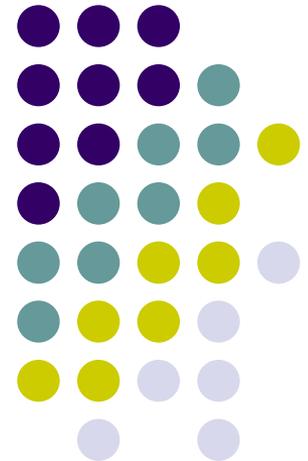


PROJECT FORMULATION



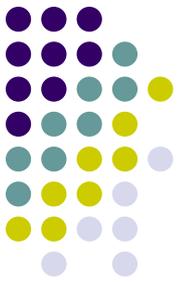
SWRK 4013: Social Welfare Administration

Dr. Rashmita Ray
Assistant Professor
Deptt. of Social Work
Mahatma Gandhi Central University, Motihari, Bihar

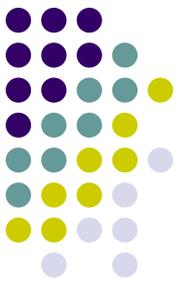


Dated: 26 April 2020 (Covid-19 Era)

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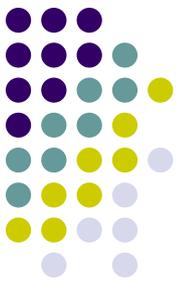
- What is a Project?
- Key features of a Project
- Project Objectives
- Project Life-Cycle (Phases): Conceptualisation; Feasibility Study; Preliminary Planning
- Information Requirements for Project Formulation
- Steps in Project Formulation
- What are **Project Deliverables**?
- Defining Project Success
- Challenges faced in designing & managing projects
- Work Break-Down Structure (**WBS**); **Gantt Chart**; Critical Path



What is a Project?

Project vs. Process

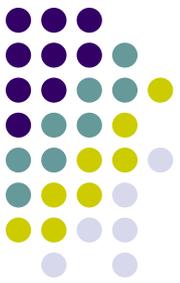
- Projects and project work are often contrasted with process:
process describes the normal day-to-day activities of an organization,
while the word **project** is often used to describe something outside normal day-to-day work.
- A **project** is a unique venture with a beginning and an end, conducted by people to meet established goals within parameters of cost, schedule and quality.
 - Buchanan and Boddy (1992)



What is a Project?

- A project is a set of people and other resources temporarily assembled to reach a specified objective, normally with a fixed budget and with a fixed time period. Projects are generally associated with products or procedures that are being done for the first time or with known procedures that are being altered.

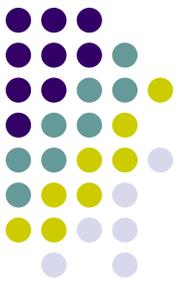
- Graham (1985)



What is a Project?

- The simplest form of a project is a discrete undertaking with defined objectives often including time, cost and quality (performance) goals. All projects evolve through a similar 'life-cycle' sequence during which there should be recognised start and finish points. In addition the project objectives may be defined in a number of ways, e.g. financial, social and economic, the important point being that the goals are defined and the project is finite.

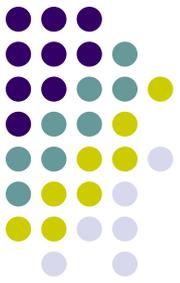
Key Features of a Project ...



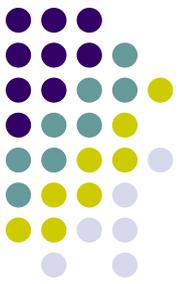
Key features of these quotations are that a project has the following characteristics:

- a project is a **unique** undertaking: each one will differ from every other in some respect
- projects have specific **objectives (or goals)** to achieve
- projects require **resources**
- projects have **budgets**
- projects have **schedules (Work Break-Down Structure [WBS]; Gantt Chart [G], Critical Path & Slack)**
- projects require the **effort of people**
- **measures of quality** will apply
- It involves certain **risks & uncertainties**
- Highlights of **trade-offs (The Time- Cost Trade- Off: In today's "hurry-up" world, the pressures are on finishing projects in record time)**

Project Objectives



- Project objectives/goals should be **agreeable to all parties**.
- Project objectives should not be too rigid to **accommodate changing priorities**.
- **Sufficient time** should exist to define objectives well.
- Objectives should be adequately **quantified**.
- Objectives should be **documented** well in advance.
- Efforts of client and project personnel should be well **coordinated**.
- Personnel **turnover** should be low.

