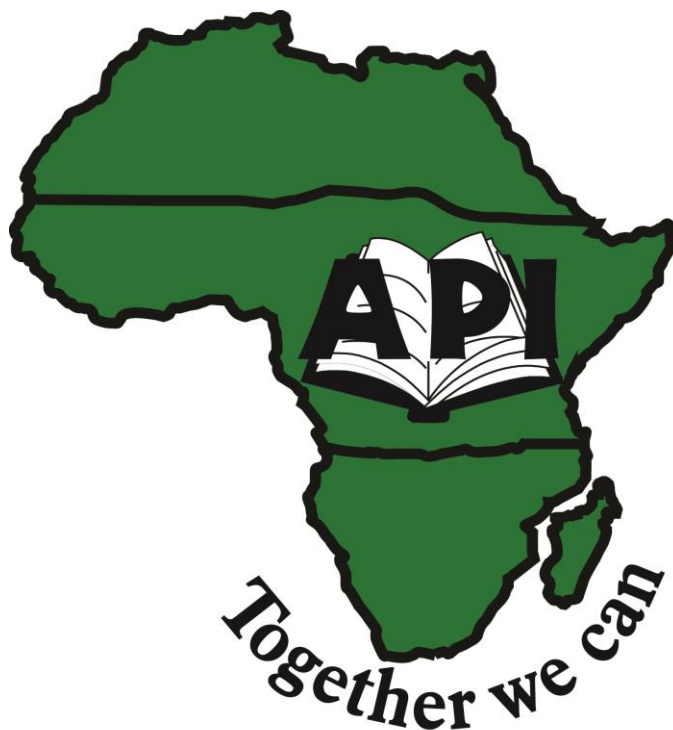


**AFRICA POPULATION INSTITUTE
(API)**



**PROJECT PLANNING AND MANAGEMENT
(PPM)
HANDBOOK**

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Forward:	iv
Introduction to PPM Course program:	1
MODULE 1: Management Concepts (Management Vs Administration)	2
Factors for the differences between administration and management.....	3
Managerial levels and hierarchy	3
Leadership Styles	4
Autocratic Leadership.....	4
Bureaucratic Leadership	4
Charismatic Leadership	4
Democratic Leadership or Participative Leadership.....	5
Laissez-Faire Leadership	5
People-Oriented Leadership or Relations-Oriented Leadership	5
Task-Oriented Leadership.....	5
Transactional Leadership	6
Transformational Leadership.....	6
Using the Right Style – Situational Leadership.....	6
How people work (Motivation theories).....	7
MODULE 2: Human Resource/ Personnel Management	8
Characteristics of Human Resource Manager.....	9
Differences between Human Resource and Personnel Management	9
People Acquisition and Development.....	11
Performance Management/Performance Appraisal	12
Administration of Policies, Programmes & Practices.....	14
Placement and Induction.....	14
MODULE 3: Procurement Management	15
Basic Concepts in Procurement	15
Definitions of logistics management:	17
Importance of Procurement Management.....	18
Tasks of Stakeholders in Procurement.....	19
Role of Procurement specialists.....	20
Principles of Procurement.....	20
Types of Procurement	20
Categories/Methods for Procurement	21
MODULE 4: Communication Skills	24
Objectives of communication	25
Levels of communication.....	25
Model of communication process.....	26
Types of communication.....	26
Characteristics/ qualities of good communication.....	27
Barriers to Effective Communication	28
How to Overcome the Communication Barriers	28
Guidelines for Effective Communication	29
How To Record Useful Meeting Minutes.....	29
Writing A Report	31
MODULE 5: Project Planning / the Project Cycle	32
What is a project?.....	32
Project Planning and Control.....	33
Project Management Process	34

Format for Project Proposal Writing.....	36
Feasibility Study and its Components	38
MODULE 6: Logical Framework Approach (LFA).....	40
Basic Principles;.....	40
Logical framework document	40
Advantages of the Logical Framework.....	42
MODULE 7: Project Implementation and Scheduling	42
Requirements for implementation.....	42
Causes of ineffective project implementation.....	43
MODULE 8: Problem Analysis and Needs Assessment	44
Problem Tree Analysis.....	44
Steps Involved In Problem Analysis.....	45
Classification of Needs	45
MODULE 9: Project Monitoring and Evaluation	46
Why Is M&E Important?	47
When Should M&E Take Place?	47
Important of the M&E Plans.....	48
M&E Plan Components:	48
MODULE 10: Cost Structure and Budgeting	48
Characteristics of a good budget.....	48
Objectives of Budgeting	48
Advantages of Budgeting.....	49
Limitation of Budgeting.....	49
Essentials of Effective Budgeting.....	50
Preliminaries in the Installation of Budget System.....	50
Functions of a Budget committee	51
Budget Terms and Concepts	51
Budgeting Techniques for operations:	52
Types of Budgets	52
Government Budgeting and its Cycle:.....	53
Key Factors that Make Public Budgeting Process Effective	53
MODULE 11: Performance measurement	53
References/ Bibliography.....	55

Forward:

API is a registered organization with 3 years' experience of supporting voluntary organizations, agencies and individuals in developing quality systems. A major part of our work is providing external evaluations and trainings to organizations or specific projects and also building capacities of the members to have relevant skills applicable to their working environment.

How we work

We aim to understand the precise needs of your organization and to offer you good value, an integrated service, and work which is based on clear principles. Our style is inclusive, participatory and flexible.

We aim to help you:

- Develop your skills, reflect and gain focus
- Make your organization more confident, effective and efficient, and able to demonstrate this to others
- Help you plan more effectively and strategically for the future
- Demonstrate the benefits (or outcomes) for your service users.

Our approach

- Starts by listening carefully to what you need and tailoring our services accordingly
- Includes clear and practical advice, plans and reports
- Is based on extensive knowledge and experience of the voluntary sector
- Is supportive and friendly.

Some of the other areas offered in our training workshops that are client tailored

- Monitoring and Evaluation training
- Public Health and HIV/AIDS management
- Research methods and data analysis
- Training of Trainers course
- Guidance and counseling techniques
- Family planning and RH issues
- Specialized statistical packages for data analysis
- Management and leadership skills development
- Procurement and contract management
- Peace and conflict management/resolution
- Disaster preparedness and management course

Introduction to PPM Course program:

As projects continue to grow in complexity, scope and size, a broad understanding of the concepts of project management is needed to ensure an organizations success in the marketplace. Project management is a formal discipline, increasingly recognized by more and more organizations, and is one of the fastest growing professions in today's, service, product development, and manufacturing industries. Project management is both an art and a science; an art because it requires skills, tact and finesse to manage people, and a science because it demands an in-depth knowledge of technical tools.

Project Management is designed to develop the knowledge base of persons working as project managers and project personnel within the construction industry, whether for the principal or for service providers i.e. consultants or contractors. The course focuses on basic principles across the breadth of the project management body of knowledge, and covers the key concepts in managing a project from its initiation to final closeout. The course reviews project management processes in an organized framework, with an emphasis on tools that enable the concepts to be applied directly into the participants working environment

In today's competitive world of business, employees are required to manage projects with the management of people and teams being an integral activity. No two projects are the same and range from simple projects to the more complex with many employees, at all levels within an organisation, involved from project initiation through to implementation. This course provides an introduction to the people issues and basic techniques for effective Project Planning and Management implementation.

Aim:

The aim of this course is to provide a basic knowledge and understanding of Project Planning together with an introduction to Project Management theory. This includes techniques of planning, estimating and scheduling resources with an emphasis on the importance of costing, monitoring and communications for effective problem solving. Attendees should be working, or aspiring to work, in a business environment whereby the discipline of managing one or more discrete projects may be required.

Project Planning and Management Course has set the learning objectives in which, at the end of the course, participants are expected to be able to:

- Understand the role of management in development project
- Identify major management functions
- Understand the steps and the process in the Project Cycle Management (PCM)
- Understand the role and use of the Logical Framework Approach (LFA) and its matrix in planning, implementing, monitoring and evaluating development project
- Analyze the project environment
- Analyze an existing problem in one's area of responsibility in terms of causes and effects
- Set project objectives with clear indicators for progress and results measurement
- Design program to meet the objectives with identified strategies
- Systematically plan a schedule of project activities
- Plan for recruitment, selection and training of project staff as well as managing the conflict
- Prepare an itemized budget

- Understand the importance of a systematic monitoring and evaluation system
- Plan monitoring and evaluation activities of projects

This Project Planning and Management (PPM) training workshop consists of 5 modules of which details are as follows:

MODULE 1: Management Concepts (Management Vs Administration)

Administration can be defined as the universal process of efficiently organizing people and resources so to direct activities toward common goals and objectives. Administration is both an art and a science (if an inexact one), and arguably a craft, as administrators are judged ultimately by their performance. Administration must incorporate both leadership and vision

Management is viewed as a subset of administration, specifically associated with the technical and mundane elements within an organization's operation. It stands distinct from executive or strategic work. Management is closer to the employees. Administration is over the management and more over the money of the organization and licensing of an organization.

The verb *manage* comes from the Italian *maneggiare* (to handle — especially a horse), which in turn derives from the Latin *manus* (hand). The French word *management* (later *ménagement*) influenced the development in meaning of the English word *management* in the 17th and 18th centuries.

Management in business and human organization activity, in simple terms means the act of getting people together to accomplish desired goals. Management comprises planning, organizing, resourcing, leading or directing, and controlling an organization (a group of one or more people or entities) or effort for the purpose of accomplishing a goal. Resourcing encompasses the deployment and manipulation of human resources, financial resources, technological resources, and natural resources. Thus a good manager should be effective and efficient because may use the same resources and achieve the same target. Management can also refer to the person or people who perform the act(s) of management. Management operates through various functions, often classified as planning, organizing, leading/motivating and controlling.

Planning: deciding what needs to happen in the future (today, next week, next month, next year, over the next 5 years, etc.) and generating plans for action. (What to do?)

Organizing: (Implementation) making optimum use of the resources required to enable the successful carrying out of plans.

Staffing: Job analyzing, recruitment, and hiring individual for appropriate job.

Leading/Motivating: exhibiting skills in these areas for getting others to play an effective part in achieving plans.(To make individual work willingly in the organization)

Controlling/monitoring -- checking progress against plans, which may need modification based on feedback.

Factors for the differences between administration and management

<i>Factors</i>	<i>Administration</i>	<i>Management</i>
Nature of work	It is concerned about the determination of objectives and major policies of an organization.	It puts into action the policies and plans laid down by the administration.
Type of function	It is a determinative function.	It is an executive function.
Scope	It takes major decisions of an enterprise as a whole.	It takes decisions within the framework set by the administration.
Level of authority	It is a top-level activity.	It is a middle level activity.
Nature of status	It consists of owners who invest capital in and receive profits from an enterprise.	It is a group of managerial personnel who use their specialized knowledge to fulfill the objectives of an enterprise.
Nature of usage	It is popular with government, military, educational, and religious organizations.	It is used in business enterprises.
Decision making	Its decisions are influenced by public opinion, government policies, social, and religious factors.	Its decisions are influenced by the values, opinions, and beliefs of the managers.
Main functions	Planning and organizing functions are involved in it.	Motivating and controlling functions are involved in it.
Abilities	It needs administrative rather than technical abilities.	It requires technical activities

Managerial levels and hierarchy

Top-level management	<ul style="list-style-type: none"> • Require an extensive knowledge of management roles and skills. • They have to be very aware of external factors such as markets. • Their decisions are generally of a long-term nature • Their decisions are made using analytic, directive, conceptual and/or behavioral/participative processes • They are responsible for strategic decisions. • They have to chalk out the plan and see that plan may be effective in the future. • They are executive in nature.
Middle management	<ul style="list-style-type: none"> • Mid-level managers have a specialized understanding of certain managerial tasks. • They are responsible for carrying out the decisions made by top-level management.
Lower management	<ul style="list-style-type: none"> • This level of management ensures that the decisions and plans taken by the other two are carried out. • Lower-level managers' decisions are generally short-term ones

Foreman / lead hand	<ul style="list-style-type: none"> • They are people who have direct supervision over the working force in office factory, sales field or other workgroup or areas of activity.
Rank and File	<ul style="list-style-type: none"> • The responsibilities of the persons belonging to this group are even more restricted and more specific than those of the foreman

Leadership Styles

From Mahatma Gandhi to Jack Welch, and Martin Luther King to Rudolph Giuliani, there are as many leadership styles as there are leaders. Fortunately, business people and psychologists have developed useful, shorthand ways of describing the main leadership styles. This can help aspiring leaders to understand and adapt their own styles, so that they can improve their own leadership.

Whether you are managing a team at work, captaining your sports team or leading a major corporation, your leadership style is crucial to your success. Consciously, or subconsciously, you will no doubt use some of the leadership styles featured, at least some of the time. By understanding these leadership styles and their impact, you can become a more flexible, better leader.

Leadership style: is the manner and approach of providing direction, implementing plans, and motivating people. Kurt Lewin (1939) led a group of researchers to identify different styles of leadership.

The leadership styles we look at:

Autocratic Leadership

Autocratic leadership is an extreme form of transactional leadership, where a leader exerts high levels of power over his or her employees or team members. People within the team are given few opportunities for making suggestions, even if these would be in the team's or organization's interest. Most people tend to resent being treated like this. Because of this, autocratic leadership usually leads to high levels of absenteeism and staff turnover. Also, the team's output does not benefit from the creativity and experience of all team members, so many of the benefits of teamwork are lost. For some routine and unskilled jobs, however, this style can remain effective where the advantages of control outweigh the disadvantages.

