ETUI – European Trade Union Institute

ETUI Training on “Project management for Trade Union representatives”

Course book and work book – June 2017
## Table of contents

Part 1 – Course material ..................................................................................................................5
  Introduction ..................................................................................................................................5
Preparatory Work ..............................................................................................................................10
  Activity sheet 1 – Preparatory work ............................................................................................10
Paired introductions .........................................................................................................................13
  Activity sheet 2 – Participants’ presentations ............................................................................14
Group Projects ...............................................................................................................................17
  Activity sheet 3 – Group projects ...............................................................................................17
Guidance note - Aims and objectives ...............................................................................................21
  Activity sheet 4 – Developing aims and objectives ....................................................................27
Guidance note - Work Breakdown Structure ..................................................................................29
  Activity sheet 5 – Create a Work Breakdown Structure ............................................................31
Guidance note - Scheduling your project .......................................................................................32
  Activity sheet 6 – Schedule your project ...................................................................................33
Assigning resources to tasks ...........................................................................................................34
  Activity sheet 7 – Assign resources to tasks .............................................................................34
Guidance note - Producing a risk assessment plan .......................................................................35
  Activity sheet 8 – Produce a risk assessment plan ....................................................................38
Guidance note - Producing an evaluation plan ...............................................................................39
  Activity sheet 9 – Produce an evaluation plan ...........................................................................41
Guidance note - Budget and finances ............................................................................................42
  Activity sheet 10 – Create the budget .......................................................................................43
Guidance note - Producing a dissemination plan ..........................................................................45
Guidance note - Design a management and coordination structure ..............................................47
  Activity sheet 11 – Design a management and coordination structure ....................................49
Course evaluation ...........................................................................................................................51
  Activity sheet 12 – Evaluate the training ....................................................................................51
Part 2 – Workbook ..........................................................................................................................55
Part 3 - Annexes ...............................................................................................................................66
  List of annexes ............................................................................................................................66
Smartsheet Pack .............................................................................................................................67
Excel notes ........................................................................................................................................76
In this pack, you will find:

**Course Materials** – these are the course activities, supporting materials and essential course resources

**Course Workbook** – to enable you to further develop your original project idea and provide evidence to enable you to be awarded a certificate for your work on this course.

**Annexes**, including:

- **Smartsheet Pack** – The teaching team will introduce you to a software tool ‘Smartsheet’ which is an invaluable aid to help you manage a project. The instructions for using Smartsheet and how to log on to Smartsheet can be found in this pack.

- **Excel Instructions** – You will be using excel as part of managing project finances and budgets. In this section, you will find useful instruction on the use of Microsoft Excel.
PART 1 – COURSE MATERIAL

INTRODUCTION

Welcome to the European Trade Union Institute’s intermediate course on Project management for Trade Union Representatives.

Getting involved in projects, both national and European, can offer great benefits to unions in Europe – not just financial ones, although in times of economic restraint project funding can make an important contribution to allowing unions to address important strategic objective. The acquisition of project management skills can also lead to more effective and efficient achievement of trade union work more generally – and in planning, communication, teamwork and task delivery.

A new initiative for training in project work and project management

The European Trade Union Institute (ETUI), together with the European Trade Union Confederation and a core group of affiliates, tutors and experts, has been working to produce a certified three-level training programme designed to address trade union project work needs at regional, national and European levels.

Training modules on different aspects of project work and project management are now being offered at Introductory, Intermediate and Advanced levels, with pathways for progression between these levels. Formal recognition and accreditation for this training, mapped via the European Qualifications Framework, has already been achieved with the support of the British TUC.

Three levels of training

Developing effective skills in project work and project management can contribute to union capacity-building at a variety of different levels:

- the Introductory level course, *Project work for Trade Union Representatives*, is designed to provide a basic foundation in project work. The introductory course is delivered by national or sectorial organisations. It is designed for union staff who might be involved in organizing campaigns or events, recruitment drives, publications, etc. The course will be beneficial, too, for clerical, administrative and finance staff who are tasked with supporting colleagues or reporting on union projects;
✓ the Intermediate level course, **Project management for Trade Union Representatives**, provides more detailed training in all aspects of project work. The course will provide a valuable experience for people who are members of European project teams, as well as those who may be responsible for national or regional union projects. Successful completion of the Introductory level course will normally be a pre-requisite for acceptance on this course. The Intermediate level course will be delivered at European level by ETUI Education, with participants drawn from different European countries and trade unions;

✓ in addition to the Introductory and Intermediate level courses, ETUI Education is designing a suite of **Advanced modules** for union officers who have responsibility for designing, leading and managing projects of scale at national and European levels. The Advanced modules, too, will bring together participants from across the European Union.

**Learning on ETUI courses**

ETUI Education uses an approach to learning that actively involves individuals working together. There are several important reasons for this. Many trade union representatives may not have participated in formal education and training for several years. They may have experienced being “talked at” or “lectured at” and as a result may not have enjoyed elements of their previous education or training.