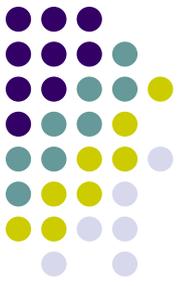


Project: Life-Cycle Phases

Consider a company/organisation that utilizes the following **life-cycle phases**:

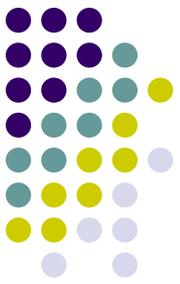
- Conceptualization (*Development of a **Concept Note***)
- Feasibility
- Preliminary planning
- Detail planning
- Execution
- Testing and commissioning

Life-Cycle Phases: Conceptualization



- The conceptualization phase includes brainstorming to determine two critical factors:
*(1) identify and define the **problem**, and*
*(2) identify and define **potential solutions**.*
- In brainstorming all ideas are recorded and none are discarded.
- There should be no formal authority present
- Should last thirty to sixty minutes (and not more)

Life-Cycle Phases: Feasibility Study

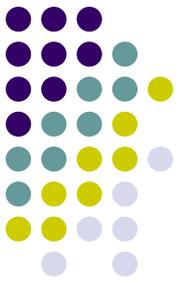


The feasibility study phase considers the **technical aspects** of the **conceptual alternatives** and provides a **firmer basis** on which to **decide whether to undertake the project**.

The purpose of the feasibility phase is to:

- *Plan the project development and implementation activities.*
- *Estimate the probable elapsed time, staffing, and equipment requirements.*
- *Identify the probable costs and consequences of investing in the new project.*
- **User/beneficiary involvement** during the feasibility study is critical.
- Project Manager must be able to **judge the impact of alternative approaches**.
- Solutions must be operationally, technically, and economically feasible.
- Considerable experience and technical expertise are required to gather the proper information, analyze it, and reach practical conclusions.

Life-Cycle Phases: Feasibility Study-2



A typical feasibility study checklist might include:

Summary level

- Evaluate alternatives
- Evaluate market potential
- Evaluate cost effectiveness
- Evaluate producibility
- Evaluate technical base

Detail level

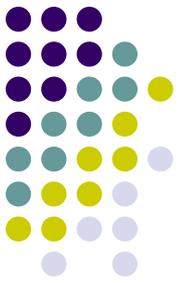
- A more specific determination of the problem
- Analysis of the state-of-the-art technology
- Assessment of in-house technical capabilities
- Test validity of alternatives
- Quantify weaknesses and unknowns
- Conduct trade-off analysis on time, cost, and performance

✓ ***Prepare initial project goals and objectives***

✓ ***Prepare preliminary cost estimates and development plan***

✓ **The end result of the feasibility study is a management decision on whether to terminate the project or to approve its next phase.**

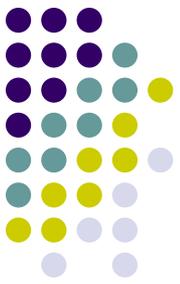
Life-Cycle Phases: Preliminary Planning



This is the phase where the effort is officially defined as a project. In this phase, we should consider the following:

- General scope of the work
- Objectives and related background
- Tasks to be performed (**WBS**)
- End-item performance requirements
 - **DELIVERABLES & KEY MILESTONES**
- Resources required – man-power, materials, money
- Reference to related studies, documentation, and specifications
- Data items (documentation)
- Client/customer-furnished property, facilities, equipment, and services
- Client/customer-furnished documentation
- Schedule of performance
- Exhibits, attachments, and appendices

Information Requirements for Project Formulation



Effective total program planning cannot be accomplished unless all of the **necessary information** becomes available at project initiation. These information requirements are:

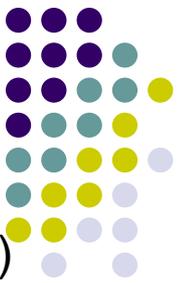
- **The statement of work (SOW)**
- **The project specifications**
- **The milestone schedule**
- **The work breakdown structure (WBS)**

The statement of work (SOW) is a **narrative description** of the work to be accomplished. It includes the **objectives** of the project, a **brief description of the work**, the **funding constraint** if any, and the **specifications** and **schedule**.

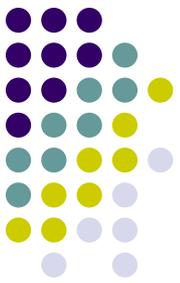
The **schedule** is a “gross” schedule and includes such things as the:

- **Start date**
- **End date**
- **Major milestones**
- **Written reports (data items)**

Steps in Project Formulation...