Bureaucratic Leadership

Bureaucratic leaders work "by the book", ensuring that their staff follow procedures exactly. This is a very appropriate style for work involving serious safety risks (such as working with machinery, with toxic substances or at heights) or where large sums of money are involved (such as cash-handling). In other situations, the inflexibility and high levels of control exerted can demoralize staff, and can diminish the organizations ability to react to changing external circumstances.

Charismatic Leadership

A charismatic leadership style can appear similar to a transformational leadership style, in that the leader injects huge doses of enthusiasm into his or her team, and is very energetic in driving others forward. However, a charismatic leader can tend to believe more in him or herself than in their team. This can create a risk that a project, or even an entire organization, might collapse if the leader were to leave: In the eyes of their followers, success is tied up with the presence of the charismatic leader. As such, charismatic leadership carries great responsibility, and needs long-term commitment from the leader.

Democratic Leadership or Participative Leadership

Although a democratic leader will make the final decision, he or she invites other members of the team to contribute to the decision-making process. This not only increases job satisfaction by involving employees or team members in what's going on, but it also helps to develop people's skills. Employees and team members feel in control of their own destiny, and so are motivated to work hard by more than just a financial reward. As participation takes time, this style can lead to things happening more slowly than an autocratic approach, but often the end result is better. It can be most suitable where team working is essential, and quality is more important than speed to market or productivity.

Laissez-Faire Leadership

This French phrase means "leave it be" and is used to describe a leader who leaves his or her colleagues to get on with their work. It can be effective if the leader monitors what is being achieved and communicates this back to his or her team regularly. Most often, laissez-faire leadership works for teams in which the individuals are very experienced and skilled self-starters. Unfortunately, it can also refer to situations where managers are not exerting sufficient control.

People-Oriented Leadership or Relations-Oriented Leadership

This style of leadership is the opposite of task-oriented leadership: the leader is totally focused on organizing, supporting and developing the people in the leader's team. A participative style, it tends to lead to good teamwork and creative collaboration. However, taken to extremes, it can lead to failure to achieve the team's goals. In practice, most leaders use both task-oriented and people-oriented styles of leadership.

Servant Leadership

This term, coined by Robert Greenleaf in the 1970s, describes a leader who is often not formally recognized as such. When someone, at any level within an organization, leads simply by virtue of meeting the needs of his or her team, he or she is described as a "servant leader". In many ways, servant leadership is a form of democratic leadership, as the whole team tends to be involved in decision-making. Supporters of the servant leadership model suggest it is an important way ahead in a world where values are increasingly important, in which servant leaders achieve power on the basis of their values and ideals. Others believe that in competitive leadership situations, people practicing servant leadership will often find themselves left behind by leaders using other leadership styles.

Task-Oriented Leadership

A highly task-oriented leader focuses only on getting the job done, and can be quite autocratic. He or she will actively define the work and the roles required, put structures in place, plan, organize and monitor. However, as task-oriented leaders spare little thought for the well-being of their teams, this approach can suffer many of the flaws of autocratic leadership, with difficulties in motivating and retaining staff. Task-oriented leaders can benefit from an understanding of the Blake-Mouton Managerial Grid, which can help them identify specific areas for development that will help them involve people more.

Transactional Leadership

This style of leadership starts with the premise that team members agree to obey their leader totally when they take a job on: the “transaction” is (usually) that the organization pays the team members, in return for their effort and compliance. As such, the leader has the right to “punish” team members if their work doesn’t meet the pre-determined standard.

Team members can do little to improve their job satisfaction under transactional leadership. The leader could give team members some control of their income/reward by using incentives that encourage even higher standards or greater productivity. Alternatively a transactional leader could practice “management by exception”, whereby, rather than rewarding better work, he or she would take corrective action if the required standards were not met.

Transactional leadership is really just a way of managing rather a true leadership style, as the focus is on short-term tasks. It has serious limitations for knowledge-based or creative work, but remains a common style in many organizations.

Transformational Leadership

A person with this leadership style is a true leader who inspires his or her team with a shared vision of the future. Transformational leaders are highly visible, and spend a lot of time communicating. They don’t necessarily lead from the front, as they tend to delegate responsibility amongst their teams. While their enthusiasm is often infectious, they can need to be supported by “detail people”.

In many organizations, both transactional and transformational leadership are needed. The transactional leaders (or managers) ensure that routine work is done reliably, while the transformational leaders look after initiatives that add value. The transformational leadership style is the dominant leadership style taught in the "How to Lead: Discover the Leader Within You" leadership program, although we do recommend that other styles are brought as the situation demands.

Using the Right Style – Situational Leadership

While the Transformation Leadership approach is often highly effective, there is no one “right” way to lead or manage that suits all situations. To choose the most effective approach for you, you must consider:

- The skill levels and experience of the members of your team.
- The work involved (routine or new and creative).
- The organizational environment (stable or radically changing, conservative or adventurous).
- You own preferred or natural style.

- Internal conflicts and Stress levels.
- How much time is available

A good leader will find him or herself switching instinctively between styles according to the people and work they are dealing with. This is often referred to as “situational leadership”. For example, the manager of a small factory trains new machine operatives using a bureaucratic style to ensure operatives know the procedures that achieve the right standards of product quality and workplace safety. The same manager may adopt a more participative style of leadership when working on production line improvement with his or her team of supervisors. Although good leaders use all three styles, with one of them normally dominant, bad leaders tend to stick with one style.

How people work (Motivation theories)

McGregor sees Theory Y as the preferable model and management method, however he thought Theory Y was difficult to use in large-scale operations.

Theory Z - Ouchi

In 1981, William Ouchi came up with a variant that combined American and Japanese management practices together to form Theory Z, having the following characteristics: long-term employment - collective decision-making - individual responsibility - slow evaluation & promotion - implicit, informal control with explicit, formalized measures - moderately specialized career paths - and a holistic concern for the employee, including family.

Theory X and Y Description

Douglas McGregor, an American social psychologist, proposed his famous Theory X and Theory Y models in his book 'The Human Side Of Enterprise' (1960).

Theories	Theory X	Theory Y
Assumptions	Humans inherently dislike working and will try to avoid it if they can.	People view work as being as natural as play and rest. Humans expend the same amount of physical and mental effort in their work as in their private lives.
	Because people dislike work they have to be coerced or controlled by management and threatened so they work hard enough.	Provided people are motivated, they will be self-directing to the aims of the organization. Control and punishment are not the only mechanisms to let people perform.
	Average employees want to be directed.	Job satisfaction is key to engaging employees and ensuring their commitment.
	People don't like responsibility.	People learn to accept responsibility and seek responsibility. Average humans, under the proper conditions, will not only accept, but even naturally seek responsibility.
	Average humans are clear and unambiguous and want to feel secure at work.	People are imaginative and creative. Their ingenuity should be used to solve problems at work.
Application	Shop Floor, Mass Manufacturing. Production workers.	Professional Services, Knowledge Workers. Managers and Professionals.
Conducive to	Large scale efficient operations.	Management of Professionals, Participative Complex Problem Solving.
Management Style	Authoritarian, Hard Management.	Participative, Soft Management.

NB: Think how the above theories can be or not applied in a given situation

MODULE 2: Human Resource/ Personnel Management

Human resource management (HRM) is the strategic and coherent approach to the management of an organization's most valued assets – the people working there who individually and collectively contribute to the achievement of the objectives of the business. The terms "human resource management" and "human resources" (HR) have largely replaced the term "personnel management"

Personnel management is often used in a more restricted sense to describe activities that are necessary in the recruiting of a workforce, providing its members with payroll and benefits, and administrating their work-life needs. Thus humans are an organization's greatest assets; without them, everyday business functions such as managing cash flow, making business transactions, communicating through all forms of media, and dealing with customers could not be completed. Human resource management works to ensure that employees are able to meet the organization's goals.

Bolton T (1995) argues that HRM is a body of management thought developed in the 1997's and early 1980s and can be linked to the coming together of a number of factors:

- industrial restructuring
- changes in international competition and
- customers

"Human resource management is responsible for how people are treated in organizations. It is responsible for bringing people into the organization, helping them perform their work, compensating them for their labors, and solving problems that arise" (Cherrington, 1995, and ensures that employees are able to meet the organization's goal. Human resources management comprises several processes. These processes can be performed in an HR department, but some tasks can also be outsourced or performed by line-managers or other departments.

Characteristics of Human Resource Manager

- strategic fit (integration) the need to integrate business and HR strategies;
- coherence the need to adopt a coherence approach to the provision of mutually supporting and integrated HR policies and practices
- commitment –the need to gain the commitment of people to the organization's mission and values
- Treating people as assets or human capital to be invested in thorough training
- Corporate culture –the need for a strong corporate culture expressed in mission and value statements and performance management principles
- Unitary employees relations-the adoption of a unitaristic rather a pluralist approach with the emphasis on individual contracts rather than collective agreement.
- Management responsibility –they believe that HRM is an activity driven by top management and that performance and delivery of HRM is the business of line managers

Differences between Human Resource and Personnel Management

HRM	Personnel management
HRM emphasizes the participation of line managers	Personnel management emphasizes that management should be a preserve of personnel specialist
It is broader and resource centered	It is narrow and force centered
It is strategic i.e focuses on longer term interest of employees	It is short term and its focus is on welfare
It emphasizes on investment in people through training	Personnel management emphasizes less
It integrates business and human resource	Personnel management does not.

The core roles of human resource management are grouped below into three categories. The titles of the clusters are tentative, and are open for comment.

PLANNING AND ORGANISING FOR WORK, PEOPLE AND HRM

Strategic perspective
 Organization design
 Change management
 Corporate Wellness management

PEOPLE ACQUISITION AND DEVELOPMENT

Staffing the organization
 Training & development
 Career Management
 Performance Management
 Industrial relations

ADMINISTRATION OF POLICIES , PROGRAMMES & PRACTICES

Compensation management
 Information management
 Administrative management
 Financial management

The roles listed above are now described in terms of broad functions, activities and outcomes to illustrate more or less what the descriptions will look like once the Standard Generating Groups begin to work with each role in detail.

Planning and Organizing for Work, People and HRM

STRATEGIC PERSPECTIVE

- § Develop Human Resource plans and strategies aligned to the organization's strategic direction. and business strategy. Provide tools and tactics to enhance execution of these strategies
- § Integrate HRM with current and pending legislation and socio-political changes.
- § Integrate Human Resource Management with general organizational management.
- § Manage the interface between HRM processes and systems.
- § Formulate and communicate HRM policies.
- § Act as the conscience of employer with respect to people issues.
- § Scan the environment (both international and national) and identify emerging trends that will affect the organization and the management of people therein.
- § Assess the long-term impact of short-term decisions on people.
- § Manage people related issues accompanying mergers, alliances and acquisitions.
- § Express (embody) the philosophy and values regarding people management in the organization.

ORGANISATIONAL DESIGN

- § Analyze work processes and recommend improvements where necessary.
- § Recommend options for organizational design & structure.

CHANGE MANAGEMENT

§ Advise management on implications of change for employees.

§ Co-ordinate & facilitate the change process.

§ Facilitate changed relationships.

§ Provide support structures for employees during change.

§ Deliberate and proactive management of the changing environment and its implications for work and the organization.

CORPORATE WELLNESS MANAGEMENT

§ Develop and communicate policies and procedures with regard to the management of wellbeing

§ Manage occupational health and safety

§ Manage wellbeing (Employee Assistance programs & Health Promotion programs)

People Acquisition and Development

STAFFING THE ORGANISATION

As an example, each of the functions of this role is further unpacked in terms of activities.

Human Resource Planning (linked to strategic perspective)

- Determine long-term human resource needs.

- Assess current resources.

- Identify areas of need.

Determining requirements of jobs

- Appoint a representative committee with the task of conducting the job analysis. · Decide on the use of job analysis information.

- Decide on the sources of job analysis information.

- Decide on the method for job analysis.

- Review the information.

- Based on the outcomes of the job analysis, write job descriptions and job specifications

Recruitment of staff for the organisation

- Develop & implement recruiting strategy bearing in mind relevant legislation.

- Decide whether recruitment will take place externally or internally.

- Select methods of the recruitment (for example job posting, personnel agencies & advertising)

- Engage in recruitment.

Selection of human resources

- Develop and implement selection strategy in line with relevant legislation.

- Select appropriate tools for selection.

- Validate selection tools in line with legislation.

- Provide selection short list for line management to make a decision.

Placement of staff

- Place staff in ways that will have the potential to benefit both organisation and employee

Induction and orientation

- Act as a facilitator for induction and orientation of new employees

Management of atypical employment situations.

Management of termination

- Advise management regarding the strategic implications of terminating employment relationships.

- Conduct exit interviews.
- Develop a plan to replace competence lost.
- Analysis of staff turnover and advise management on pending problems and corrective action (where necessary).

TRAINING & DEVELOPMENT

- § Develop a training & development strategy according to the requirements of legislation and with the improvement of productivity and delivery as outcome.
- § Conduct a training needs-assessment including the assessment of prior learning and write training & development objectives based on the outcome thereof.
- § Conduct training & development.
- § Evaluate training & development with regard to the return on investment.
- § Promote training & development in the organisation.

CAREER MANAGEMENT

- § Design and implement a career management program aimed at integrating individual aspirations and organisational needs & realities.
- § Manage career-related issues in the organisation for example women, affirmative action and management of diversity with attention to legislation in this regard.
- § Manage career-related issues surrounding organisational restructuring, downsizing & outplacement including provision of support.