Secondly, skills development and the application of skills is a vital component of ETUI Education. This is because participants who come on ETUI courses need to be able to do certain things well, both in workplace and in the union. One of the most effective ways of acquiring skills is through experience – learning by doing. Trade union tutors create opportunities for learners to practice the skills they need through activity in the classroom.

Thirdly, union learning or training usually means working with other people, because collective activity is central to the union representative’s or officer’s job. By working in pairs, groups and in plenary sessions, participants work on issues and problems and learn to listen, debate, co-operate, plan and organize with their colleagues.

Most importantly, participants on ETUI courses are a huge resource in themselves, coming from a wide range of background and experience, often with highly developed skills. While participants will have things to learn from the course, they also have valuable things to contribute, too.
Portfolio building and accreditation

Accreditation – the award of an educational “credit” or qualification – is something that ETUI is actively experimenting with. Currently a number of pilot courses are being accredited with the support of the British TUC. ETUI is evaluating these trials to inform its strategy and future action on accreditation generally.

Each of ETUI’s accredited courses is based on specific “learning outcomes” – statements which make clear what the course will enable the participants to do – and “assessment criteria” explaining what the learner has to do to demonstrate that the learning outcomes have been met. You will find the learning outcomes and the assessment criteria for this course in the next section of this introduction. Most Activity Sheets also indicate the learning outcomes and assessment criteria that the activity relates to.

This probably sound quite formal and a little daunting, but in fact the process is very straightforward. There are no formal examinations on the course. Participants generate all the evidence to show that they have achieved the learning outcomes as part of the course itself.

A crucial element in accreditation is portfolio building. By a portfolio, we simply mean a folder that holds each course participant’s work. This provides a record of each participant’s response to an activity or task. These records can then be assessed against the learning outcomes of the course and if the outcomes are met, educational recognition (sometimes a qualification) can be given.

Learning outcomes and assessment criteria

This course has 6 learning outcomes that should be achieved by the end of the course:
<table>
<thead>
<tr>
<th>Learning outcomes</th>
<th>Assessment criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The learner will:</strong></td>
<td><strong>The learner can:</strong></td>
</tr>
</tbody>
</table>
| 1. Be able to draft a project outline relevant to a union organisation or workplace setting | 1.1 Articulate appropriate aims, objectives and performance criteria for a specific trade union project  
1.2 Identify how a trade union project will contribute to achieving goals and/or priorities of the union organisation or workplace  
1.3 Identify suitable funding opportunities for a trade union projects  
1.4 Draft a project outline relevant to a union organisation or workplace setting |
| 2. Be able to prepare a detailed schedule and budget for a trade union project | 2.1 Produce an appropriate detailed schedule for a trade union project  
2.2 Produce a detailed budget for one element of a trade union project |
| 3. Be able to apply tools and techniques for the effective management of a project | 3.1 Design an appropriate management structure for a specific trade union project  
3.2 Identify a team and allocate roles for a specific trade union project  
3.3 Identify ways of establishing and managing relationships with key stakeholders  
3.4 Identify appropriate processes for monitoring progress, managing change and reporting for trade union projects |
| 4. Be able to identify potential problems or solutions | 4.1 Identify potential problems and/or issues with a trade union project  
4.2 Identify solutions and potential contingency plans to solve problems and issues |
| 5. Know how to evaluate a trade union project | 5.1 Identify appropriate methodologies for the evaluation of a trade union project  
5.2 Prepare an evaluation plan using an established method to evaluate one aspect of a trade union project |
| 6. Be able to devise appropriate strategies for dissemination of a trade union project | 6.1 Identify appropriate methods for disseminating information about the progress of a trade union project  
6.2 Identify opportunities for disseminating the results of a trade union project |
PREPARATORY WORK

Note: this activity needs to be done prior to attending the course.

ACTIVITY SHEET 1 – PREPARATORY WORK

Aims

✓ revise the ETUI Introductory Level course materials and your course notes
✓ start to think about the ETUI Intermediate Level course materials and topics
✓ draft a project outline relevant to your trade union or workplace setting

Task 1

Using your knowledge from the ETUI Introductory level course and/or your project work experience, consider various elements relating to project work.

For the latest version of the ETUI course materials - Project work for Trade Union Representatives - Course book - Edition 2017 (EN) - please go to the ETUI website:

http://www.etui.org/Publications2/Guides/Toolkit-Trade-Union-Training-for-Project-Work

Task 2

Spend a few moments discussing with your trade union colleagues in your organisation a project idea that you would like to suggest as part of your participation on the ETUI Intermediate level course.

Using the structure presented below, produce an outline plan for your project idea.