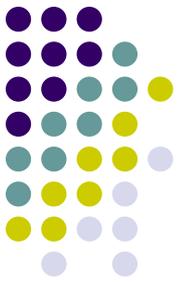
- **The Problem** or What is to be done? (Nature and extent of the problem)
[Need of **Baseline Data**]
- **Aims/Purpose:** Need of the project? Goal of the project?
- **Objectives:** What specifically the project wants to accomplish?
- **Implementing Agency:** Who will carry out the project ?
- **Project Design:** What will be the tasks / activities (**WBS**); to be undertaken methods & strategies to be adopted; implementation schedule/time frame (**Gantt Chart** or **precedence diagrams**); resources required and overall budget.
- **Stakeholders & Participants**
- **Strategies for Sustainability**
- **Project Review, Evaluation & Monitoring (PREM)**
- **Recording** (data collection), **Documentation & Reporting** (Type of Reports)
- Financial Management & Budget
- Appendices



What are Project Deliverables?

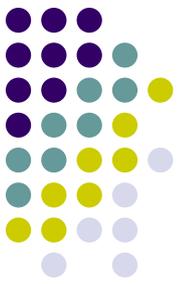
- Projects exist to produce deliverables...
- Deliverables are outputs, or the end result of either the completion of the project or the end of a life-cycle phase of the project.
- Deliverables are measurable, tangible outputs and can take such form as:
 - **Hardware Deliverables:** These are hardware items, such as a table, a prototype, or a piece of equipment.
 - **Software Deliverables:** These items are similar to hardware deliverables but are usually paper products, such as reports, studies, handouts, or documentation.
 - **Interim Deliverables:** These items can be either hardware or software deliverables and progressively evolve as the project proceeds. An example might be a series of interim reports leading up to the final report.

Defining Project Success...



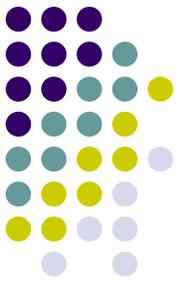
- **Success** of a project depends on its completion:
 - Within the allocated time period
 - Within the budgeted cost
 - At the proper performance or specification level
 - With acceptance by the customer/user
 - With minimum or mutually agreed upon scope changes
 - Without disturbing the main work flow of the organization
 - Without changing the corporate culture

Challenges faced in designing & managing projects...



- Project developers & managers must deal effectively with a broad spectrum of contemporary challenges :
 - High task complexities, risks and uncertainties
 - Fast-changing society, markets, technology, regulations
 - Intense competition, open global markets
 - Resource constraint, tough performance requirements
 - Tight, end-date-driven schedules
 - Total project life-cycle considerations

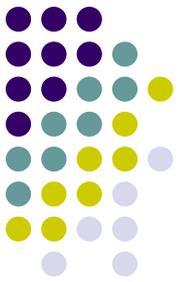
Challenges faced in designing & managing projects...



- Complex organizations and cross-functional linkages
- Joint ventures, alliances and partnerships, need dealing with different organizational cultures and values
- Complex ...processes and diverse stakeholder communities
- Need for continuous improvements, upgrades and enhancements
- Need for sophisticated people skills, ability to deal with organizational conflict, and politics
- Increasing impact of IT and e-business

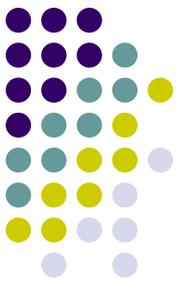
Work Break-Down Structure:

A WBS is developed to ...



- Define **what needs to be done** in the project and the **order** in which activities and their tasks should be completed
- Determine **what resources are required** and **when they will be required** or in project terminology 'allocated'
- Define tasks for delegation and the skills set required

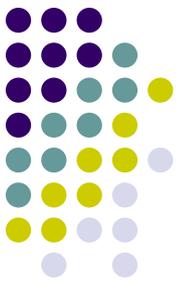




The WBS is a Key Document ...

- that is shared by everyone and it confirms a **common understanding** of the scope of work across the Project – for all the Project Stakeholders
- It helps to identify the Project Milestones
- Helps us to prepare a Gantt Chart
- Shows the Critical Path with Slack
- Assists with budget estimation
- Helps us to identify the project RISKS by showing any area of uncertainty



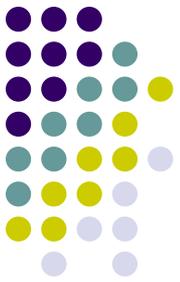


When should we develop a WBS

The WBS is usually started in the initial start of the project during the Project **Concept Phase** although it can be created at any time when the work to produce an output needs clarification, and of course, it will be further developed and refined during the planning process.