Performance Management/Performance Appraisal

According to (Casio, 1998) it is the systematic description of individual or group job relevant strength and weaknesses. Or a process of measuring and evaluating behaviour and assessing how well it matches expectations of the job. The method used to appraise employees varies from one organization to another.

Objectives of performance appraisals

- They provide information that is helpful in selection for promotion and reward
- They set out job objectives and ways to achieve them
- They assess the effectiveness of the organizations selection process and instruments
- They provide feedback to employees on how they are performing and hence a means for career development
- Help in improving efficiency and identifying training needs, help in decision making regarding retirement, manpower planning, disciplinary cases.

There are two types of performance management

- a) Open appraisals system, involves appraising employees with their full knowledge and participation in the process. This enables employees influence of the outcome and gives them opportunity for explanation regarding their rating
- b) Closed appraisal system where the employee is given a form to fill his particulars like date of birth, qualifications, number of children, then the form is returned to the personnel or HRM.

The appraisal cycle involves the following

- Planning i.e. establishing the standards and agreed upon by supervisor and job holder
- Monitoring-supervisor continuously assesses how his staff gets on during the year, encouraging, reviewing, motivating, and giving supportive ideas
- Reviewing,
- Communication where the manager discusses with his staff and communicates the achievements and aspirations as at the appraisal interview where goals were set
- Design and implement a performance management system linked to relevant HRM systems and aimed at contributing directly to the business strategy.
- Assess performance.
- Use outcome of performance assessment as the basis for decision-making in areas mentioned in point 1.
- Management of individual as well as collective labour (organisational) performance.

INDUSTRIAL RELATIONS

- § Develop and communicate industrial relations policies and procedures in line with legislation.
- § Involvement in grievance and disciplinary hearings
- § Lead negotiations (where necessary).
- § Implement termination procedures
- § Assessment and management of organizational climate and employee relations
- § Liaison with trade unions
- § Implementation of outcomes of collective bargaining and negotiation

Administration of Policies, Programmes & Practices

COMPENSATION MANAGEMENT

§ Develop compensation strategies and policies in line with legislation and the organization's business strategy.

§ Attach meaningful monetary values to posts in the organization ensuring that the organization's compensation is in line with market forces (this may be by means of traditional job evaluation or other methods such as skill or competency based pay).

§ Develop appropriate compensation systems for the organization.

§ Manage overall labour costs.

INFORMATION MANAGEMENT

§ Provide current information regarding employees to be used in the decision-making process and measurement of HRM's contribution to the organization.

§ Advise management regarding trends emerging from the data.

§ Conduct HRM research with the aim of solving problems in the organization.

ADMINISTRATIVE MANAGEMENT

§ Provide integrated HRM administration that is speedy & cost effective to receiver & administrator.

§ Integrated employee data management

FINANCIAL MANAGEMENT

§ Manage the budget for HRM functions (Training and development, IR compensation, Employment Equity).

§ Negotiate maximal funds for HR.

§ Add value to the organization by demonstrating a sound understanding of the complexity of business.

§ Measure the financial impact of human resource systems

Workforce Planning: In this time of budget cuts, downsizing, and an aging Federal workforce, workforce planning becomes extremely important to increasing agencies' overall ability to achieve their missions. Although few agencies have strong workforce planning systems in place, some are beginning to take steps in this direction. The Department of the Army has an automated civilian forecasting system that uses 15-year workforce data trends to project future employment patterns, up to 7 years. This is part of a developing workforce planning initiative. SSA has developed a methodology to predict the number of actual

Placement and Induction

PLACEMENT is the process by which a new employee is assigned the job for which he was selected. It usually begins with a probationary period. This period enables employee and employer to evaluate each other. At the end, the organization decides whether to retain and confirm employees or not. The employee like wise can determine to stay or leave

INDUCTION; Means introducing new employees to their jobs and the organization as whole. Company rules and regulations are given and employee is told how his job affects the performance of other units and entire organizational performance.

Induction process should entail the following

- **Information-** new employee must be informed about his duties and responsibilities vis a vis the organization and vice versa. This helps clear his/her doubts so that he can function intelligently.
- **Assistance-**All assistance in understanding the goals of the organization or developing attitudes and skills should be provided to ease adjustment.
- **Acceptance** –To generate goodwill and cooperation among his colleagues the new employee should be introduced. Helps him feel at ease in his new environment.
- **Assimilation-**New employees need to be encouraged to develop a positive attitude towards the system, its purposes, policies, procedures and personnel.

Generally, in small organizations—those with fewer than a hundred employees—there may not be an HR department, and so a line manager will be responsible for the functions of HRM. In large organizations—those with a hundred employees or more—a human resource manager will coordinate the HRM duties and report directly to the chief executive officer (CEO). HRM staff in larger organizations may include human resource generalists and human resource specialists. As the name implies, an HR generalist is routinely involved with all seven HRM functions, while the HR specialist focuses attention on only one of the seven responsibilities

It is necessary to understand the job analysis. An essential component of any HR unit, no matter the size, is the *job analysis*, which is completed to determine activities, skills, and knowledge required of an employee for a specific job. Job analyses are "performed on three occasions: (1) when the organization is first started, (2) when a new job is created, and (3) when a job is changed as a result of new methods, new procedures, or new technology" (Cherrington, 1995).

Jobs can be analyzed through the use of questionnaires, observations, interviews, employee recordings, or a combination of any of these methods. Two important tools used in defining the job are (1) a *job description*, which identifies the job, provides a listing of responsibilities and duties unique to the job, gives performance standards, and specifies necessary machines and equipment; and (2) the *job specification*, which states the minimum amount of education and experience needed for performing the job (Mondy and Noe, 1996).

MODULE 3: Procurement Management

Procurement can be defined as the purchase of merchandise or services at the optimum possible total cost in the correct amount and quality. These good and services are also purchased at the correct time and location for the express gain or use of government, company, business, or individuals by signing a contract.

Basic Concepts in Procurement

Back Charge: Cost of corrective action by purchaser and chargeable to the supplier under terms of the contract.

Bid Protest: Allows an unsuccessful supplier an opportunity to protest the award of a government contract to another supplier.

Bill of Lading: A receipt issued by a carrier for merchandise to be delivered to a party at some destination.

Constructive Change: Occurs when the PM's conduct enables performance differing from that prescribed by the contract. The PM's conduct in effecting constructive change may either be affirmative or a failure to act. Not part of change control of contract: For instance, if final product performs better than standard specified in contract, or if the PM increases the quality over and beyond what's stated in the contract.

Contract: A legal document of purchase or sale which is binding on both parties. When entering into a contract, the people involved must have **legal capacity** to do so. (the definition of legal capacity varies from state to state). **Consideration** must be provided to both parties (in other words, there must be sufficient cause to contract). There must be **mutual assent**.

Invitation for Bid (IFB): PMBOK equates this with Request for Proposal and recognizes that it may have a more specific meaning in certain application areas. (appropriate for high dollar, standard items.)

Low-ball: In order to get an award, a contractor may submit a bid that's unrealistically low.

Pink Team Review: A seller responds to an **RFP** by developing a proposal. For sanity purposes, the proposal is passed through the pink team once the outline is completed. The pink team looks at the outline through the perspective of the buyer. The purpose of the team is to catch problems with the proposal in the early stages.

Price Forecast: Based on information gathered and analyzed about demand and supply. This forecast provides a prediction of short and long term prices and the underlying reasons for those trends.

Red Team Review: Once the proposal is in draft form, it passes through a red team which again looks at the proposal through the buyer's perspective.

Reformation: A judicial remedy by which a court interprets the contract so as to express the real intention of the parties (this is different from changes to the contract)

Request for Proposal (RFP): A type of bid document used to solicit proposals from prospective sellers of products or services. In some application areas, it may have a more specific meaning. (appropriate for high dollar, non-standard items).

Request for Quotation (RFQ): PMBOK does not distinguish between RFQ and RFP. However, PMBOK does recognize that some application areas have a more specific meaning for RFQ (appropriate for low dollar items such as supplies and materials).

Statement of Work (SOW): Describes the portion of the product to be contracted. In general, this is different from the product description (which tends to be more broader). Under the circumstance where the seller is producing the entire product, the distinction between SOW and the product description becomes moot. Government terms: SOW is reserved for a procurement item that is a clearly specified product or service, and Statement of Requirements (SOR) is used for procuring an item that is presented as a problem to be solved.

Procurement: The purchasing of goods works and related services and consulting services.

Management: The development and use of entrusted and planned resources so as to produce the required results or coordination of human and material resource towards objective accomplishment.

Contract: An agreement between 2 or more parties where by each party promises to do or not to do something OR a transaction involving 2 or more individuals, whereby each has the reciprocal rights to demand performance of what is promised. The promise is enforceable by law and incorporates remedial rights.

Bid: Synonymous with tender' an offer to supply goods or works conforming to particular specifications.

Evaluation: Is a procedure used to assess bids for goods and works contracts in accordance with the assessment criteria to select the lowest evaluated bid for contract award. Also a procedure used to establish the ranking of consultants proposal applying evaluation criteria.

Evaluation Criteria: Detailed standards to judge the consultants proposals for the purposes of Selecting the best qualified consultants. Also Specifications, standards, requirements etc specified in bidding documents for use in determining the lowest responsive evaluated bird

Evaluation committee: Committee selected to evaluate bids or consultants proposals according to the specified evaluated criteria.

Guidelines: These are the policies, practices and procedures that specify the procurement of goods, works and related services and separately leads to the selection of consultants.

Pre-qualification: A formal procedure for screening potential bidders prior to invitations to bid on the basis of experience, resource capacity, and financial standing.

Post qualification: A procedure applied after bids have been evaluated to determine whether the lowest evaluated bidder has the capability and resources to carry out the contract effectively.

Responsive bid: Is one that conforms to all the terms, conditions and specifications of the bidding documents without material deviation or reservation.

Goods: A generic expression used to denote a particular category of items eg. raw materials, commodities, machinery. spare-parts, equipment, manufactured articles etc.. that are normally delivered in finished condition to specified technical or functional standards.

Definitions of logistics management:

1. Logistics management is that, part of the supply chain process that plans, implements and controls the efficient *flow* and storage of good, services and related information from the point of origin to the point of consumption in order to meet customers requirements (CLM 1998).

2. Logistics management is defined as the process of strategically managing the acquisition, involvement and storage of materials, parts and finished inventory (and the related information flows) through the organization and its marketing channels in such a way that current and future profitability is maximized, through the cost effective fulfillment of order (Lysons 2000): 47 quoting Gattorna 1994).

3. Logistics management in every real sense is management. The design of a system and accompanying operating policies to permit effective flow as well as the control coordination of that flow on an ongoing basis are the essential concerns of the logistics manager (Shapiro and Heskett (1985).

NB: A supply chain is a network of supplies and customs in which any business operates.

Functions of Logistics (Waters 1996)

- Procurement and Purchasing
- Traffic and transport
- Receiving
- Warehousing and stores
- Inventory control
- Materials handling
- Shipping
- Distribution
- Location
- Communication

Importance of Procurement Management

Procurement Management is very important -: not only projects but also organizations as well. This is because;

- Procurement planning is crucial for the timely and efficient implementation of a project
- It can and frequently does, require and consume significant inputs of professional expertise.
- Procurement can affect time, scope and cost for the project. This may affect the success of the project.
- A very high proportion of the project activities are provided by resources external to the client organizations.
- Modern management in private and public sector is increasingly emphasizing outsourcing, which means procurement management will continue to gain significance. Likewise the new requirement at local government level for district tender boards since 1997 through Local *Government Act*, prior to which tenders were exclusive to the central government.

NOTE:

1) Planning for implementation of a project involves

- a) Developing a work plan;
- b) Identifying the project elements

- c) Including how they would be carried out;
- d) Defining necessary resources:
- e) Determining the scheduled time for each e.g. high school. Construction project

2) Planning for Procurement of a Project starts at the project design stage and comprises of:

- a) A listing of the various works, consulting services and goods to be procured.
- b) An' Implementation table or bar chart indicating key dates (initial, intermediate and final) for each activity.
- c) A determination of the lead time required for each activity with is the time interval required between the first decisions on a specific procurement and when that procurement would be needed during the actual implementation of the project.
- d) Development of a monitoring system to ensure timely procurement decisions and where necessary, the appropriate follow-up actions, which should occur like in any other project.

3. The legal framework governing public procurement in Uganda includes

- a) Constitution of Uganda (1995)
 - Chapter 9 Finance
 - Chapter 149 — Public finance Act
 - Article 163 — Office of Auditor General
 - Article 119 Functions of Attorney General
 - Chapter 13 — Inspectorate of Government
- b) Local Government Act of 1997 (as amended in 2001)
- c) the local government financial and Accounting Regulations of 1998
- d) Public Procurement and Disposal of Public Assets Act 2003
- e) International Laws relating to procurement that include- Agreement on Government Procurement (GPA) World Bank Guideline.

Tasks of Stakeholders in Procurement

A manager has key tasks in procurement. These include:

1. Hire (if not already assigned) and supervise procurement staff.
2. Review National Procurement requirements and those of financing institutions.
3. Establish procurement strategy in collaboration with procurement specialist
 - Review deliverables and identify items for procurement.
 - Decide on methods of procurement (e.g. national, international).
 - identify donor requirements and incorporate those requirements in the plan.
 - Select the appropriate type of contracts.
 - Decide how the total procurement will be divided into separate contracts. Prepare a schedule of procurement
4. Supervise preparation of necessary procurements (announcements, letters, invitation to bid etc.)
5. Supervise planning and execution of bidding and selection process.
6. Supervise process of evaluating bids.
7. Supervise preparation and negotiations of contracts.
8. Supervise creation of procedures for management of contracts and disbursement of funds.