Please return (by email) your completed pre-course activity to ETUI Education officer, Valerica Dumitrescu – vdumitrescu@etui.org - not later than Monday 06.06.2017

By successfully completing and returning this pre-course activity, you will have started to achieve the accreditation criteria which will lead to the qualification associated with the ETUI Intermediate Level course.
<table>
<thead>
<tr>
<th>Worksheet – Preparatory work</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name and organisation</strong></td>
</tr>
<tr>
<td><strong>Title of the project</strong></td>
</tr>
<tr>
<td><strong>Briefly describe the theme of your trade union project (not more than 100 words)</strong></td>
</tr>
<tr>
<td><strong>Describe how your project idea will contribute to achieving your union’s organisational or strategic goals (not more than 250 words)</strong></td>
</tr>
<tr>
<td><strong>List the main aim(s) and objectives</strong></td>
</tr>
<tr>
<td><strong>Who is your target group?</strong></td>
</tr>
<tr>
<td>Question</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Identify any potential partners for the project</td>
</tr>
<tr>
<td>What are the possible project outcomes? What will your project produce?</td>
</tr>
<tr>
<td>How long will your project run?</td>
</tr>
<tr>
<td>Suggest any funding opportunities for your project idea</td>
</tr>
<tr>
<td>How sustainable is your project idea (after the funding period)?</td>
</tr>
<tr>
<td>What are the main opportunities and challenges in delivering your trade union project?</td>
</tr>
</tbody>
</table>

Paired introductions
Activity Sheet 2 – Participants’ Presentations

Aims:
✓ begin to get to know other members of the course
✓ set out some of the aims for this course
✓ practice interviewing skills

Task 1:
Interview the person next to you and find out his/her:
✓ name
✓ union/organisation
✓ trade union and labour movement experience
✓ any experience of project work
✓ what he/she wants from the course, his/her aims
✓ any concerns he/she may have about the course

Use the worksheet opposite to make a note of their responses.

Task 2:
Briefly introduce your partner to the whole group, indicating his/her:
✓ name and union/organisation
✓ experience
✓ any wants and concerns

Resources:
✓ worksheet: Paired introductions

Time: paired activity – 10 minutes
Learning outcomes: none
<table>
<thead>
<tr>
<th><strong>Worksheet – Paired introductions</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Your partner’s name?</td>
</tr>
<tr>
<td>His/her Union/Organisation?</td>
</tr>
<tr>
<td>Trade union and labour movement experience?</td>
</tr>
<tr>
<td>Experience of project work?</td>
</tr>
<tr>
<td>What he/she wants from the course; his/her aims?</td>
</tr>
</tbody>
</table>
Any concerns he/she has about the course?

Keep a record of your own aims and/or concerns for the course
GROUP PROJECTS

ACTIVITY SHEET 3 – GROUP PROJECTS

Aims:
✓ to familiarise course participants with the theme of the project they will be working on throughout the course
✓ to give participants the chance to express initial reactions and needs of clarification

Task:
Read the document concerning the project outline and discuss the following points within your group:

1. is the information on the project outline sheet clear? Please explain
2. do you have any questions or need any clarifications on the content?

Appoint a spokesperson to report back to the plenary.

Resources: project outline provided

Time: 30 minutes

Learning outcomes: none
<table>
<thead>
<tr>
<th>Title: Developing trade union action on health safety</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Context:</strong></td>
</tr>
<tr>
<td>Occupational Safety and Health policy is not only a matter of laws and regulations - they are essential requirements that have to be applied at the workplace level. But to achieve measurable improvements of the working conditions and a reduction of occupational accidents and diseases it is necessary to combine them with a variety of other instruments, such as social dialogue, good practices, awareness raising, corporate social responsibility, economic incentives and mainstreaming.</td>
</tr>
<tr>
<td>At EU-level, this holistic approach towards OSH has been adopted in the form of Community strategies on health and safety at work.</td>
</tr>
<tr>
<td>The current Community strategy aims to achieve a 25% cut in accidents at work across the EU. To achieve this goal, it calls for action by players at all levels – European, national, local and workplaces.</td>
</tr>
<tr>
<td><strong>Specific policy area:</strong></td>
</tr>
<tr>
<td>Your Trade Union project could support the overall European context in one or more of the following areas:</td>
</tr>
<tr>
<td>✓ encourage improvement in occupational health and safety in all sectors of activity, both public and private</td>
</tr>
<tr>
<td>✓ promote workers' rights to make proposals relating to health and safety</td>
</tr>
<tr>
<td>✓ seek to adequately protect workers and ensure that they return home in good health at the end of the working day</td>
</tr>
<tr>
<td><strong>Funding:</strong> € 150,000</td>
</tr>
<tr>
<td><strong>Duration:</strong> 18 months</td>
</tr>
</tbody>
</table>
### Project outline 2