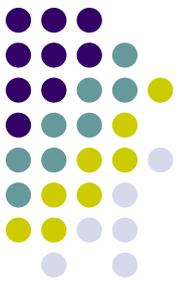
A Gantt Chart



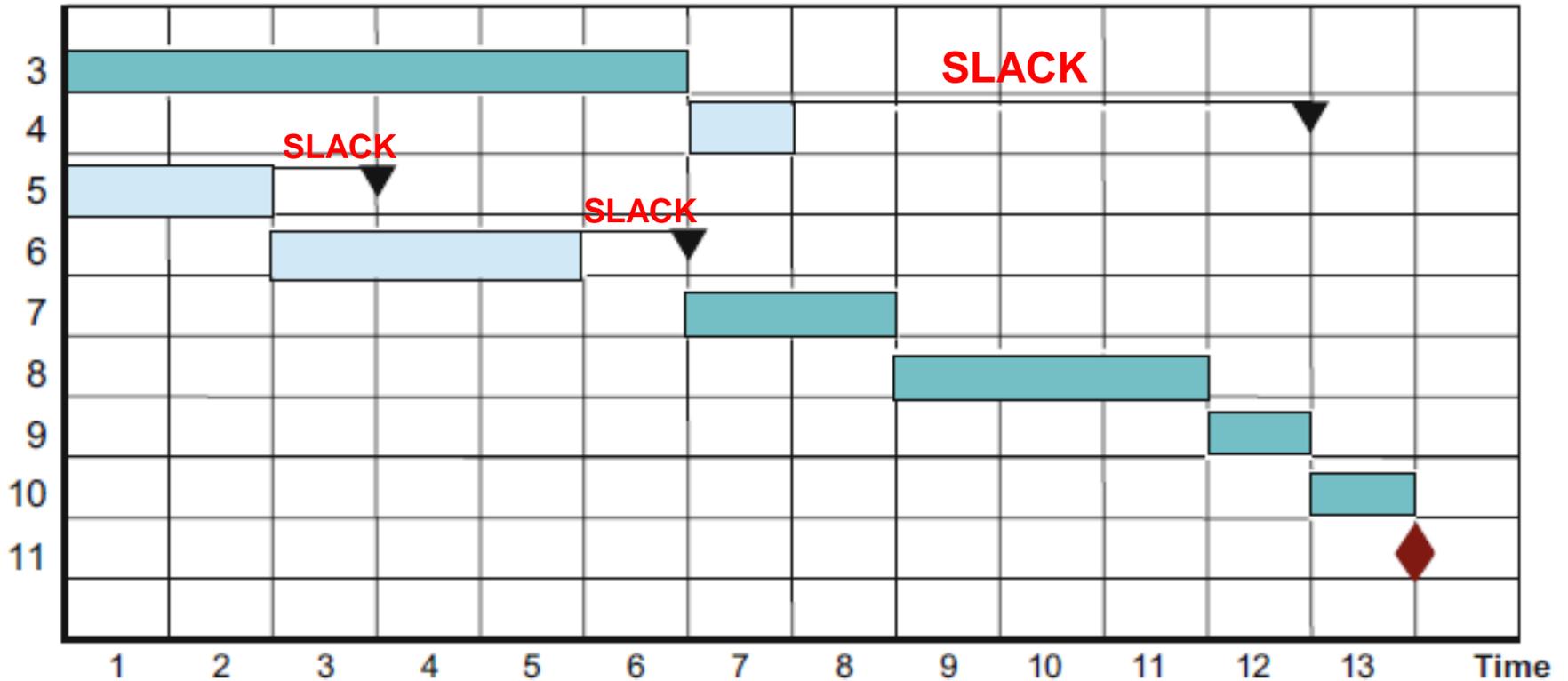
Activities and deadlines						Date:																
No.	Activities / Measure / Event	Responsible	Pre-conditions	Effort in weeks	Duration in weeks	Scheduling / Gantt chart																
						1	2	3	4	5	6	7	8	9	0	1	2	3	4	5		
1	Project																					
2	Phase 1																					
3	Activity A	MM	-	6		█	█	█	█	█	█											
4	Activity B	MM	3	1							█											
5	Activity D	PP	-	2		█	█															
6	Activity E	PP	5	3				█	█	█												
7	Activity C	MM	3;6	2							█	█										
8	Activity F	TT	7	3									█	█	█							
9	Activity G	MM	8	1												█						
10	Milestone Preparation	PL	4;9	1													█					
11	Milestone Decision	AG	10	0														◆				
12	Phase 2																					
13	Work package H	MM																				
14	:																					



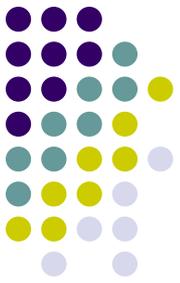
Gantt Chart, Critical Path with Slack



Activities

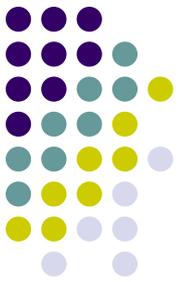


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THANKS

STAY SAFE!
MAINTAIN PHYSICAL & SOCIAL DISTANCE
THIS IS HOW WE CAN WIN THE WAR AGAINST
COVID-19