Role of Procurement specialists

- 1) Plans procurement strategy
- 2) Ensures bid procedures are followed and conform to legal requirements.
- 3) Modifies procurement plan to take new conditions into account.
- 4) Opens bid documents.
- 5) Evaluates bids.

Principles of Procurement

There are basically four general principles that apply to all types of procurement.

1) Transparency: Transparency relates to having: procurement process that is clearly defined and open to observation by both the participants and the general public. It is a way of helping ensure that public money is well spent and fairly allocated. In life, what we do with our own money is our business, but what we do with public money and how we spend public money is the government business. Hence, when we procure with public money, we are bound by government rules which have been developed to ensure that, not only are public funds wisely spent, but that citizens *perceive* that they are wisely spent.

2) Value/Economy: Cheapest is not always the best. Procurement methods should ensure that public gets the best overall value for its purchase. This means considering total cost of ownership, not just initial price during procurement. - Everyday experience' teaches that the cheapest is not always the best, or more exactly, the cheapest in first instance is not always the cheapest in the long run. -, The methods we adopt. Should ensure that we achieve the best overall value for the money that we spend.

3) Accountability: The public expects officials to spend its money wisely and officials may have to account to the public for their actions. Accountability involves recognition that one should be responsive and careful with public funds and be able to explain why and how public funds are *spent*.

4) Risk: In procurement process. If the bidders of the potential suppliers of consulting services or goods perceive a risk that they may have to bear their bids or offers will reflect that perception. As perceived risks become higher the bids or offers will become higher as the perception of risks becomes lower, bids or offers will lower. Remember that it is the risk as perceived by the potential bidders and suppliers that are important not the risk as perceived by the client or government department. Bidding documents should be prepared so that the risks as perceived by the potential bidders or suppliers are minimized. Bidders will increase their bids to take into account increased perception of risk (and Vice versa)

Types of Procurement

The term procurement can relate to works, consulting services or goods. Each of these (works, consulting services or goods) has distinct and different characteristics that determine how each one is procured.

1) Civil Works have the following characteristics

- Above ground components; whose quantities are known with certainty at bidding

- Sub-surface conditions; whose quantities are known only approximately at bidding can be specified completely.
- Works include construction of large buildings, roads, ports, dams, large irrigation systems, airports, tunnels, power stations, canals, pipelines etc. What is required for civil works can be specified unambiguously - in bidding documents, estimated quantities for the *various* items of work can be entered and all bidders can bid on the basis of the same specifications and the same estimated quantities and no judgment on their part is required. Therefore civil works are normally procured on the basis of competitive priced bidding.

2) Consulting Services

Consulting services can include a broad range of activities from e.g. engineering design to accounting services. Here the client attempts to buy certain attributes that are very important but difficult or even impossible to state in measurable terms and which would therefore be difficult to quantify. Attributes in this category include; skill, experience, maturity, leadership etc. which are human attributes and have to be assessed judgmentally. 'When we procure consulting services we buy; skills, Experience, leadership, knowledge, maturity etc. It is normally difficult to define the product clearly, so no basis exists for competitive bidding.

Therefore the desirable approach is to procure consulting services by inviting the- prospective suppliers of the consulting services to propose individuals or teams on the basis of the client specification of the work required. The proposals that are submitted are reviewed on the basis of their quality and the proposal with the best quality is selected and contract is negotiated. *Works* and consulting services are procured by almost diametrically opposite procurators: *Works* are Definable while Consulting Services are not definable in quantitative. *Works* are procured on the basis of competitive bidding while services are on the basis of quality.

3) Goods is generic expression used to denote a particular category of items included in projects such as raw materials, commodities, machinery & components, spare-p arts, equipment, petrochemicals, manufacture articles etc that are normally delivered in conditions to specified technical and functional standards

Categories/Methods for Procurement

1. Competitive Bidding: This can be international (full), limited international or national. This is the bidding where competition is mainly based on price. All bidders would be competent to execute the- proposed work (*i.e* their bids comply fully with- the bidding conditions) then the work/tender is awarded to the lowest bidder. All bidders are provided with bidding documents relating to same specifications and same quantities.

2)-International and Local Shopping: This method is based on a comparison of price quotations obtained from a few suppliers. This is appropriate- when procuring off-the shelf", items such as personal computers. Usually three quotations should be obtained to ensure competitive prices

3) Direct Contracting: This is the purchase without competition and is used *when* an existing contract for goods (procured by other methods) is extended to obtain additional, similar goods. Direct contacting can be used when the required goods are proprietary and are available from only

one source, It may also be used when need for fast delivery of goods exists such as when an emergency occurs (although shopping is preferred) .

4) International Competitive Bidding (ICB): This method of procurement is generally considered to be the most desirable and is preferred for procurement enhanced by the International Development Institutions such as World Bank- and IMF-.

Procurement Planning

- Process of identifying which project needs can be best met by procuring products or services outside the project organization. Involves knowing whether to procure, how to procure, what to procure, how much to procure, and when to procure.
- **Input includes:**
 - Scope statement
 - Product description
 - Procurement resources
 - Market conditions
 - Other planning Output
 - Constraints
 - Assumptions
- **Methods include:** make-or-buy analysis, expert judgment, and contract type selection (fixed, cost reimbursable, etc.).
- **Output includes:** Procurement management plan and statement of work (SOW) for each planned contract.

Solicitation Planning

- Process of preparing documents needed to support solicitation.
- **Input includes:** procurement management plan, SOW's, and other planning Output.
- **Methods include:** standard forms and expert judgment.
- **Output includes:**
 - Procurement documents such as IFB's, RFQ's, and RFP's.
 - Evaluation criteria: the criteria that will be used to rate or score proposals. The criteria may be subjective or objective.
 - Statement of work updates.

Solicitation

- The process of obtaining information (bids and proposals) from prospective sellers on how project needs can be met.
- Most of the actual effort in this process is expended by the prospective sellers, normally at little or no cost to the project.
- **Input includes:** procurement documents and qualified seller lists.
- **Methods include:** bidders conferences and advertising.

- **Output includes:** Proposals prepared by the sellers explaining how the seller can provide the requested product or service.

Source Selection

- The process of receiving the bids and proposals from the sellers and applying the evaluation criteria to select a provider.
- **Input includes:** proposals, evaluation criteria, and organizational policies.
- **Methods include:**
 - **Contract negotiation.**
 - **Weighting system:** A method for quantifying qualitative data in order to minimize personal prejudice on source selection.
 - **Screening system:** Involves establishing minimum requirements of performance for one or more of the evaluation criteria. For example, the seller project manager must be certified before the remainder of the proposal would be considered.
 - **Independent estimates:** The procuring organization may prepare its own estimates as a check on proposed pricing. These estimates are generally referred to as *should cost* estimates.
- **Output includes:** Contract.

Contract Administration

- The process of ensuring that the seller's performance meets contractual requirements.
- **Input includes:** contract, work results, change requests, and seller invoices.
- **Methods includes:** contract change control system, performance reporting, and payment system.
- **Output includes:** correspondence, contract changes, and payment requests.

Contract Closeout

- The process of completing and settling the contract including any resolution of open items.
- **Input includes:** contract documentation.
- **Methods include:** procurement audits.
- **Output includes:** contract file and formal acceptance and closure.

Contract Origination

Unilaterally:

- Common form for contract is a relatively simple type of document called a purchase order.
- A purchase order is used when routine, standard cost items are needed.
- A purchase order is legally binding and should be specific.

Bilaterally:

Procurement documents are used to solicit proposals from prospective sellers. The procurement document then becomes the basis for the seller's proposal. The following are examples of procurement document

MODULE 4: Communication Skills

It's a Process of passing information from one person to another. However, communication goes beyond just passing on information, it involves dialogue, transmitting and sharing ideas, opinions, facts and information which should be perceived and understood by the receiver. Here, there is meaningful interaction among people and thoughts are transferred from one person to another and the value and meaning are still the same between the two communicating. What can be shared in communication?

- Feelings
- Attitudes
- Opinions
- Facts
- Beliefs
- Hopes
- Knowledge Etc

For management to perform its functions successfully there must be effective communication. Many operations fail because of poor communication, misunderstood messages and unclear instructions. Thus communication is a two way system by which one can communicate with people and not two people. Similarly, each person communicates constantly by what he or she says and does not say and by what he/she does and does not do.

One way and two way communication

This is the communication where information flow is from only one source. It involves directions, orders, no questions as a result the sender is seen as a dictator and the receiver looks a fool ,disturbed ,powerless, loses respect and confidence, gets bored etc. however, there is one way communication from religious bodies.

Two way communications

This is a system of communication where the sender and the receiver exchange views, ideas and discuss openly and freely. This communication involves asking questions, arguments and the decision is reached at. This is the most effective communication and it creates mutual understanding, confidence, trust, friendship and hope among the communicators. This duo/multi-communication is called dialogue where as the one way system is monologue communication system.

Learning to listen

Learning is one of the most challenging practices that must be done by anybody claiming to be a good communicator. It involves and demands 'whole self' mentally/psychologically and physically.

Qualities of a good listener

- Respectful
- Accepting
- One who shows interest in the topic
- One maintaining eye contact
- Openness
- Humble, compassionate
- Accommodative
- Ready to surrender ill formed opinions etc

Barriers to listening

- Difficult language
- Boring speaker
- Proud speaker
- Unclear message
- Long statements
- Noises
- Too many ideas at a time.

Objectives of communication

- To develop information and understanding among all workers
- To foster any attitude necessary for motivation, co-operation and job satisfaction
- To discourage misinformation, ambiguity and rumours
- To prepare workers for a change in methods of environment by giving them the necessary information in advance.
- To encourage subordinates to supply ideas and suggestions for improving upon the product of work environment
- To improve labor management relations by keeping the communication channels open.
- To encourage social relations among workers by encouraging inter-communication.

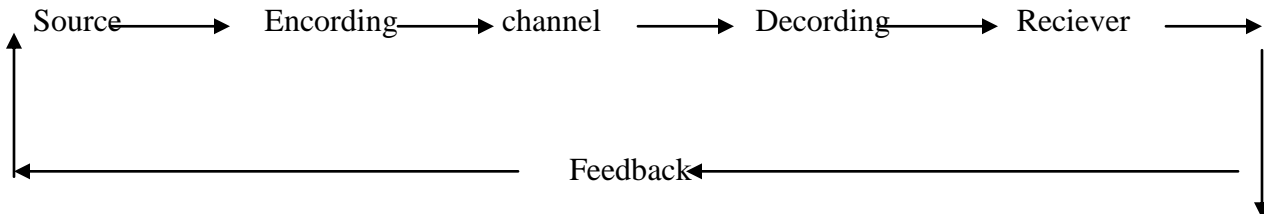
Levels of communication

1. **Intrapersonal communication.** This is the communication with in oneself. It is this type of communication that enables one to formulate what to communicate to other people. This type of communication is in form of dreams, personal research and intuitive thinking. After the message has been formulated, then it is packed for dissemination.
2. **Interpersonal communication** is the communication between two people. This takes place in everyday life. Two people conversing on phone, on face to face etc .In this type of communication, various forms are applied; these are verbal and non verbal as well as written communication. Care should be taken to avoid the common mistakes. These are poor handwriting, use of jargon which is not known to the other person, signs and symbols should be chosen carefully with culture in mind and the list is endless.
3. **Group communication** should be divided into small group (about 3 to 10 people) and a large group(over 10 people).This communication should thoroughly be researched and barriers to communication be taken into account. This communication is in form of group discussions,

religious congregations, meetings etc. the difference between group communication and mass communication is the former can have a rapport with the audience and receive a faster feedback than the latter.

4. **Mass communication** is the communication to a larger audience normally not known to the communicator. this type of communication is done through news papers, radio programs, television etc.

Model of communication process



The sender is the source of the message and originates the message or thought or idea and initiates the process of communication. The sender has a purpose and reason or desire to send information to somebody.

Encoding which is transforming into symbols. The idea or thought transformed into symbols in form of words, gestures with the same meaning

Message: what the source has encoded, it may be oral, written or felt by touch.

Channel the way the message can be transmitted; this may be on paper, telephone, cameras and videos for visual. For communication to be effective the sender must choose the appropriate channel

Decoding or interpretation: the receiver interprets and translates into meaningful information. Thus communication is effective if the receiver decoding matches with the sender's intended message and meaning

Receiver: one who receives the message from the sender (analyzing and acting feedback?)

Feedback (Decision and Action) the only way to confirm that the message has been transmitted

Types of communication

The most common types of communication are Verbal, nonverbal and written.

Verbal communication: this done by mouth, spoken words in a language that is understood by the person one is communicating with. It is face to face interaction through formal and informal contacts, conversation, interviews, discussions and talks, video-conference etc

Advantages

- direct, simple, time saving ,and least expensive
- allows for feedback and spontaneous thinking
- helps in avoiding delays and other formalities
- conveys personal warmth and friendliness
- misunderstanding can be cleared

Disadvantages

- Non formal record of transaction
- Distortion can occur if verbal message is passed along the hierarchical chain of command
- Length and distant communication can not be effectively conveyed
- Perception may be different from the intended message.

Non verbal communication

The messages are conveyed through body language. These are gestures such as: body movements, eye movements/contacts, hand signal, head nodding or shaking and facial expression.

