

PROJECT MANAGEMENT FOR PARTICIPATORY PLANNING

TRAINING LEVEL: Beginner

TRAINING TOPIC

The success of participatory processes is largely dependent on good project management. Most participatory processes involve a large number of different types of actors, and therefore a well-planned project management of any participatory process is essential for its successful implementation. This training presents key principles of quality project management, basic approaches and methodologies, selection of project management tools and practical tips. It focuses specifically on project management in the context of participatory planning and is aimed at helping professionals who are in charge of managing participatory processes.

TRAINING OBJECTIVES

In this document you will learn:

- What project management of participatory processes is and what principles to follow to ensure its high quality
- Specific tools that can help you with project management

TABLE OF CONTENTS:

1. [Key terms definition](#)
2. [Common approaches to project management](#)
3. [Principles of high-quality project management](#)
4. [Project management tools](#)

1. KEY TERMS DEFINITION

Project management

Project management means the coordination of individual actions needed to implement a project. It includes every step that has to be planned and executed to successfully complete a project with respect to the budget, time frame and thematic framework. Project management can be handled by a single project manager or a multi-member project team.

Project management includes activities such as: project planning, supervising project implementation, team leadership, strategy planning, managing project documentation, establishing rules for project management, securing and coordinating project team members - internal and external, possibly acquiring suppliers, solving problems and crises, etc.

Project manager

A project manager is a person who is in charge of a specific project and is responsible for its progress. Depending on the size of the project, the team and the project management practice at the given institution, the project manager may be primarily responsible for managing the project team and guaranteeing that the set milestones, outputs and deadlines are met at the expected quality. For smaller teams with fewer human resources, the project manager may be in charge of delivering most of the project activities, from planning to implementation to final evaluation.

2. COMMON APPROACHES TO PROJECT MANAGEMENT

There are two widely recognized associations that have developed global project management standards and certifications:

2.1 PMBOK

The Project Management Body of Knowledge (PMBOK) by the Project Management Institute (PMI) was first published in 1996. Its latest version, the 7th edition, published in August 2021, covers both traditional project management and agile practices with a greater emphasis on delivering value to projects. It is a set of guidelines, best practices, conventions and techniques that are considered industry standards and are used in more than 180 countries.

2.2 PRINCE2

PRINCE2 stands for PProjects IN Controlled Environments. It was developed by the UK Government Business Office in 1989 to reduce the number of failed government IT projects. It is a process-based method that provides the essential skills needed to become a successful project manager and is today the standard for project management in many UK and most Commonwealth government agencies. PRINCE2 is also used by the United Nations in its important development projects around the world.

How do PMBOK and PRINCE2 differ?

The **PMBOK Guide** focuses on the role of the project manager, offers methods, tools and areas of knowledge to increase the success of projects, and uses professional and advanced technologies. **PRINCE2**, on the other hand, is process-based, defining how, when and who does what in a project, defining the roles of everyone involved and using simpler terminology and concepts.

Other project management methodologies worth mentioning: the **International Project Management Association (IPMA)** - founded in Switzerland as the first project management association in the world and focused on building project management competencies; **PM Squared** - an open project management methodology developed by the European Commission, recently launched and available for free.

3. PRINCIPLES OF QUALITY PROJECT MANAGEMENT

1. Set clear project goals

The foundation of every project is its goals. It is necessary to know why the project is happening and what it is trying to achieve. Project management is based on this knowledge. This is especially important when managing participatory projects: embarking on a participatory process without clear goals just because “we want to participate” or because participatory planning is being done elsewhere, leads to poor planning and frustration and mistrust among participants. If the specific goal or goals of the project are not defined at the beginning, it will negatively affect the entire project.

Keep in mind: *participation is never a goal in itself, participatory planning serves as a tool to achieve project goals faster and more efficiently.*

2. Plan and secure the necessary capacities and resources in advance

Good project management is built in such a way that those responsible can devote enough time to it. It is essential to ensure that there are enough project team members and to give them the time and space to truly manage the project. Do not underestimate how much work goes into quality project management. At the beginning of the project, evaluate how many people will be needed for the quality implementation of the project. If you lack sufficient capacities within your institution, consider outsourcing to external suppliers and secure them in time.

Common mistake: *underestimating the complexity of projects and overloading employees, which has a negative impact on the quality of project results.*

3. Secure the right suppliers and set up collaboration

If you lack internal capacity or expertise, do not hesitate to outsource part of the process. Early in the project planning phase, identify the activities that need to be outsourced and conduct market research to find suppliers who can deliver them. Set a budget for outsourcing. However, keep in mind that for participatory activities, the primary deciding criteria should not be the price, but the quality of the supplier. You can ensure quality by correctly writing [public procurement contracts](#).

Depending on the nature of the outsourced participatory activities, you should determine how often you will be in contact with the supplier throughout the process, rather than waiting for the final outputs. Regular monitoring and reporting in the form of written reports or meetings will allow you to see potential issues with quality or form of final outputs in time, so that you can make the necessary adjustments and changes without jeopardizing the outcome of the project.

4. Plan your project carefully to ensure effective resource management

Good project management should not waste time, human resources or money. In order for planning to be effective, it is necessary to plan each step of the project at the outset, taking into account the necessary finances, human capacities, time and other resources. Detailed project planning at the very beginning enables efficient use of allocated resources and helps prevent unpleasant surprises during the course of the project. At the same time, however, it is important to be prepared to modify and adapt the plan to the current situation in response to external influences during the project.