<table>
<thead>
<tr>
<th>Title:</th>
<th>Promoting women’s rights in the workplace</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context:</td>
<td>Equality between genders is one of the fundamental principles of EU law and legislation, equal rights between women and men have existed since the very early days of the European Community. Since the 1970s a total of 13 pieces of legislation have been adopted with the aim of ensuring that women and men in Europe get fair and equal treatment at work. These laws cover a range of areas including equal treatment when applying for a job, equal treatment at work, protection of pregnant workers and breastfeeding mothers, and rights to maternity leave and parental leave. Millions of women and men across Europe enjoy these rights every day – but few of them know that the European Union is behind these laws. And while the rights of women have improved greatly, the goal of equal opportunities and treatment, especially in the workplace, remains a work in progress.</td>
</tr>
<tr>
<td>Specific policy area:</td>
<td>Your Trade Union project could support the overall European context in one or more of the following areas: ✓ women in employment ✓ women’s earnings ✓ women and careers ✓ women and poverty</td>
</tr>
<tr>
<td>Funding:</td>
<td>€ 150,000</td>
</tr>
<tr>
<td>Duration:</td>
<td>18 months</td>
</tr>
<tr>
<td>Project outline 3</td>
<td></td>
</tr>
<tr>
<td>-------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Title:</strong> Young Europeans and decent work</td>
<td></td>
</tr>
<tr>
<td><strong>Context:</strong></td>
<td></td>
</tr>
<tr>
<td>As part of the Youth Employment Package presented in December 2012, the European Commission called on Member States to ensure that all young Europeans receive a good quality offer of employment, continued education, an apprenticeship or a traineeship within four months of leaving school or becoming unemployed. This is called the Youth Guarantee.</td>
<td></td>
</tr>
<tr>
<td>The Commission's proposal was adopted by the Council in April 2013. The priority now is implementation. This is reflected in the Commission's Country-Specific Recommendations for 2013. The Commission has identified urgent steps needed to combat youth unemployment through inter alia active labour market policies, reinforcement of public employment services and support for training and apprenticeship schemes. These steps will all contribute to the delivery of the Youth Guarantee.</td>
<td></td>
</tr>
<tr>
<td><strong>Specific policy area:</strong></td>
<td></td>
</tr>
<tr>
<td>Your Trade Union project could support the overall European context in one or more of the following areas</td>
<td></td>
</tr>
<tr>
<td>✓ the implementation of the Youth Guarantee</td>
<td></td>
</tr>
<tr>
<td>✓ support for intra-EU labour mobility</td>
<td></td>
</tr>
<tr>
<td>✓ steps to ease the transition from education to work by boosting the supply of high-quality apprenticeships and traineeships and addressing skills shortages; and/or</td>
<td></td>
</tr>
<tr>
<td>✓ measures to support job creation in the immediate term, especially by SMEs, and to incentivise the hiring of young people.</td>
<td></td>
</tr>
<tr>
<td><strong>Funding:</strong> € 150,000</td>
<td></td>
</tr>
<tr>
<td><strong>Duration:</strong> 18 months</td>
<td></td>
</tr>
</tbody>
</table>
GUIDANCE NOTE - AIMS AND OBJECTIVES

When starting out on your project, you will want to define your project’s aims and objectives.

In everyday use, aims and objectives can often have the same meaning and both words are sometimes used interchangeably. However, in project management terms, these words have very precise and specific meanings.

An aim is what you want to achieve.

Aims:

- are broad statements of desired outcomes, or the general intentions of the project which ‘paint or convey’ a picture of your project;
- emphasize what is to be achieved;
- address the long term project outcomes, i.e. the aim(s) should reflect the aspirations and expectations of the project topic.

Once you have established your project aims, the next task is to develop the project objectives.

An objective is a planned programme of activity that you need to carryout in achieve your aim.

Objectives:

Are secondary to aims and can be:

- a specific list of key tasks needed to accomplish the goals of the project;
- emphasize how aims are to be accomplished;
- must be high focused and feasible;
- address the most immediate project outcomes;
- should be sensible, precisely described and link to the project aim(s).

Often projects will have several objectives and each objective may produce a specific output or product. No matter how many objectives you have, all objectives should contribute to the overall aim of the project.

Objectives can be changed during the lifetime of a project. For example, if an activity is not contributing to the overall aim of a project, it may be necessary to stop or change an objective. However, aims are normally fixed. It is much harder to change the aim of a project especially if external funding is being used to finance the original idea of the project.
Aims and Objectives should not:

- be vague, unrealistically ambitious or too broad in scope;
- just repeat each other in different terms;
- just be a simple list of things related to the project;
- contradict your methods – i.e. they should not be a list of outputs that cannot be achieved using your project methodology.

Methodology

At this stage it is useful to provide a short description or narrative that sets out how you plan to undertake your project. Even at this early stage of project planning, a brief methodology will help you think about the individual elements that you will need to plan and schedule for your project to be successful.

Partners

At this initial stage, it is useful to consider who will be your key project partners. You will need to bring your partners together to get your project started and to enable them to work collectively to bring success to your project. Project partners may change over the lifetime of the project.