Written communication

Communication is put down in writing. The written words are in form of mails, reports, minutes, rules and regulations, bulletin.

Advantages

- Serves as evidence of events and proceedings
- Provides permanent record for future references
- Reduces possibility of misunderstanding and misinterpretations
- Time saving when contacting many people
- Reliable for transmitting length statistical data
- Appears formal and authoritative for action
- Can be checked for accuracy unlike verbal communication

Disadvantages

- Time consuming for lengthy reports
- No immediate feedback opportunity to ensure the receiver understood the message
- Written material may leak out before time, causing disruption in its effectiveness
- Leads to excessive formalities in personal relations.

Characteristics/ qualities of good communication

- Relevant for its purpose
- Sufficient accurate for its purpose
- Complete enough for the problem
- From a source in which the user has confidence
- Communicated to the right person
- Communicated in time for its purpose

- That which contains the right level of detail
- Communicated by an appropriate channel of communication
- That which is understandable by the user.

Barriers to Effective Communication

Communication must be interpreted and understood in the same which was intended by the sender. Otherwise, it will give a different result and there will be a communication breakdown. However there are some bottlenecks to effective communication and they are below:

Noise Barriers

It is any external factor, which interferes with the effectiveness of communication. It does so by destructing, blocking part of the message or diluting the strength of communication e.g. accents, poor/ illegible writing, poor picture quality, actual physical noise.

- a) Semantic barriers .differences in interpretations of words and symbols. Poor choice of words, wrong words and comas, spelling mistakes.
- b) Feedback barriers
- c) Cultural barriers ; It happens because of cultural differences in an organization like in multinational company
- d) Perception ;relating to the process through which we receive and interpret information from our environment and create a meaningful word out of it
- e) Stereotyping, basing on a single trait, having similar perception
- f) Lack of sender credibility
- g) Use of mult-meaning words
- h) Lack of access to the right channel
- i) Language barriers
- j) Unclear message
- k) Interruption
- l) Overloaded or long messages
- m) Intermediaries in the communication process
- n) Disinterest from the listener
- o) unnecessary information
- p) Joking, anger, silence, false agreement etc

How to Overcome the Communication Barriers

- Feedback –reduces misunderstanding and shows that information is accurate. It is a two way communication process.
- Improve listening skills- listening is a very important part of the communication process. and it is an active mental process, which goes beyond hearing it leads to better understanding and good relationship with each other
- Develop writing skills-be precise and clear. clear messages reduces semantic perception barriers, eliminates misunderstanding and misinterpretation
- Avoid credibility gaps- there must be an understanding between managers and subordinates.

Guidelines for Effective Communication

- The ideas and messages should be clear, brief and precise
- Sense of timing
- Integrity
- Consult with others who are involved in planning the communication
- Be prepared to help the receiver
- Mode of delivery
- Use proper follow-up
- Communication should be comprehensive

To be a successful communicator

- Use your voice effectively
- Know your subject
- Know what you want to say
- Prepare your message carefully
- Arrange your points logically
- Display interest and enthusiasm
- Sound convincing and sincere

How To Record Useful Meeting Minutes

Do your hands cramp up at the thought of recording meeting minutes? Do you question what information you should record and what you should leave out? You're not alone. Most of us have sat through a meeting madly scribbling what we thought. "were minutes only to find out later that & e missed essential information or that the notes were never used.

Why Meeting Minutes Matter

Don't give up, meeting minutes are important. They capture the essential information of a meeting - decisions and assigned actions. They keep attendees on track by reminding them of their role in a project and clearly define what happened in a group session. How many times have your colleagues been confused or in disagreement about what happened in a meeting? With minutes to refer to, everyone is clear. What most people don't know is that meeting minutes shouldn't be *an exact recording of everything that happened during a session*. Minutes are meant to record basic information such as the actions assigned and decisions made. Then, they can be saved and used for reference, or background material for future meetings relating to the same topic.

Helpful instructions to take useful and concise meeting minutes

a) Before the Meeting:

- i. If you are recording the minutes, make sure you aren't a major participant in the meeting; you can't perform both tasks well.
- ii. Create a template for recording your meeting minutes and make sure you leave some blank space to record your notes. Include the following information:

- Date and time of the meeting
- The purpose of the meeting
- The meeting lead or chair's name
- Assigned action items
- Decisions made

iii Before the meeting, gather as much information from the host as you can. Ask for a list of attendees, as well as some information on the purpose of the meeting. This way you won't need to scramble to understand what's going on while you're recording notes.

iv. Decide how you want to record your notes. If you aren't comfortable relying on your pen and notepad, try using a tape recorder or, if you're a fast typist, take a laptop to the meeting.

b) During the Meeting

i. As people enter the room, check off their names on your attendee list. Ask the meeting lead to introduce you to a meeting with attendees you aren't familiar with. This will be helpful later when you are recording assigned tasks or decisions.

ii. Don't try to record notes verbatim — if not necessary. Minutes are meant to give an outline of what happened in the meeting, not a record of who said what. Focus on understanding what's being discussed and on recording what's been assigned or decided on.

iii. Record action items and decisions in your template as they happen — don't wait until after the meeting to pull them out of your notes or you could make a mistake. If you don't understand exactly what decision has been made or what action has been assigned ask the meeting lead to clarify.

c) After the Meeting

i. Review the notes and add additional comments, or clarify what you didn't understand right after the meeting. Do this while the information is fresh in everyone's mind. Type your notes out in the template you created before the meeting — this will make the notes easier for everyone to read and use. When you're writing out your notes, use some of the following tips from the International Association of Administrative Professionals (IAAP).

ii. Number the pages as you go so you aren't confused later. Remember, though, that the minute-taker is responsible for providing good flow. Don't force yourself to write the minutes in the actual chronological order of the discussion - it may not work. - Focus on action items, not discussion. The purpose of minutes is to define decisions made and to record what actions are to be taken by whom and when.

iii. Be objective. Write in the same tense throughout and avoid using people's names except for motions or seconds. This is a business document, not about who said what. - Avoid inflammatory or personal observations. The fewer adjectives or adverbs you use, the better. Dull writing is the key to appropriate minutes. - If you need to refer to other documents. Attach them in an appendix or indicate where they may be found. Don't rewrite their intent or try to summarize them. When you finish typing the minutes, ask the meeting lead to review the document

for errors. Send the final copy of the minutes to attendees right away. Keep a copy of the notes (and the template) for yourself in case someone wants to review them later.

iv. Recording meeting minutes ensures that the decisions and actions resulting from a meeting aren't lost or forgotten. By taking the time to record proper meeting notes you'll make sure the time and effort that goes into a meeting isn't wasted.

Writing A Report

A report is information which has been thoroughly researched and presented in an orderly manner either orally or in written form. An oral report is simple and brief It is presented by word of mouth. However, the way one communicates here plays a very important role for it can easily be denied or misinterpreted. A written report on the other hand is a record of what has taken place. It can be short or long, can be kept as a permanent record and there is no fear of distortion. What has been documented cannot be denied.

Qualities Of A Good Report

Is about one clearly defined subject

- Is accurate and up to date
- Includes everything the reader needs to know
- Omits irrelevant information
- Is easy to read and understand Is clearly presented
- Follows the required format -Is written in a concise and simple style
- Is well organized and logical in its structure
- Does not contain too much jargon or technical detail

Presentation

- A report should be easier to read than an essay or article
- Will probably be read by several people Needs to be read quickly
- Needs to show links and connections
- Needs to be referred to quickly
- Will not always be read from start to finish
- Headings Numbering/indexing Layout indentations and spacing Typeface - plain or bold, underlined
- Be consistent

Style And Tone

- Factual • Objective
- Impersonal - passive constructions. the files were examined"
- Avoid personal pronouns, **I**, we, you
- Neutral no emotive words or expressions

Language

- Accurate
- Formal, appropriate
- Clear, unambiguous
- Simple
- Precise

Key Checklist

- Does it fulfill its purpose?
- is the structure correct?
- is all the information in the right selection?
- Is it set out properly and clearly
- Is its overall progression logical -Is it easy to read and follow?

MODULE 5: Project Planning / the Project Cycle

What is a project?

A project is a set of activities with a definite beginning and ending point. The activities must be done in a particular order and they take place in real time. The key concept that differentiates project planning from other types of planning is that the project is a one-time occurrence, an occurrence that will not be repeated daily.

A project is set of activities that must be coordinated and managed to achieve a specified objective. A project is time bound and is designed to deliver measurable benefits to a specified target group. Projects are the practical interventions that are designed to link policy and program objectives to problems faced by a particular group of beneficiaries. Program is mostly designed by a government or big organization (institutions). There fore programs are bigger than projects (projects subset of program)

Characteristics of a project

- Its time bound
- Must have targets to achieve (objectives)
- Must have a Budget

Types of projects and programs

1) Relief or humanitarian projects e.g. floods, earth quake victims

2) Rehabilitation and reconstruction projects e.g. building of houses, expansion of houses, replacement or repair

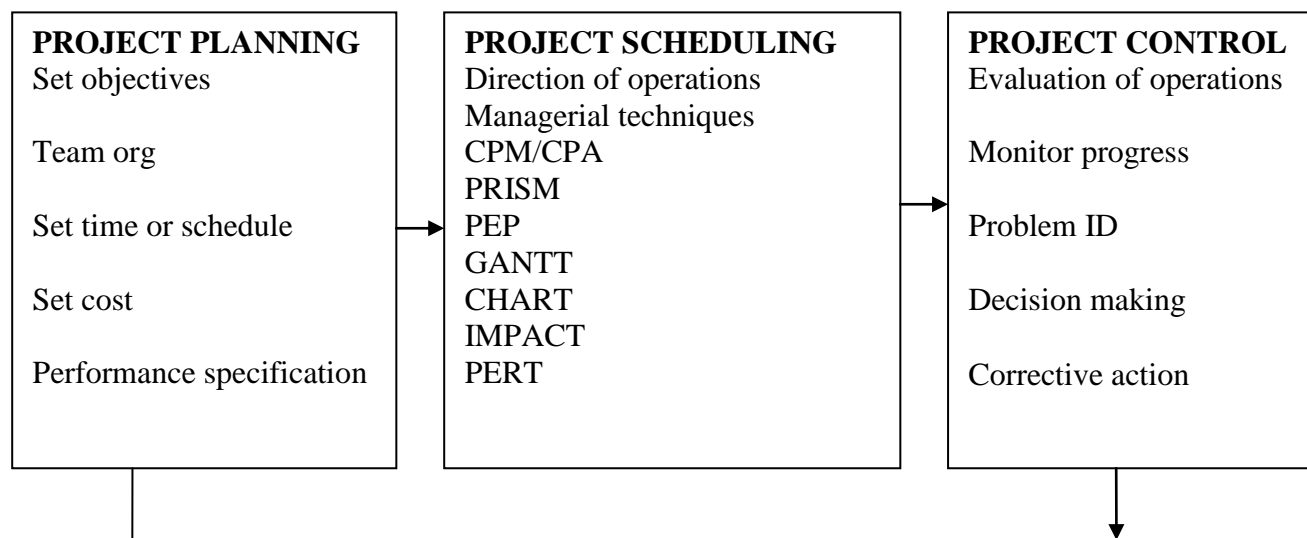
3) Social development or community development projects e.g. education services, clean and safe water, Health center

4) Economic/ commercial projects aimed at creating wealth towards improvement of economic conditions of individuals and communities and nations. Priority is given to those projects which are normally included in the presidential manifesto including those that are of immediate response like Health.

Project Planning and Control

It is a special case of general planning and this includes all those activities that result in developing a course of action. These activities guide future decision making, in project planning these planning activities guide the manager in future decision making about a specific project. Project planning is done in phases, goals for the project including resources to be committed, completion times and results must be set and priorities established. Actual work responsibilities must be identified and assigned. Time estimates and resources required to perform the work activities must be forecast, Budgets are very useful in planning projects and in controlling their costs. Finally, the project manager must make policies to determine which activities are most critical for project completion, how resources should be used and how additional monies for “crash” completion, should that course of action become necessary should be spent.

Project Planning and Control Flow Chart



Key issues

- PLANNING
- PERFORMANCE

There are three principal dimensions of the project and these three dimensions form the triple constraint concept in project management. The dimension include

- o Performance specification - scope
- o Time or schedule - time
- o Budget or money - cost

Defining the Scope

- When you define the scope of a Program or Project, you set the ‘boundaries’
- What is included and what is excluded. In order to scope the Program or Project, the following questions are addressed:
- What is the Program/Project responsible for delivering? What is the Program/Project not going to deliver?
- What are the main objectives? Why are you doing it?
- What needs to change in order to achieve these objectives?
- What will the effect of those changes be?;
- What will stay the same?;
- What other work or Programmes/Projects are there which might impact on this? You must agree boundaries, avoid duplication or omission of tasks or deliverables;
- Whose responsibility is it to put in place longer term mechanisms/reviews to evaluate the Program/Project?

The answers to these questions helps define the scope of the Program/Project and the interfaces needed to establish with other Programmes/Projects and stakeholders. Knowing what is included and what is excluded is fundamental for planning a Program or Project

The Project Management Life Cycle has four phases: Initiation, planning, Execution and Closure. To pass through each project life cycle phase successfully, you’ll need to complete a number of project activities. Each activity is listed below, providing you with an entire project management methodology for your use.

