial issues • General understanding of cost accounting • Point out the necessity of a project Business Case • Show the minimal components a Business Case should contain • Methods for the quantification of data

	<ul style="list-style-type: none"> • Provide possible methods for setting up a budget • Show the importance of cost control • Provide tools for controlling the project budget 	
Overview Targeted Competencies	<p>Individual Competence: Planning and Organizing</p> <p>Professional Competences: Financial Management and Accounting</p>	
Contents	<p>Sub-module 1 Basic financial principles: General accounting</p> <p><i>Exercises:</i></p> <ol style="list-style-type: none"> 1. T-accounts 2. Chart of accounts 3. Balance 4. Balance analysis 5. Documents 6. The concept of turnover 7. VAT 	<p>METHODS</p> <p>Lecture, discussion, individual and group exercises</p>
	<p>Sub-module 2 Basic financial principles: Cost accounting</p> <p><i>Exercises:</i></p> <ol style="list-style-type: none"> 1. Lecture on cost distribution, break-even and cost factors 2. Cost distribution sheet 3. Deviations analysis 	<p>Lecture, individual exercises</p>
	<p>Sub-module 3 The Business Case</p> <p><i>Exercises:</i></p> <ol style="list-style-type: none"> 1. Key components 2. Cost/Benefit <ul style="list-style-type: none"> ▪ Payback period ▪ Break-even ▪ Value 3. Example 	<p>Lecture, brainstorming, discussion, group and individual exercises</p>
	<p>Sub-module 4 Budgeting</p> <p><i>Exercises:</i></p>	<p>Lecture, brainstorming, discussion, individual</p>

	<ol style="list-style-type: none"> 1. Sales budget 2. Production planning 3. Raw materials budget 4. Miscellaneous costs budget 5. Labour budget 6. Distribution budget 7. Liquidity budget 8. Results planning 9. Resources project budget 10. Budget structure 11. Estimation techniques/Budget types 	exercises
	<p>Sub-module 5 Cost control</p> <p><i>Exercises:</i></p> <ol style="list-style-type: none"> 1. Earned Value – Definitions 2. Earned Value – Formulas 3. Calculation 4. Interpretation of parameters 5. (Dis)advantages of cost control with Earned Value 	Lecture, brainstorming, discussion, individual and exercises
Highlighted areas	Financial management	
Duration	<p>+/- 5 days / 40h (depending on level of participants' competences and their requirements/needs, the trainer will set the duration according to learning objectives)</p> <p>20% theory / 80% practice (i.e. exercises / case studies group work; brainstorming; plenary interaction/restitution)</p>	

Module IV	PROJET MARKETING AND COMMUNICATION
Specialisation	Project Manager
Target learners	EU funded project managers Potential project managers Trainers
Pre-requisites	Language: Professional English (only for international project managers) There is no need of specific knowledge
Objectives of the module (Introduction and aims)	<p>European funded projects need to ensure a proper dissemination of results achieved during their implementation, in order to create the conditions for future exploitation and adoption of project outcomes by relevant target-groups and stakeholders. This will attest the effectiveness of project management concerning marketing and communication actions.</p> <p>The transnational nature of projects brings additional challenges for marketing and communication success, as different cultures and countries should be taken into consideration when designing and implementing dissemination activities. Despite cultural differences, project managers have to ensure that the message is well formulated and communicated through the most suitable channels/tools in order to reach the desired audience with the expected impact.</p> <p>This module will support project managers enhancing their competences related to the marketing and communication actions within a EU project. At the end of the module trainees shall be able to:</p> <ul style="list-style-type: none"> • Objective 1 – To understand the importance of marketing and communication for the success of EU projects; • Objective 2 – To differ internal and external marketing and communication; • Objective 3 – To adjust marketing and communication actions according to the project phase; • Objective 4 – To select the appropriate tools and channels for marketing and communication; • Objective 5 – To enhance their competences related to the promotion of EU projects; • Objective 6 – To define indicators for the marketing and communication activities
Overview Targeted	Individual competences:

Competencies	<p>Decision-making Planning and organizing Social competences: Communication Teamwork Professional competences: Promotion</p>	
Contents	<p>Sub-module 1 Introduction</p>	Lecture
	<p>Sub-module 2 Basic Concepts</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> 1. Introduction (teaser) 2. Explanation of each concept and liaison between them 3. Practicum - Linking activities to marketing and communication processes. 	<p>Lecture (Individual task + Group discussion)</p> <p>Lecture</p> <p>Group task + discussion</p>
	<p>Sub-module 3 Marketing Mix</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> 1. Introduction (teasers) 2. Marketing Mix approach - presentation of each component of the Marketing Mix 3. Practicum - Linking activities to marketing and communication processes) 	<p>Lecture</p> <p>Lecture</p> <p>Group task + discussion</p>
	<p>Sub-module 4 Marketing and Communication Stakeholders</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> 1. Introduction (teasers) 2. Marketing and Communication Stakeholders - internal and external stakeholders, power versus interest grid 3. Practicum - Adjusting message to stakeholders 	<p>Lecture</p> <p>Lecture + Group discussion</p> <p>Group task + discussion</p>
	<p>Sub-module 5 Marketing and Communication</p>	

	<p>Phases</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> 1. Introduction (teasers) 2. Raise Awareness, Engagement, Selling / Transfer - exploration of the various phases 3. Practicum - "Raising Awareness for healthier life routines" 4. Practicum - Case-Study "Engagement methods" 	<p>Lecture</p> <p>Lecture + Group discussion</p> <p>Group task + discussion</p> <p>Group task + discussion</p>
	<p>Sub-module 6 Channels and Tools</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> 1. Introduction (teasers) 2. Web-based; Paper-based; Face-to-face events - Description and exploration of various channels and tools to be used in marketing and communication actions 3. Practicum - Compare and discuss 4. Practicum - Promotional material for an event 	<p>Lecture</p> <p>Lecture + Group discussion</p> <p>Group task + discussion</p> <p>Group task + discussion</p>
	<p>Sub-module 7 Assessment and Impact</p> <p><i>Lessons:</i></p> <ol style="list-style-type: none"> 1. Introduction (teaser) 2. Assessment and Impact - The relevance of evaluation process within marketing and communication strategy 3. Practicum - Kellogg's Case-Study 	<p>Lecture</p> <p>Lecture + Group discussion</p> <p>Group task + discussion</p>
<p>Highlighted areas</p>	<p>Marketing and communication is transversal to all phases of project management, with higher emphasis on planning and implementation phases.</p>	
<p>Duration</p>	<p>+/- 3 days / 24h (depending on level of participants' competences and their requirements/needs, the trainer will set the duration according to learning objectives)</p> <p>20% theory / 80% practice (i.e. exercises / case studies group work)</p>	

Module V	MONITORING AND EVALUATION
Specialisation	Project Manager
Target learners	EU project managers, Potential EU project managers, Trainers, advisors, Members of a project team
Pre-requisites	Language: Professional English (only for international project managers), Knowledge about the specificity of European projects, Knowledge of EU policies, strategies and funding programmes, basic knowledge about research.
Objectives of the module	<p>This module is focused on two issues essential for the implementation of a project: monitoring and evaluation.</p> <p>Monitoring is defined as a process of systematic collecting and analysing quantitative and qualitative information about the implemented project in its financial and content aspects. In practice, monitoring is an internal mechanism of management which is part of the daily management. It is quite different from evaluation, which is a periodic assessment of relevance, efficiency, effectiveness, impact, economic and financial ability, and sustainability of a project in the context of its objectives.</p> <p>Objectives:</p> <ul style="list-style-type: none"> • Objective 1 - To increase awareness of the role of monitoring and evaluation in the PCM • Objective 2 - To assist the project management through monitoring and evaluation actions • Objective 3 - To increase knowledge and skills in preparing and developing the project monitoring system • Objective 4 - To increase knowledge and skills in the field of implementation of the monitoring tools • Objective 5 - To increase knowledge and skills in the planning and implementation of the evaluation strategy • Objective 6 - Practical implementation of knowledge and skills in the following fields: <ul style="list-style-type: none"> ▪ defining the purpose of the evaluation, ▪ defining the dimensions of the evaluation, ▪ defining the availability and data sources, ▪ defining the research questions, ▪ determining the research methodology, ▪ selecting research methods and techniques.