Setting aims and objectives

“If you don’t know where you’re going, you might end up somewhere else”

(Casey Stengel, New York Yankees)

In ETUI, we recommend you use the **SMART principle** to help you define your aims and objectives. They should be:

- **Specific** – clearly defined
- **Measurable** – you will know when they have been achieved
- **Achievable** – within your work environment and the skills that are available
- **Realistic** – avoid trying to achieve the impossible
- **Time related** – set a completion or delivery date, perhaps based to organization need

It may not be always possible to use all the elements above at any one time when setting your project aims and objectives since you might have to set a group of objectives to deal effectively with different aspects of your project. However, applying the SMART principle around your aims and objectives will help you plan your project activity.
An example.

Below is a brief overview of a European Union funding opportunity that also relates to the strategic objectives of a trade union organisation.

Developing Trade Union participation with environmental issues in the workplace

Context

The European Union is working hard to move decisively beyond the current crisis and create the conditions for a more competitive economy with higher employment.

The Europe 2020 strategy is about delivering growth that is: smart, through more effective investments in education, research and innovation; sustainable, thanks to a decisive move towards a low-carbon economy; and inclusive, with a strong emphasis on job creation and poverty reduction. The strategy is focused on five ambitious goals in the areas of employment, innovation, education, poverty reduction and climate/energy.

Specific policy area

A trade union project could support the overall European context in one or more of the following areas:

- building a more competitive low-carbon economy that makes efficient, sustainable use of resources;
- protecting the environment, reducing emissions and preventing biodiversity loss;
- capitalising on Europe's leadership in developing new green technologies and production methods;
- harnessing EU-scale networks to give our businesses (especially small manufacturing firms) an additional competitive advantage;
- improving the business environment.

Funding

The total budget is €150000

Duration

18 months
Developing Trade Union Participation on Environmental Issues in the Workplace

Using the previous overview, the project team decided to have **three** project aims and several project objectives; each objective directly linked to the overall project aims.

<table>
<thead>
<tr>
<th>Working Title: Improving Environmental Performance in the Workplace</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Aims, to:</strong></td>
</tr>
<tr>
<td>• improve environmental performance in the workplace;</td>
</tr>
<tr>
<td>• help build a more competitive low carbon economy;</td>
</tr>
<tr>
<td>• help make efficient, sustainable use of resources to improve the business environment.</td>
</tr>
<tr>
<td><strong>Objectives:</strong></td>
</tr>
<tr>
<td>• develop a “train the trainer’s” course to deliver workplace training;</td>
</tr>
<tr>
<td>• develop workplace training packages and materials on specific environmental themes;</td>
</tr>
<tr>
<td>• train a cohort of environmental trainers;</td>
</tr>
<tr>
<td>• evaluate the effectiveness of workplace training, training packages and materials;</td>
</tr>
<tr>
<td>• develop an action plan for future work.</td>
</tr>
</tbody>
</table>

You will see from the above objectives; the project team has decided to develop a train the trainer’s course and produce a set of training packages to be used in the workplace. A team of trade union trainers will be recruited and trained to use the training packages in the workplace. Once the workplace training has been delivered, the training will be evaluated and an action plan developed for further sustainable activity on this theme.

Using the project overview, the trade union organisation could have developed other project activities that could contribute to environment improvements in the workplace. These could have been: staging an environmental event; developing a single environmental awareness course; providing merchandise to reinforce ideas and thinking leading to environment improvements.

However, after considering several alternatives, it was decided that training trade union trainers to help train the workforce (union and non-union employees) would be more productive. In addition, trade unions are uniquely placed in the workplace
to make a substantial impact on developing environmental improvements in the workplace.

**Methodology:**

- identify potential partners;
- identify potential environmental themes;
- develop the project team including key stakeholders;
- write “train the trainers” course materials and specific workplace training packages and materials;
- deliver the “train the trainers” course to enable the environmental trainers to deliver workplace training using produced materials;
- schedule the workplace training for the environmental trainers to deliver their training;
- evaluate the effectiveness of the training;
- develop an action plan leading to future sustainable workplace improvements on environment themes;

The above methodology provides the essential steps that are required to develop the project’s objectives and meet the projects aims.

**Possible Partners:**

- Trade unions;
- Employers;
- Trade union educators;
- Subject specialists.
ACTIVITY SHEET 4 – DEVELOPING AIMS AND OBJECTIVES

Aims:

✓ review and discuss project aims and objectives
✓ to develop and write aims and objectives for your given project
✓ produce detailed aims and objectives for further course work
✓ start to think about your project methodology
✓ start to think about your possible project partners

Task 1:

Drawing on the previous presentations and for your given project, provide:

✓ a working title for your project
✓ the main aims of the your project
✓ the specific project objectives
✓ a brief overview that describes the methodology you will use to undertake your project
✓ a list of possible project partners

Please use the blank “Project aims and objectives” pro forma to enter the above information. You will be invited to present the above five points in a plenary session with other course participants. Please appoint a spokesperson to present on behalf of your group during the plenary.