Project Management Process

1. Initiate
2. Define
3. Plan
4. Implement
5. Control
6. Monitor and Evaluate
7. Complete
8. Review

The first, two steps are not necessarily separate and sequential except when project initiator issues a firm, complete and unambiguous statement of desired project output in which case the organization that will carry out project may start to plan how to achieve it. It is more common to start with a proposed work definition which is then jointly renegotiated after preliminary planning elucidates some consequences of the initially proposed work definition. In fact the implementation phase must be considered before planning can be finished. Nevertheless the 5 steps process covers each required action and is a useful conceptual sequence in which to consider project management. The triple constraint, an extremely important notion for project management provides the defining parameters of a project.

The project cycle consists of the following steps

- indicative programming (IND)

- project Identification (ID)
- project Formulation (FOR)
- project Funding
- project Implementation
- project Evaluation

It is cyclical where activities or processes gone through at each step are similar and can be repeated for any project.

1. Indicative programming (IND) it sets the general lines of interventions of the organization, considering which priorities will be taken or chosen and how many projects could be handled according to the internal capacity of the organization etc.

2. Identification (ID) Here the project is defined as an idea or a possibility worthy of further investigation and study. And these ideas may come from the discovery of resources which could be exploited and needs or demands to be satisfied arising from analysis of existing problems. However many project ideas may be identified than can be handled through the project management cycle, there is usually a need for prioritization at this stage. And this prioritization may be based on criteria as most important, most urgent, least costly, most easily achievable or any combination of such factors.

3. Formulations. In project preparation stage where the priority project idea is planned covering such aspects as size, location, technical details, markets and institutional arrangements. Within the formulation phase certain clearly defined stages can normally be distinguished namely; outline design, Appraisal and detailed.

In the outline design preparation is carried out to a sufficient level of detail to allow the determination of technical, social and organizational aspects of the project; like environmental, administrative, gender or political impacts may have to be considered.

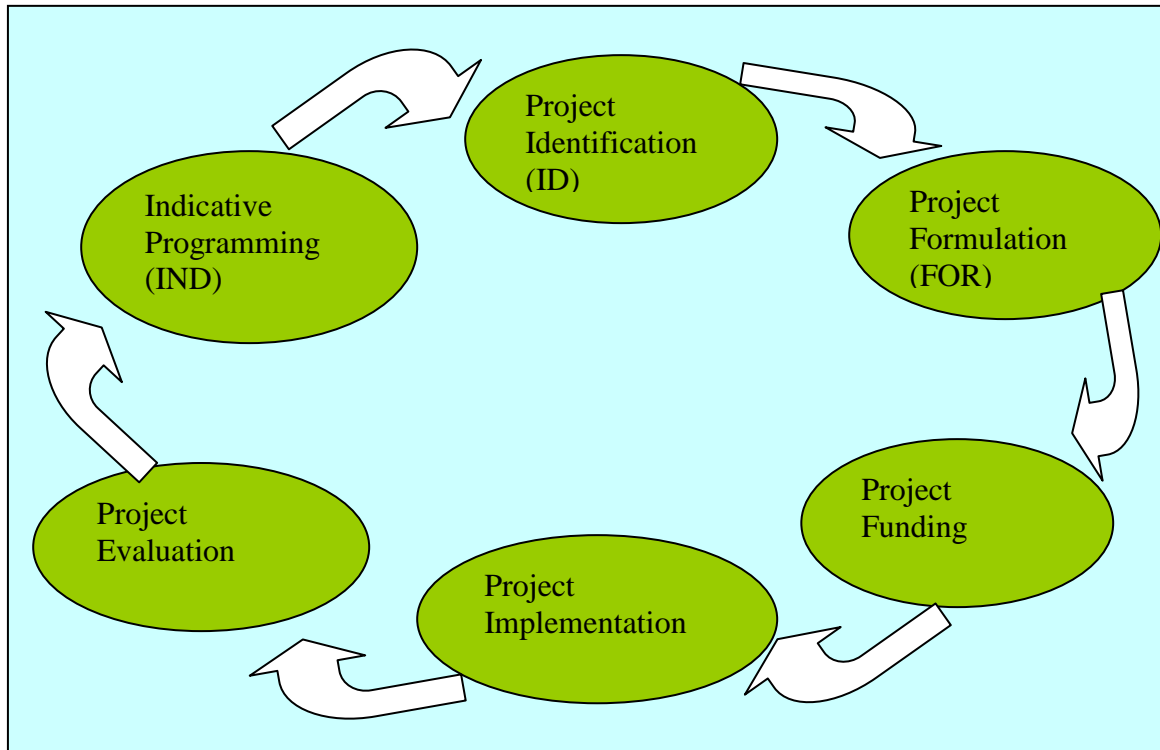
Formal appraisal; exercise is often done when external funding or aid funds are involved. And the decision making implied makes appraisal necessary for any project preparation phase in order to allow project workers to continually review and refine their proposals.

Detailed design for implementation to go ahead is made following the appraisal of the project plans, and a decision to proceed. This design will include procedures and construction documents for the required physical facilities and building depending on the type of project.

4 Financing/ project funding: After successful appraisal and approval for loan consideration, the project plan may be subjected to further negotiations for loan disbursement.

5. Implementation: This is the stage at which the institutional framework for the project is established and facilities constructed. And this stage may involve largest disbursement of funds

6. Evaluation: This consists of investigating and reviewing the effects of the completed project, to determine whether the benefits which were planned to flow from it have indeed been realized and whether these benefits have had their intended consequences or have had impacts



Make cyclical for steps

Format for Project Proposal Writing

Any project proposal aimed at soliciting for funding must strictly follow the specific format of the possible donor, Format for project proposal for funding differs from donor to donor Nonetheless there are common elements in all the formats. It is therefore possible to give a general guideline of a basic format derived from our understanding of development planning and the integrated project management cycle just described.

1. Title

should be simple and clear, reflecting the authors understanding of the meaning of Project as distinct from program. Using the name of an organization as a project Title is unacceptable.

2. Executive Summary

It is a summary of the written proposal. It must consist salient points or critical elements in the proposal, the kind of things which a donor, selecting proposals for funding would want to know before reading the rest of the proposal, if time is available. Usually time is limited as the donor has to look at several proposals. A good summary should answer at least the following questions

- The project being proposed?
- Where it is located?
- What is the duration of the project?
- What the project is supposed to achieve?
- Who are the beneficiaries
- Who the implementers?
- What is the total cost of implementing the project?
- What are the sources of funding?
- What plan is in place for the sustainability of the project

3. Back Ground

A clear description of the geographical location of the project site, the population and demographic characteristics of the local community, and the cultural and socio—economic situations in the area, This should provide a good context and scenario for the project being proposed.

4. Problems and Needs

This is where a careful conceptualization is made of the needs to be addressed arising from the various development problems faced by the project beneficiaries, The causes—effects of these problems should be carefully analyzed. Project ideas are directed to the root causes of the problems, not the symptoms.

5. Selected Project

in the above several cases of action (or project ideas) would have been identified; these project ideas have to be prioritized in order to select the optimal courses of action to meet the identified needs. This step therefore represents the ability to priorities and selects the project which is on the top of the priority list using certain criteria which must be mentioned here,

6. Beneficiaries and Benefits

This is a description of who will gain from the project being formulated both directly and indirectly, and of what the gains will be.

7. Aim

This is the long—term desired situation that is to be achieved through several activities

8. Objectives

These are immediate targets, easily translated into concrete activities whose achievements will lead to the fulfillment of the project AIM. Objectives are specific, Measurable, achieved, Realistic and Time - bound (SMART)

9. Justification

This is to state why the project should be carried out now. Those are the preconditions which favor the implementation of this project in terms of local needs and aspirations. Available inputs, and existing government policy and socio—economic situation,

10. Outputs

these are the expected outcome from the successful implementation of the project. They should now evidence that the objectives have been achieved. They are directly lined to the activities required to achieve the objectives

11. Activities

These are actions or processes to be carried out in order produce the desired or expected outcome, leading to the achievement of the oh objectives

12. Work plan

This is the time—table for implementation of the project It involves giving each activity a time frame i.e. when to start and when to end, Usually some techniques of scheduling the activities like, Gantt chart, may be used

13. Strategies For Project Implementation And Operations

These entail identifying the project implementation team and evolving an organizational and administrative setup to successfully implement the project The strategies should include monitoring supervision and control during project orientation as well as arrangement for end of project(or ex post) evaluations

14. Inputs

These are all the resources required for the actions and processes to undertaken during project implementation and operation

15. Budget

This is an estimate of the cost of inputs in financial terms Under the budget estimates sources of funding or project financing plan should be indicated

16. Follow Up Plan

This is a statement of what you plan to do after implementing the project successfully It should reflect some sense of activity

Feasibility Study and its Components

It is the study aimed at data and information to determining the viability/ possibility and it's determine very comprehensive

Financial Feasibility

- Materials and inputs
- Production technology/appropriate technology
- Product mix-4ps: price, product(good, service), place (distribution channels) and promotion

- Plant capacity(include; Feasibility, availability capacity)
- Location site
- Machinery/ equipment(electrical, mechanical, processing equipments)
- Structures and civil works like parking yards, fence, flower gardens, stores and garages)

Financial Feasibility

- Cost of project
- Sources of budgeting/means of financing: grants, shares, loans, donations, savings, trade Credits, debentures, debt financing}.
- Cost of capital- interest on borrowed money
- Profitability
- Tax burden-VAT,PAYE or Graduated tax, income, excise and custom
- Financial projections/ flows- balance sheet, cash flow, income statement

Debentures- grant got after guaranteed by an organization.

Trade credits- goods taken on credits, then payments made later.

Debt financing- borrow from one to pay the other

Economic Feasibility

- Level of savings
- Level of investment
- Costs of benefits
- Level of employment
- Forex earnings(forex exchange)
- Government revenue
- Production capacity
- Pricing policy

Political feasibility

- Government programs, policies
- Legal frame work-laws,-regulations etc

Market Feasibility

- Market share e.g. MTN, Zain, Mango/UTL, Warid, Coke, Pepsi
- Aggregate demand i.e. who are you targeting
- Supply and competition
- Imports and exports
- Consumer preferences and attitudes
- Market policies

Social Feasibility

- Culture
- Religion
- Demographic factors(sex, age)
- Community support like attitude.
 - Leadership structure- schools, roads, hospitals)
 - Quality of life

Environmental feasibility (EIA)

- Natural (God made resources)
 - Social (environment within social: culture, language, colour (race)
- Man made (fashion, luxury, car, house, planes)
 - Shadow price (price that you can't see)
 - Recycling of wastes

Gender feasibility

- -Participation
- -Decision making
- -Roles and responsibility
- -Access to resources by both sexes
- -Power (dominion)

MODULE 6: Logical Framework Approach (LFA)

Basic Principles;

1. The Logical Framework should be concise. It should not normally take up more than two sides of paper.
2. The Logical Framework should be treated as a free-standing document and should be comprehensible to those coming to it for the first time. Acronyms should therefore be avoided.
3. If beneficiaries are included in the project, they should also take part in the design of the Logical Framework.
4. The Logical Framework will provide a basis for subsequent monitoring and evaluation. It must therefore be kept under regular review and amended whenever the project changes course. The Log Frame is a document; the Logical Framework Approach is a project design methodology. All three terms refer to a structured meeting process which we will refer to as LFA.

Logical framework document

The logical framework document is a 4 column by 4 row matrix. The cells of the matrix contain text that describes the most important features of a project. And its some times referred to matrix .LFM approach involve situation analysis, stakeholder analysis and developing hierarchy objectives and selecting a preferred implementation strategy.

Logical Frame Work Matrix

Narrative Summary	Objectively verifiable Indicators – OVIs	Means of verification MOVs	Risks and Assumptions
Goal			
Purpose			
Outputs(Results) 1. 2.			
Activities 1. 2.			
Inputs 1. 2.			

Objectively Verifiable Indicators (OVIs): These are the measures, direct or indirect that will verify to what extent the objectives have been fulfilled. The term objectively implies that if these should be specified in a way that is independent of possible bias of the observer.

Means of Verification (MOVs): These statements specify source of the information or the measurements or verification specified in the indicators column. For example will statistics from an external source be used for the verification or will project resources be used to gather the statistics.

External Factors (Assumptions): These are important events, conditions, or decisions which are necessarily outside the control at the project, but which must remain favorable for the project objective to be attained. The implication here is the design team has an obligation to consider what might derail their efforts and to plan responsibly to reduce that risk of derailment.

Development Objective (Goal): The higher level objective that the project is expected to contribute to. The addition of the word contribute implies that this project alone is not expected to achieved the development objective. Other projects immediate objectives are expected to also contribute.

Immediate Objective (Purpose): The effect which is expected to be achieved as the result of the project delivering the planned outputs. There is a tendency for this to be expressed in terms of the change in behavior’ of a group, or institution and the project outputs are expected to facilitate this change.

Outputs: These are the ‘deliverables the tangible results that the project management team should be able to guarantee delivering. The objective statements should specify the group or organization that will benefit. Outputs are delivered, usually on certain date or dates.

Activities: These are the activities that have to be undertaken by the project to produce the outputs. The activities take time to perform.

Inputs: These are the resources that the project “consumes” in the course of undertaking the activities. Typically they will be human resources, money, materials, equipment, and time.

Advantages of the Logical Framework

- It brings together in one place a statement of all the key components of a project (this is particularly helpful when there is a change of staff)
- It presents them in a systematic, concise and coherent way, thus clarifying and exposing the logic of how the project is expected to work
- It separates out the various levels in the hierarchy of objectives, helping to ensure that inputs and outputs are not confused with each other or with objectives and that wider ranging objectives are not overlooked
- It clarifies the relationships which underlie judgments about likely efficiency and effectiveness of projects
- It identifies the main factors related to the success of the project
- It provides a basis for monitoring and evaluation by identifying indicators of success, and means of quantification or assessment
- It encourages a multidisciplinary approach to project preparation and supervision.