5. Ensure efficient work with data, outputs and information

During the participatory process, you obtain various data, information and outputs, which you will need to properly record, store and possibly share with others. We can divide the data into the following two categories:

- ***Data and outputs for the project that enable effective project management, assessment and evaluation***

During the course of the project, it is important to record, store and share outputs informing about the progress of the project, important milestones, decisions and other important information that all team members will have access to and that will allow monitoring the progress of the project for its final evaluation. These include, for example, records from project team meetings, reports from suppliers, attendance sheets from workshops, etc. [Project evaluation](#), or at least regular monitoring and evaluation after each phase, is key to identifying what worked and what did not work on the project and could be done better. This will help you avoid repeating mistakes in the future and know what possible changes to make for the next cycle of the project or another similar project that you or your organization will deal with in the future.

- ***Data on target groups obtained during the participatory process, which can also be used for other projects***

During participatory processes, you obtain various data about target groups (key actors, the general public, communities or socio-demographic groups), which are valuable not only for the project in question, but can also be useful for other projects you or your institution are involved in or will be in the future. These can be the results of sociological surveys and polls, reports from workshops with the public summarizing the needs of participants with regard to a certain agenda, or ideas and comments on a certain project or agenda.

Both of the above-mentioned types of data and outputs need to be recorded in a format approved by your institution, stored and made available to other key people involved in the project or working on the same or similar agenda in your institution. It is therefore necessary to determine already in the project planning phase what specific data and outputs you will collect throughout the project, how to record them, where to store them and with whom to share them.

6. Select the right tools to help you manage your project effectively

There are many project management tools that can help you manage your projects more efficiently. Selecting the right tools depends on the complexity of the project in question and the size of the project team, as well as on the practices within your organization. Consider the following aspects to select the right tool:

- How many people need to have access to information about the project?
- What type of information do you need to share and with whom?
- What type of features do you need the project tool to provide? (E.g. s shared drive for documentation, tasking other team members, scheduling the project into individual phases and activities within the timeline, sending messages to other team members, etc.)
- What project management tools are you already using in your organization? Are their features sufficient for what you need for the project?
- Are project team members willing to learn and start using new tools?

Project management tools are not only complex digital tools, but also project documentation. In this training, project management tools are divided into the two following categories: I. Key project documentation, and II. Supporting digital tools for project management.

4. PROJECT MANAGEMENT TOOLS

I. Key project documentation

These are documents that allow you to clarify, establish and record key information about the project. Start early in the project planning phase by identifying exactly what documents and outputs from what activities you will need to collect throughout the project, and create templates for them - unless they already exist within your institution.

Key project documentation includes the following:

- Project framework

A project framework is a document that should be created at the very beginning of every project. Creating a project framework allows the project manager and their team to clarify the essential aspects of the project such as its progress, goals, risks and more, and

leave nothing to chance. The document contains all the key information about the project, namely:

- Project description
 - Project timeline
 - Outputs
 - Results
 - Target groups for consultation and data collection
 - Rules
 - Budget
 - Project team and responsible persons
 - Required tools
 - Communication plan
 - Project purpose
 - Definition of project success
 - Limitations
 - Risks
- Process plan with timeline

The process plan is used to plan out the individual project phases into sub-activities, including the timeline for each of them and the persons responsible for individual actions. These are the concrete steps of project implementation. A process plan can be part of a project framework. You can use the Gantt Chart method in Excel or one of the supporting digital tools for project management to create it.

- Meeting minutes

All important project team meetings and meetings with project stakeholders and partners should be recorded. Meeting minutes should contain: date, participants and their organization, main points of discussion, what was decided and specific next steps or tasks that were agreed upon. The minutes should then be shared with the meeting participants and stored in the project folder. This is useful in case of a future need to review what was agreed upon at the meeting or for a retrospective overview of how the project developed.

- Attendance sheet

The attendance sheet is useful if you want to keep track of the number of participants and who has arrived at the workshops and discussions with the public and stakeholders.

You can create a uniform attendance sheet template and use it for all meetings of a similar type, or customize the template as needed for each event. If you are organizing a workshop with the public, where the outputs are to remain anonymous or you want to maintain the sense of anonymity for the participants, you can prepare an attendance sheet where they won't fill in personal data such as name, but only non-identifiable information such as in which part of the municipality they live or how they relate to the area (e.g. I live here, I have a business here, I go to school, etc.).

In addition to the attendance sheet, a form where interested parties can leave their contact information is also useful (if not part of the attendance sheet). After the meeting, you can send the participants an evaluation questionnaire, a report from the workshop, inform them about the next steps in the project or invite them to the next workshop. The form will allow you to get valuable contacts on active citizens.

A typical attendance sheet should include: name, surname, contact (phone number, email), or organization. Important: do not forget the information about consent to the processing of personal data according to the GDPR.

- Reports

Interim and final reports on the progress of the project and its individual activities provide important information for project evaluation. Carefully select the activities for which you will request reports. Reports are useful when certain activities or project phases are delivered by suppliers. We recommend that you decide at the outset of the project what data and information the reports should contain.

Keep in mind: the report should provide the necessary information about the project or the given activity. It is better to establish the format of the report and what it should contain at the outset to ensure that the report is practical and serves the needs of the project and is not just long pages of text that end up in a drawer.

II. Digital tools for project management

There are many digital tools that can make project management easier and more efficient. Below you will find several examples of digital tools and platforms for project management. Each tool has different functions. Determine first what functions you need the tool to provide and then select the right one for your project.



IPR
PRAGUE

Examples:

- [Projektově.cz](#)
- [Microsoft Teams](#)
- [Trello](#)
- [Monday](#)
- [Asana](#)