Time: 55 minutes

Task 2:

Following the plenary session, review, revise and amend (if necessary) your project aims and objectives. Write this up and put the final word document into your course portfolio, you will need this for further activities during the course.

Time: 20 minutes

Resources:

✓ project outline
✓ blank pro forma
✓ flipchart

Learning outcomes: 1

Assessment criteria: 1.1, 1.2, 1.3, 1.4
<table>
<thead>
<tr>
<th>Worksheet - Project aims and objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>What will be your working title for your project?</td>
</tr>
<tr>
<td>What are the main aims of your project?</td>
</tr>
<tr>
<td>What are the specific project objectives?</td>
</tr>
<tr>
<td>Provide a brief overview that describes the methodology you will use to undertake your project</td>
</tr>
<tr>
<td>List the possible project partners</td>
</tr>
</tbody>
</table>
Guidance Note - Work Breakdown Structure

In this part of the course, we’re going to be focusing principally on planning the time element of the project. We’ll be producing first a Work Breakdown Structure (WBS), then scheduling the various tasks using a Gantt chart and then finally allocating tasks to individual members of the team.

Most of the basic principles you will be familiar with from your Introductory course but during these sessions we will be using a computerised planning tool, Smartsheet, and we will be looking in more detail at task dependency i.e. how individual tasks relate to each.

The goal here is to break down the project into coherent and manageable segments then within each work package to list individual task and subtasks. Whilst there will be common work packages that appear in almost any project, many will also depend on the specific content of the project.

Here are a few pointers on how to approach breaking the project down into work packages:

✓ think about the logical structure of the project and how major areas of work relate to each other – sometimes preparing a flowchart can help with visualizing this;
✓ if the project objectives have been clearly set out, they may provide an appropriate framework for identifying key work packages;
✓ think about what the project will be producing, its tangible products or deliverables. This can often provide the best skeleton framework for the WBS;
✓ remember that work packages do not necessarily form a simple chronological sequence: some may run in parallel, others may last for the whole project period. Similarly, although each will constitute a key segment of the overall work of the project, they may still vary considerably in size and duration.

When you’ve finished defining these major segments of the project, next break each down into tasks and, if appropriate, into subtasks.

The WBS is a key planning and management tool and you need to judge the right amount of detail:

✓ if the task breakdown is left at too large a scale, it will be difficult to monitor progress effectively;
✓ on the other hand, breaking the work into minute detail leads to unnecessary complication and inefficient micro-management.
Alongside tasks and subtasks, it is helpful to include a few **milestones** to mark key events such as completion of a work package or a major deliverable.

As far as possible, enter tasks in a chronological sequence within each work package.

<table>
<thead>
<tr>
<th>Task 3.1</th>
<th>Prepare programme</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1.1</td>
<td>Identify objectives, target group, content, materials</td>
</tr>
<tr>
<td>3.1.2</td>
<td>Construct draft course plan</td>
</tr>
<tr>
<td>3.1.3</td>
<td>Agree final programme</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 3.2</th>
<th>Assemble team of tutors</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.2.1</td>
<td>Identify and recruit tutors</td>
</tr>
<tr>
<td>3.2.2</td>
<td>Hold team planning meeting</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 3.3</th>
<th>Arrange venue and facilities</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Task 3.4</th>
<th>Advertise and recruit participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.4.1</td>
<td>Prepare publicity material</td>
</tr>
<tr>
<td>3.4.2</td>
<td>Distribute publicity material</td>
</tr>
<tr>
<td>3.4.3</td>
<td>Process applications</td>
</tr>
<tr>
<td>3.4.4</td>
<td>Distribute detailed course information</td>
</tr>
</tbody>
</table>

| Task 3.5 | Deliver pilot course |
Activity Sheet 5 — Create a Work Breakdown Structure

Aims:
✓ to identify the key work packages and tasks necessary to complete your project
✓ to produce an outline Work Breakdown Structure for the central work packages of the project

Tasks:
1. identify all of the work packages within your project and list them in your project Smartsheet
2. when you have identified all the work packages, take those that form the central core of the project and, using the Indent and Outdent functions of Smartsheet, break them down into tasks (and/or sub-tasks) and milestones to produce a Work Breakdown Structure

Make sure that every member of the group takes a turn at entering the data.

Resources:
✓ presentation
✓ quick Guide to Smartsheet
✓ group project Smartsheet

Time: 25 minutes

Learning outcomes: 2

Assessment criteria: 2.1
GUIDANCE NOTE - SCHEDULING YOUR PROJECT

We’ll be using a computerised Gantt chart to schedule the project. Like many aspects of project management, scheduling is likely to be an iterative process i.e. one we need to return to, to review and adjust several times. We are unlikely to produce a wholly workable schedule at our first attempt and, almost certainly, we will need to modify details as we track progress, once the project is underway.