MODULE 7: Project Implementation and Scheduling

Once the project has been identified, prepared and appraised the next important stage is implementation. Implementation is usually done by the organization or ministry that formulated the project and received funding for it. Such an organization is called an implementing agency. The term implementation refers to the whole process of translating of broad policy goals or objectives into visible results. It is a process of organizing project activities and coordination of the execution of these activities. Similarly, implementation can be understood as process of convening resource [material, financial and human resources into goods and services., It should be noted that implementation of any project will largely depend on its size and type. For instance, a small project covering a small area and manned by say 2 people will normally take off easily without extensive documentation as compared to large ones. Such projects may include poultry, brick-smoking projects, etc which are normally run by a small group of people. On the other hand, projects which are large and probably national in character require multi-sectoral participation when implementing them. This will require extensive documentation to clearly define roles and responsibilities so that there is no waste, duplication of services or conflict between different sectors.

Requirements for implementation

Projects tend to become uneconomical, resources are not available to support other projects, and economic development is adversely affected. What can be done to minimize time to and cost over-runs and thereby improve the prospects of successful completion of projects?

1. **Adequate formulation**, through thorough field investigation, assessment of inputs use of correct cost and benefits estimation methods ,proper assessment of project linkages and the need for adequate experience and expertise.

2, **Sound Project Organizations**, Sound organization for implementing the project is critical ton its

success. The characteristics of such an organization are: led by a competent leader who is accountable to project performance. Adequate attention is paid to human side of the project -Systems and methods are clearly defined -Rewards and penalties to individuals are related to performance.

3. Proper Implementation Planning, It is necessary to do detailed implementation planning before commencing the actual implementation. Such planning should seek to: develop comprehensive time plan for various activities e.g. land acquisition, tender, Evaluation , recruitment of personnel construction of buildings, erection of plant, arrangement for utilities, trial production run, etc. Estimate meticulously the resource requirements [manpower, materials, money, etc] Define clearly the inter linkages between the various oc5viEes of the project Specify cost standards

4. Advance Action, when the project appears to be viable and desirable, advance action on the following activities may be initiated: -Acquisition of land -Securing the essential clearances - identifying the technical collaborators/consultants -Arranging for infrastructure facilities - preliminary design and engineering -Calling of tenders

5. Time availability of Funds - once a project is approves, adequate funds must be made available to meet its requirements as per the plan of implementation-it would be highly desirable if funds are provided even before the final approval to initiate advance action.

6. Judicious Equipment tendering and Procurement- How much should we rely' on foreign suppliers and how much should we depend on indigenous suppliers. Over-dependence on foreign suppliers may mean considerable outflow of foreign exchange and inadequate incentive for the development of indigenous technology and capacity while over reliance on indigenous suppliers may mean delays and higher uncertainty about Technical performance of the project. A judicious balance therefore must be sought which moderates the two. In any case, the number contract packages should be kept to minimum in order to ensure effective coordination.

7. Better Contract Management, since a substantial portion of the project is typically executing contracts, the proper management of contracts is critical to the successful implementation of the project. The following can be done in this context: -The competence and capability of all the contractors must be ensured- Proper discipline must be inculcated among contractors end suppliers by insisting that they should develop realistic and detailed resource and time plans which are congruent with project plan penalties must be imposed for failure to meet contractual obligations and incentives given to good performance

8. Effective Monitoring, In order to keep a lab on the progress of the project, a system of monitoring must be established. This helps in • Anticipating deviations from the implementation plan • Analyzing emerging problems • Take corrective action

Causes of ineffective project implementation

1. Factors related to the content of the project plan

- -Many project plans arte more or less “doubled to failure from the start because of their content and mode of presentation stemming from imperfect formulation of a problem through the use of inappropriate models, making wrong assumptions or wrong criteria.

- -Project plans are frequently too vague and provide little guidance for implementers
- -Project plans are also influenced by conflicts between politicians and outside funding agencies. The need to strike a compromise design always produces projects which are difficult to implement
- -Projects sometime fail if they are designed to meet the objectives of funding agencies than those of the local people/ intended beneficiaries.
- -Projects implementation may also fail because of delays and cost overruns if they are deliberately under
- -Costed. This is normally done to make them appear more attractive propositions as the cost benefit ratio appear more favorable.
- -In many projects it is very difficult to monitor and evaluate development projects because project designers do not collect baseline data

NB: Development projects need to be realistic in terms of laying out attainable targets, capacity and resources available to implement the activities

Also the needs and attitudes of the intended beneficiaries need to be pro determined.

2. Factors Related to the Method of Implementation

The main problems related to the method of project implementation include: Viewing planning and implementation as two separate and unrelated activities

- Lack of logical flow of stages from project identification, appraisal to courses of action and actual activities
- Failure to monitor and evaluate implementation performance and feedback information thus gained into the decision making process.
- Lack of popular participation- most project leaders take implementation to be a one mans show.
- Lack of coherency in case of partial implementation process Excessive delays in implementation
- Administrative factors i.e. incompetence of the implementation staff
- Lack of management information system.

MODULE 8: Problem Analysis and Needs Assessment

Problem arises from a need; where there is unmet need we get a problem. The main focus of the project is to solve such a need through a problem solving. A problem refers to a situation hardship and its something difficult to understand and deal with. It there fore calls for scientific and logical use of empirical data in order to understood. Developmental projects there fore are usually proposed on the basis of carefully analysis of problems. They are proposed as a response to addressing and over coming developmental problems.

Problem analysis involves; identifying what the main problems are and establishing the cause effect relation ship between these problems. The key purpose of analysis is to try and ensure the root causes are identified and subsequently addressed in the project design. A sound foundation on which to develop a set of relevant and forecast project objectives are of the main tools used in problem analysis is a *problem tree*.(PROBLEM TREE ANALYSIS)

Problem Tree Analysis

This is a replica of a holistic model approach that brings together all possible factors that cause an effect. There are two main approaches that can be used to focus to the problem

1. **Focal problem method;** where developmental problems or constraints are brainstormed by a group and this group identifies a core problem and undertakes effect analysis which pivots around the focal problems.

2. **Objective oriented methods:** this is where a broad high level development objective is specified at the beginning of the analysis and constraints achieving these objectives are brainstormed analyzed and sorted out into cause effect logic.

Both approaches are valid but which one is largely used depends on the individual's preference and circumstances pertaining at the time or any given time. Problem analysis should be undertaken as a group learning activity involving all stakeholders and mainly the beneficiaries of the target group. This target group can contribute relevant technical and local knowledge. A workshop environment is usually appropriate form for developing a problem tree analyzing the results and proposing solution. It may be appropriate to undertake problem analysis exercises with different stakeholders to help determine different perspectives and how priorities vary.

Preparation Steps

1) Clarify the scope of the investigation or analysis .If you are participating in the project, preparatory mission, others will have already identified at least some extent the main development problems they are concerned with or the opportunities they have seen. Understanding this will help us forecast the direction of the analysis that we will want or we be able to deal with in order to avoid range of problems and this information should help us identify either an appropriate objective of focal problem.

Steps Involved In Problem Analysis

1. Comprehend the case situation
2. Define the problem
3. Identify the causes
4. Generate alternative solutions
5. Make decisions
6. Take actions

Classification of Needs

Felt needs: these are needs directly or indirectly verbalized by the communities concerned .this is usually over longer period of time.

Expressed need: are those manifested by the communities by search for help in solving a particular problem e.g. hunger strike, in the community in search for food.

Assume need: these are needs usually arrived at by using of conventional ideas and are determined from real life situations. they are more or less imposed needs. They look those prescribed during colonial times and the time the governments were centralized and treat all situations as homogenous

Assessed need: are requirement assessed by people with professional training. These professional usually give qualified opinion e.g. physicians in diagnosis

Problem analysis / needs assessment: refer to care full studies of community requirements. Theses mark the beginning of any project/ program development

MODULE 9: Project Monitoring and Evaluation

Monitoring generally refers to the process of regularly checking on the status of the program by comparing the actual implementation of activities against a work plan, including whether the activities are being completed as planned, whether they are being conducted with in the time frame specified, whether the budget is being spent according to plan, whether any changes are needed in the management or implementation of the activities, and whether the work plan should be modified.

Evaluation on the other hand is directed at measuring progress toward the achievement of program objectives and the impact of the program (whether the intended long term changes have occurred).This includes measuring the extent to which the changes that have occurred are attributable to your programs activities. Although there are differences between monitoring and evaluation, the two processes work together to lead to the same end, which is to produce information that can be used to improve the management of a program and achieve the intended short term objectives and long-term results.

Monitoring of a program or intervention involves the collection of routine data that measure progress toward achieving program objectives. It is used to track changes in program performance over time. Its purpose is to permit stakeholders to make informed decisions regarding the effectiveness of programs and the efficient use of resources. Monitoring is sometimes referred to as process evaluation because it focuses on the implementation process and asks key questions:

- How well has the program been implemented?
- How much does implementation vary from site to site?
- Did the program benefit the intended people? At what cost?

Examples of program elements that can be monitored:

- Supply inventories
- Number of vaccine doses administered monthly
- Quality of service
- Service coverage

- Patient outcomes (changes in behavior, morbidity, etc)

The purpose of evaluation is that Evaluation helps program managers identify what is and is not working as well as how to make the projects work better. It also provides a means of demonstrating project staff and donor agencies, the extent to which the project is achieving its objectives. It provides many benefits to social programs. It permits us to;

- identify successful strategies
- modify or discontinue interventions that do not yield desired results
- share findings with programs in other countries or regions
- provide donors/ funders with evidence of the result of their investment
- demonstrate the organization's interest in accountability

Evaluation can answer three basic questions,

- How well has the project been implemented?
- Has the desired change been achieved?
- If the change has been achieved, to what extent can the change be attributed to the projects?

Depending upon which question we want to answer, we choose one of the three evaluation types.

Why Is M&E Important?

Monitoring and evaluation helps program implementers to make informed decisions regarding program operations and service delivery based on objective evidence. Ensure the most effective and efficient use of resources objectively assess the extent to which the program is having or has had the desired impact, in what areas it is effective, and where corrections need to be considered. Meet organizational reporting and other requirements, and convince donors that their investments have been worthwhile or that alternative approaches should be considered.

Examples of questions that M&E can answer:

- Was the program implemented as planned?
- Did the target population benefit from the program and at what cost?
- Can improved health outcomes be attributed to program efforts?
- Which program activities were more effective and which less effective?

When Should M&E Take Place?

M&E is a continuous process that occurs throughout the life of a program. To be most effective, M&E should be planned at the design stage of a program, with the time, money, and personnel that will be required calculated and allocated in advance. Monitoring should be conducted at every stage of the program, with data collected, analyzed, and used on a continuous basis. Evaluations are usually conducted at the end of programs. However, they should be planned for at the start because they rely on data collected throughout the program, with baseline data being especially important. One rule of thumb is that 5-10% of a project budget should be allocated for M&E.

Important of the M&E Plans

M&E plans are very important because they state how a program will measure its achievements and therefore provide accountability by documenting consensus and providing transparency to guide the implementation of M&E activities in a standardized and coordinated way of preserving the institutional memory.

M&E Plan Components:

Typically, the components of an M&E plan include:

- The introduction
- The program description and framework
- A detailed description of the plan indicators
- The data collection plan
- A plan for monitoring
- A plan for evaluation
- A plan for the utilization of the information gained
- A mechanism for updating the plan

MODULE 10: Cost Structure and Budgeting

Characteristics of a good budget

- A budget is primarily a planning and control device
- A budget is prepared in monetary terms and or quantitative terms
- A budget is prepared for a definite future period
- It shows planned income and expenditure and also the capital to be employed
- Purpose of the budget is to implement the policies formulated by arrangement for attaining the given objectives

Objectives of Budgeting

Planning: a budget provides a detailed plan of action for business/organization over a definite period of time. By planning many problems are anticipated long before they arise and solutions can be sought through careful study.

Communication: A budget is a communication device. The approved budget copies are distributed to all management personnel, which provides not only adequate understanding and knowledge of programmes and policies to be followed but also gives knowledge about the restrictions to be adhered to. It is not the budget itself that facilitates communication, but the vital information is communicated in the act preparing budgets and participation of all responsible individuals in this act.

Motivation: A budget is a useful device for motivating managers to perform in line with company

objectives. If individuals have actively participated in the preparations of budgets, it acts as a strong motivation force to achieve the target.

Control: Control as applied to budgeting is a systematized effort to keep management informed of whether planned performance is being achieved or not. For this purpose a comparison is made between plans and actual performance. The difference is reported to management for corrective action.

Performance evaluation: A budget provides a useful means of informing managers how well they are performing in meeting targets; they have previously helped to set. This helps in rewarding employees on the basis of achieving the budget target or promotion of managers may be linked their budget achievements.