<p>Overview Targeted Competencies</p>	<p>Social competence: Leadership Professional competence: Monitoring and evaluation</p>	
<p>Contents</p>	<p>Sub-module 1 Project Monitoring</p> <p><i>Teaser 1</i> The essence and functions of the monitoring of the project</p> <p>Exercise 1 Map of needs and purpose of project monitoring</p> <p><i>Teaser 2</i> Systems & instruments of project monitoring</p> <p>Exercise 1 Designing a system of project monitoring</p> <p>Exercise 2 Practical Tool of Monitoring Action. Practical monitoring tool supporting the process of the PCM</p> <p>Exercise 3 Summary (physical) & financial monitoring REPORT</p> <p>Exercise 4 Designing a system of project monitoring</p>	<p>METHODS</p> <p>Lecture Discussion</p> <p>Workshops Discussion</p> <p>Workshops Discussion</p> <p>Workshops Discussion</p> <p>Workshops Discussion</p> <p>Workshops Discussion</p>
	<p>Sub-module 2 Project Evaluation</p> <p><i>Teaser 1</i> The essence, definition and the functions of the evaluation in PCM</p> <p>Exercise 1 Framework of the evaluation</p> <p><i>Teaser 2</i> System of the evaluation practices in the project's processes</p> <p>Exercise 1 Designing of project evaluation strategy in Terms of Reference (ToR)</p> <p>Exercise 2 Final Evaluation Mission Report - design and</p>	<p>Workshops Discussion</p> <p>Workshops Discussion</p> <p>Workshops Discussion</p> <p>Workshops Discussion</p> <p>Workshops</p>

	<p>application</p> <p>Exercise 3</p> <p>Framework of application of the evaluation recommendations from the report</p>	<p>Discussion</p> <p>Workshops</p> <p>Discussion</p>
Highlighted areas	Project implementation, monitoring, evaluation phase	
Duration	<p>+/- 5 days/ 40h (3 days for sub-module 1; 2 days for sub-module 2; plus 2 hours for competence check)/ depending on level of participants' competences and their requirements/needs, the trainer will set the duration according to learning objectives</p> <p>20% theory / 80% practice (i.e. lectures, exercises, group work)</p>	

Module VI	SUPPORTING SKILLS	
Specialisation	Project Manager	
Target learners	EU funded project managers Potential project managers Trainers	
Pre-requisites	Language: Professional English (only for international project managers)	
Objectives of the module	<p>Module 6 aims at training and letting the participants “experience” key transversal competences that need to be acted in each of the phases of the project, from planning to evaluation. Since “soft skills” is a very wide topic that could easily be treated in a long seminar, this module is focused only on those skills that need to be acted during the project phases, in order to have success in managing an EU funded project.</p> <p>Module 6 is a very practical component of the training programme, allowing participants to understand how to “act” their skills in real situation, referring to the specific contents’ areas from Module 1 to Module 5.</p>	
Overview Targeted Competencies	<p>Individual competences</p> <ul style="list-style-type: none"> Flexibility Persistence Problem-solving Decision- making Planning and organizing Initiative <p>Social competences</p> <ul style="list-style-type: none"> Leadership Teamwork Communication Conflict management Negotiation 	
Contents	<p>Sub-module 1 Supporting skills in the project framework</p> <p>In the project framework phase, the following soft skills are the essential ones and are being developed in sub-module 1:</p>	<p>METHODS</p> <p>Case studies - Group work</p>

	<p>Individual competences: Problem solving Flexibility</p> <p>Social competences: Leadership Communication Team working</p>	<p>plenary restitution</p>
	<p>Sub-module 2 Supporting skills in project planning</p> <p>The most important soft skills for project planning which are being developed are these ones:</p> <p>Individual competences: Flexibility Persistence Problem Solving Initiative</p> <p>Social competences: Leadership Team work Communication Conflict management</p>	<p>Case studies - Group work plenary restitution</p>
	<p>Sub-module 3 Supporting skills in Financial Management</p> <p>The most important soft skills for project financial management which are being developed are these ones:</p> <p>Individual competences: Problem solving Flexibility Planning and organizing</p> <p>Social competences: Communication Team working Negotiation</p>	<p>Case studies - Group work plenary restitution</p>
	<p>Sub-module 4 Supporting skills in Project Marketing & Communication</p> <p>The most important soft skills for project marketing & communication which are being developed are these ones:</p> <p>Individual competences:</p>	

	<p>Flexibility Persistence Planning and organizing Initiative Social competences: Leadership Team work Communication Negotiation</p>	<p>Case studies - Group work plenary restitution</p>
	<p>Sub-module 5 Supporting skills in Monitoring and Evaluation</p> <p>The most important soft skills for project monitoring and evaluation which are being developed are these ones:</p> <p>Individual competences: Flexibility Problem-solving Decision-making Planning and organizing</p> <p>Social competences: Leadership Teamwork Communication Conflict management</p>	<p>Case studies - Group work plenary restitution</p>
Highlighted areas	<p>Project framework, planning, financial management, marketing & communication, evaluation and monitoring</p>	
Duration	<p>+/- 4 h per every sub-module (it is recommended to deliver the Module 6 together with the Modules 1-5)</p> <p>100% practice (i.e. case studies group work; simulation games; plenary interaction/restitution)</p>	