A computer programme can make this easier. Also, once we have defined the task dependencies correctly, if we move a task or alter its duration, the programme will automatically recalculate the timing of all subsequent dependent tasks.

Tasks can relate to each other in one of four possible ways:

- **Finish to Start** – Start the task 1 workday after the predecessor task finishes (This is the most common dependency);
- **Finish to Finish** – Finish the task the same day as the predecessor task finishes;
- **Start to Start** – Start the task the same day as the predecessor task starts;
- **Start to Finish** – Finish the task 1 workday before the predecessor task starts.

We can also specify a delay between the finish of one task and the beginning of another. This is known as **Lag time** and is usually calculated in days. We can also enter a negative value for lag, so that a task starts (−n days) before the start of its predecessor.

A **milestone** is treated as a task with zero duration and normally has a Finish to Finish dependency with its predecessor.

Note that in a computerised Gantt chart, the timing of a work package is calculated automatically from the timing of the tasks it contains. Similarly, the timing of a task is calculated automatically from the timing of any subtasks.
**Activity Sheet 6 — Schedule Your Project**

**Aims:**
- ✓ to understand and identify the logical relationships between individual tasks and work packages
- ✓ to produce an appropriate detailed schedule for your project

**Tasks:**
To sequence and schedule the individual tasks that you have identified in the Work Breakdown Structure produced in the previous activity:

1. enter a start date for your project
2. determine the sequence of tasks
3. determine the duration of each task
4. define the relationship between each task (i.e. identify predecessor tasks and any lag time)

**Note:** the timing and duration of each work package/top level task will be determined automatically by Smartsheet, taking the data from lower level tasks.

Make sure that every member of the group takes a turn at entering the data.

**Resources:**
- ✓ presentation
- ✓ quick Guide to Smartsheet
- ✓ group project Smartsheet

**Time:** 30 minutes

**Learning outcomes:** 2

**Assessment criteria:** 2.1
ASSIGNING RESOURCES TO TASKS

ACTIVITY SHEET 7 – ASSIGN RESOURCES TO TASKS

Aims:
✓ identify a team and allocate roles for your project

Tasks:
Review the tasks for the core elements of your project and consider the people needed to carry them out. Then:

1. create a list of the members of your team and allocate tasks to each of them;
2. enter their names or designations in the Assigned To columns against each task in the Smartsheet Gantt chart. (N.B.: it will be useful to include not only people who might form the core project team but also e.g. experts, interpreters, consultants)
3. present your finished Gantt chart to the rest of the course group and contribute any issues raised by this morning’s work to a short feedback discussion in the plenary session.

Make sure that every member of the group takes a turn at entering the data.

Time: 40 minutes

Resources:
✓ presentation
✓ quick Guide to Smartsheet
✓ group project Smartsheet

Learning outcomes: 3

Assessment criteria: 3.1, 3.2
GUIDANCE NOTE - PRODUCING A RISK ASSESSMENT PLAN

Unfortunately, projects do not always go to plan. Internal or external factors can often impact on the project planning and delivery process and project managers must prepare for such eventualities.

One way to do this is to design and develop a specific and dedicated risk assessment for your project.

There are several ways to design your risk assessment. Many risk assessments use a combination of colours or numbers to highlight significant risks. In our example below, we shall make use of a numerical calculation to highlight significant risks.

All risk assessments involve:

✓ identifying the specific risk
✓ considering the likely impact of the risk on the project
✓ considering the probability of the risk
✓ putting in place specific controls or actions that will minimise the risk

In the design of our risk assessment, we have used a score, 1 to 5 (5 being highest) to highlight the severity of the impact of the risk on the project.

We then applied a probability score, again 1 to 5 (5 being highest) against the probability of the risk occurring.

We then multiply the two scores (impact and probability) together to obtain a total score (out of a maximum of 25).

Once we have a total score for each risk, we assign a rating (low, moderate, high) to each risk.

In our example, all risks except the risk relating to losing access to the workplaces are found to be moderate. The risk relating to losing access to the workplace is found to be ‘high’.
Controlling the risk

Again, following our example; against each of the risks we have noted a number of control measures and actions that will act to reduce the probability of the risk occurring.

We have then re-evaluated the risk and given it a new score; this is called the **residual risk**.

We then re-evaluated the probability of the risk occurring with the control measures in place, again giving each risk a new score.

As before, multiplying the two scores (residual risk and probability) will give each risk a final total score.

In our example and looking at the final total scores, you will see that all risks that initially were ‘moderate’ are now ‘low’ and the single ‘high’ risk is now ‘moderate’.