Advantages of Budgeting

- a) Budgeting compels managers to think ahead to anticipate and prepared for changing conditions
- b) Budgeting co-ordinates the activities of various departments and functions of the organization
- c) It increases production efficiency, eliminates waste and controls the costs
- d) It pin points efficiency or lack of it.
- e) Budgetary control aims at maximization of profit through careful planning and control
- f) It provides a yard stick against which actual results can be compared
- g) It shows management where action is needed to remedy a situation.
- h) It ensures that working capital is available for the efficient operation of the organization or business.
- i) It directs capital expenditure in the most profitable direction
- j) It instills into all levels of management a timely careful and adequate consideration of all factors before reaching important decisions
- k) A budget motivates executives to attain the given goals
- l) Budgetary control system assist in the delegation of authority and assignment of responsibility
- m) Budgeting creates cost consciousness and introduces an attitude of mind in which waste and efficiency cannot thrive.

Limitation of Budgeting

The list of advantages given above is impressive, but a budget is not a cure all for the organization ills. Budgeting suffers from certain limitations and those using the system should be fully aware of them.

(i) The Budget plan is based on estimates. Budgets are based on forecasts and forecasting cannot be an exact science. Absolute accuracy therefore, is not possible in forecasting and budgeting.

(ii) Danger of rigidity: A budget programme must be dynamic and continuously useful if they acquire rigidity in the changing environment.

(iii) Budgeting is only a tool of management. Budgeting cannot take place of management but is only a tool of management. The budget should be regarded not as a master, but as a servant.” Sometimes it is believed that introduction of a budget programme is alone sufficient to ensure its success. Execution of a budget will not occur automatically. It is necessary that the entire organization must participate enthusiastically in the program for the realization of budgeted goals.

Essentials of Effective Budgeting

A budgetary control system can prove successful only when certain conditions and attitudes exist, absence of which will negate to a large extent the value of the budget.

The conditions are:

1. Support of top management if the budget system is to be successful it must be fully supported by every member of management and direction must come from the top management
2. Participation by responsible executives, Those entrusted with the performance of the budgets should participate in the process of setting the budget figures. This will ensure proper implementation of budget programmes.
3. Reasonable goals: The budget figures should be realistic and represent reasonably attainable goals.
4. Clearly defined organization. In order to derive maximum benefits from the budgetary system, well defined responsibility centers should be built up within the organization. The controllable costs for each responsibility center should be separately shown.
5. Continuous budget education. The best way to ensure the active interest of the responsible supervisors is continuous budget education in respect of objectives, potentials and techniques of budgeting this is through meetings, manuals etc.
6. Adequate accounting system, There is close relationship between budgeting and accounting. For the preparation of budgets one has to depend on accounting department for reliable historical data which forms a basis for many estimates.
7. Constant vigilance, Reports comparing budgets and actual results should be promptly prepared and special attention focused on significant exceptions-figures that are significantly different from those expected.
8. Maximum profits
9. Cost of the system. The budget system should not cost more than its worth. Since it's not practicable to calculate exactly what a caution against adding expensive refinements unless their value clearly justifies them

Preliminaries in the Installation of Budget System

Pre-requisites for the successful implementation of a budgetary control system are as follows:

(a) Creation of budget centers: A budget center is a section for the organization of an undertaking. A budget center may be a department or apart thereafter. Budget center must be clearly defined because a separate budget has to be set for each such a center with the help of the head of department concerned.

(b) Information of adequate accounting records: The account system should be so designed as to be able to record and analyze the information required. The budget procedure must also emphasize the same classification of revenues and expenses as the accounting department. Comparisons can be made if the classifications do not coincide. A chart of accounts corresponding with the budget centers should be maintained.

(c) Preparation of an organization chart: Proper organization is essential for a successful budget system. An organization chart should be prepared which clearly shows the plan of the organization. Each member of management should know the exact scope of his authority and responsibility and his relationship to other members

(d) Establishment of budget committee: In large organizations, the direction and execution of the budget is delegated to budget committee which reports directly to the top management. The financial controller is usually appointed to serve as the budget director. The heads of department

forms the finance committee

Functions of a Budget committee

- To provide historical data to all departments regarding requirements, dates of submission of estimates etc.
 - To define the general policies of the management in relation to the budget system
 - To receive budget estimates from various departments for consideration and review
 - To discuss difficulties with departmental heads and suggest possible revisions
 - To evaluate and revise the estimates before preparing the final budget. To make recommendations or budget matters where there is conflict between departments
 - To prepare a master budget after functional budgets have been approved
 - To inform departmental heads of any revisions made in their budgets by the committee.
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- To co-ordinate all budget work
 - To analyse variances and recommend corrective action where necessary

Budget Terms and Concepts

(a) Budget Manual

A budget manual is a form of a source document which contains information that helps one to prepare a budget. It contains the following among other things.

- Procedures are forms for preparing a budget
- Who is responsible for preparing a budget?
- When a budget should be prepared
- The length of a budget period (normally a year)

(b) Budget Period, control period and Budget Centre

(i) Budget period: A budget period refers to the time interval for which budget estimates are made. Normally budgets are prepared for a year but this does not mean that shorter or longer time intervals are not used. For example, the National Development Plans normally have a planning period of 5 years and have budget estimates to that effect which are supported by shorter budget estimates yearly budgets)

(ii) Control Period: A budget centre is any division of an enterprise/ organization for which a budget is required for example budgets are normally prepared for departments such as finance, production, marketing, personnel etc. these departments can be considered as budget centers.

(c) A Master Budget: A master budget is a budget which summaries other related budgets. A master budget does not give all the details of the source budgets. For example it could just only the cash balances of the control periods for say marketing, finance and personnel departments and not all the expenses and vote allocations.

(d) Operational Budget: An operation budget is one which shows periodic (daily or monthly or quarterly) operations estimates in terms of input (material) cost of input and quantity of output. As

such it has three sub-budgets

- (i) Production unit budgets (showing the estimates of sales in units)
- (ii) Materials usage budget
- (iii) Material purchases budget (showing the cost of input)

(e) Cash Budget: A cash budget is an estimate of cash flows (cash receipts) and cash out flows (cash expenses) for a given period. It is only concerned with cash movements due to activities undertaken. For each control period you get cash deficit or surplus which is a closing balance for one period and an opening balance for the following period.

(f) Interrelated Budgets and linking Budgets: Interrelated budgets are those budgets which have cause effect relationship. For example - sale budget and a production budget have cause effect relationship. An increase in one budget leads to an increase in the other budget.

Budgeting Techniques for operations:

(a) Zero-based Budgeting (ZBB): This looks at the Organization's activities and priorities a fresh. The previous year's resource allocation are not automatically considered the basis of this year's resource allocations, instead, each manager tries to justify his/her entire budget requests. Zero base budgeting involves allocating an organization's funds on the basis of a cost benefit analysis of each organization's major activities.

(b) Incremental Budgeting: This is the type of budgeting where the additions and subtractions on the previous budget is done. Therefore the current budget is usually based on the previous budget.

(c) Program Planning and Budgeting Systems (PPBS): Non-profit seeking organizations such as local and central government hospitals, charities often prepare detailed conventional budgets showing the different categories of expenditure classification by classification. As consequence the budgeting process frequently just compares current expenditure to budgeted expenditure with little or no attempt to compare expenditure against performance achieved.

(d) Economic measure approach technique

(e) Output oriented budgeting (OOB) and result oriented management (ROM)

Types of Budgets

There are only two types of budget that is Recurrent Revenue and expenditure and capital *budgets*.

(a) Recurrent revenue and Expenditure budget

This type of budget in the one that handled the day today activities in any organization and by life span they take a short time usually one financial ear or less than one financial year examples include, cash budgets, raw material budget production budget, sales and marketing budget, revenue and expenditure budget to mention but a few.

(b) Capital Budgets

These are long term budgets. They usually take more than one financial year. These are usually for investment purposes and acquisition of capital assets of the organization.

Government Budgeting and its Cycle:

Budget is an important element of financial planning control and evaluation process of public sector entities. It is a means of allocating resources to achieve the objectives of a public sector entity. It is management tool for planning and for controlling funds to make sure that the stated objectives are met. Parliament is responsible for approving the public sector budget and for authorizing the executive to incur expenditures within the overall level of expenditure.

Key Factors that Make Public Budgeting Process Effective

1. Transparency: The budget documents should provide clear link between objectives and expenditures. All the participants in the budget process should be clear about their roles and responsibilities. The budget process should be simple and well documented. The department or entity targets and resources should be allocated clearly indicated and explained.

2. Management: The management and monitoring of the budget are important and emphasis should be in results to be achieved.

3 Decentralizations: Decision making should be decentralized to line Ministries, -departments and Local Governments.

4. Co-ordination and Co-operation: This links between recurrent and development budgets and the process in the financial management system should all be clearly spelt out.

5. Flexibility: The process should allow responses to change circumstances. The responses should be built into the system so that implications of any changes are sufficiently analyzed and to fit within the overall objectives and priorities.

6. Discipline

- (i) There should be effective control over expenditures
- (ii) Any changes to the budget should be carefully analyzed and justified
- (iii) Use of supplementary estimates should be limited
- (iv) Penalties of breach of rules and regulations should be spelt out

7. Accountability and Credibility

- (i) Role parliament and the Executive in Budget process should be clear
- (ii) Top and senior managers should be involved in the process
- (iii) Budget ceiling should be determined and communicated to all stakeholders
- (iv) Budgets should be reliably close to actual outcome

8. Comprehensive: The budget process and documents need to include all revenue and expenditures including aid and donor funds.

MODULE 11: Performance measurement

Budget for both recurrent and development should be based on input-output relationship.

Budget cycle with specific reference to Uganda in Uganda, the budget cycle is as follows

a) Top Management Retreat: This budget retreat for top management of Ministry of Finance, Planning and Economic Development (MFPED) to discuss the budget outlook for the next financial

year. The retreat discusses the macroeconomic outlook, expenditure issues, new policies and budget process for the coming year.

b) Updating the medium Term expenditure framework (MTEF): After the top Management retreat, the medium term expenditure framework is updated to provide a starting point for the new budget process. The process includes extending the framework to include a new financial year and updating the first two years of the framework in light of unfolding economic conditions.

c) First budget consultative budget framework workshop: The workshop provides an opportunity for all stake holders to discuss the budgetary outlook for the next three years. The participants come from all line Ministries local Government Officials, members of Parliament, donors NGO's Private Sector and Civil society. The workshop also initiates the formulation of sector working groups which examines their key objectives and priorities within a sector.

d) Sector working group discussions: The sector working groups need regularly to discuss the key issues within the sector.

The groups look into overall strategy and objectives of the sector, past performance key policy issue for cabinet approval and the medium term budget. The groups also formulate output and outcome targets for the medium term and to relate them to their budget allocations

e) Consultations with members of parliament: This meeting aims to inform MPs of progress in the budget process, to seek their involvement in setting of priorities and to gather more information on public perceptions of the budget process.

1) Second consultative budget framework workshop: This is a second workshop which provides an opportunity for the sector working groups to present their draft reports for discussion by all stakeholders. This meeting focuses specifically on Local Government issues. Key officials of the Local governments are invited for the workshop.

g) Local Government Budget framework process: The Local Government Budget framework paper involves two sets for regional workshops, which aim at providing training to Local Government officials in the areas of planning and budgeting. They also provide an opportunity for local governments to provide feedback to central government on key issues and constraints that they face, including implementation of the guidelines for conditional grants.

h) Inter-Ministerial discussion on the sector budget framework paper: A number of consultations take place between Ministry of Finance, Planning and Economic Development and the various sectors before finalizing the budget framework paper. These consultations, who have been held at higher and lower technical levels as well as ministerial level, have aimed to present and discuss the draft budget framework papers. And sector budget framework to build a consensus on areas to be found for the next financial year and on which activities must be postponed for future years, and to build strategies for improving efficiency and effectiveness of government expenditure.

i) Consultations and finalization of the budget framework paper: The aim of the budget framework paper is to provide cabinet with a clear view of the current budgetary outlook including budgetary options for the next financial year for their consideration. Budget framework paper includes the final version of the sector working groups' reports as well as discussion on the macro-economic outlook and cross-cutting issues.

j) Preparation of the budget call circular: The budget call circular presents the medium term ceiling and guidelines to line ministries to enable them to make a detail breakdown within the ceiling.

k) Discussion of the budget framework paper with donors. After the budget framework paper had been discussed and endorsed by cabinet, it is presented to and discussed with donors including NGOs. The aim for the donor funds, to discuss sector priorities in particular those funded by donors and to affirm the financial commitments from donors for both budget support and project funding.

1) Submission of indicative budget allocations to parliament: Under the budget Act, Ministry of

Finance, Planning and Economic Development is to submit a Parliament estimates of Revenue and Expenditure for the next year by the 1 April. This should include fiscal and monetary programs and plans for economic and social development over the medium term period. Comments by Parliament are then collected and submitted officially to the president by 1st May.

m) Review of parliamentary consideration and operation of cabinet memo on the Budget:

Under the Budget Act MFPEM is required to review the recommendations put forward by the Parliamentary Budget Committee and to prepare a cabinet Memo on the Budget not later than the 7th June.

n) Presentation of the Budget: Once all the consultations are complete, MPPED proceeds to prepare the appropriate documents for presentation to parliament. These documents include the background to the budget and the budget speech. The background to the budget highlights the major achievements on the previous year. Setbacks register and their causes. The budget speech gives details of the budget and the set targets over the medium term period. At the same time, MFPEM also presents the status of loans and grants to Uganda.

o) Submission of Policy Statement by the Line Ministries: By end of June, the line ministries are required to submit their ministerial policy statements for discussion by parliament.

p) MFPEM is required to report on supplementary expenditure within four months of the period of expenditure. Similarly, MFPEM is also required to provide a report to Parliament of all expenditures from Budget contingency provision, within 14 days from the date of authorization of the advances from the provision.

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