To matter what form the design of your risk assessment takes, the applied methodology is very useful in managing projects. However, project managers should use and update risk assessment documentation throughout the lifetime of the project. The documentation also needs to be shared and understood by all members of the project’s senior management team.
ACTIVITY SHEET 8 – PRODUCE A RISK ASSESSMENT PLAN

Aims:
✓ discuss appropriate methodologies to manage risk
✓ identify potential problems or issues relating to your project
✓ identify solutions and potential contingency plans and produce a risk assessment plan

Tasks:
1. following the presentation, identify potential problems relating your project. Construct a list and prioritise your list;
2. identify possible solutions and potential contingency plans for each of the risks you have identified;
3. using the Risk Assessment template, create a risk assessment plan for your project

Time: 40 minutes

Resources:
✓ guidance Note
✓ Environmental Project Risk Assessment
✓ Risk Assessment template (located on group laptops)

Learning outcomes: 3, 4

Assessment criteria: 3.4, 4.1, 4.2
Often, we tend to look at the evaluation as something to be dealt with at the end of the project or half-way through the project, and then just concentrating on the end results. The overall evaluation represents a chance to understand what is working well or less well, in order to avoid problems in the future, and – at the end- to look back and reflect within the partnership, with stakeholders and participants, what we have achieved together. A good evaluation helps to do all this.

We also need to treat it as a great learning experience, a chance to understand more about what works well and what doesn’t work so well. If we do meet problems, it’s important to understand as much as we can about why they’ve happened and how they might have been avoided. And at the end of the project, we need to reflect together on what we’ve learned and what we’ve achieved, and how those insights might be useful in the future work of our organisations.

First of all, let’s start by defining what we understand by ‘evaluation’: we mean an assessment carried out at one or more specific points in the life-cycle of a project, in terms of its stated objectives. Evaluation often involves assessment at the start of the project (to establish a baseline condition for the project), at the mid-point (to assess progress), at the end of the project (to assess its direct results and achievements). It can also be very useful to conduct an assessment sometime after completion of the project (to establish its longer-term impact and outcomes).

We can distinguish two types of evaluation:

1. **formative evaluation** is conducted during the lifetime of the project, providing information to improve ongoing activity. The principal beneficiaries of formative evaluation would normally be the project partners and participants;

2. **summative evaluation** is undertaken retrospectively, at or after the end of the project, reviewing key aspects of the project’s activities, results and outcomes and their significance. The principal beneficiaries of summative evaluation would normally be project partners and stakeholders through, for example, the highlighting of significant issues concerning the incorporation of project results into mainstream organisational activity or the design and implementation of future projects.

To be effective, evaluation needs to have a **clear focus**. The best starting point is the objectives of your project and the performance criteria, which are the reference points for an evaluation.
As it is difficult, if not impossible, to evaluate all the dimensions, we need to develop an evaluation plan. In preparing the plan, we need to answer to the following questions:

✓ Why are we conducting this particular evaluation exercise?
✓ What will we be evaluating?
✓ Who will be responsible?
✓ When will the evaluation take place?
✓ How will we evaluate the selected aspects?

There are two evaluation methods:

1. **qualitative**: through interviews, surveys, observation, focus groups, review reports and project documentation, and
2. **quantitative**: through questionnaires, surveys, monitoring and progress reports, statistics - participation types and levels, financial analysis.

We wish to draw your attention here on another essential activity, **monitoring**.

The differences between evaluation and monitoring are:

✓ **monitoring** is implemented throughout the project period, while evaluation as said earlier is carried out on a limited number of occasions
✓ **evaluation** is expected to be a more in-depth, analytic process than monitoring, while monitoring consists of supervision of all the activities and comparing their progress with the original work plan.

**What** should be monitored? Activities and resources, assumptions, results, impacts, quality, budget and time.

The monitoring process generates the data and the full amount of information for your report activity on audience. We suggest to using a standard format to allow comparisons over time, like the two templates used by the SEK colleagues in a real project (at the end of the handout).

Now we’re going to come back to your project outline and to the next group activity, the aim of which is to produce an evaluation plan.
ACTIVITY SHEET 9 – PRODUCE AN EVALUATION PLAN

Aims:

✓ review and discuss evaluation methodologies referred to your project
✓ identify appropriate evaluation methodologies for your project
✓ prepare an evaluation plan for your project

Tasks:

1. following the presentation, discuss and identify evaluation methodologies relevant to your project
2. choose an appropriate evaluation process for your project. Produce an evaluation plan which shows clearly when and how evaluation will take place and who will be responsible
3. update your schedule in the Smartsheet. Ensure that you cover the following aspects: tasks, timing and allocation of responsibilities. Prepare to report back

Time: 30 minutes

Resources:

✓ presentation hand-out
✓ a template
✓ schedule
✓ including the task 3 assignment

Learning outcomes: 5

Assessment criteria: 5.1, 5.2
GUIDANCE NOTE - BUDGET AND FINANCES

This is an area where many people from trade union contexts feel insecure. Often, they may simply leave the question of budget and project finance to a finance officer from the union to handle. Whilst it’s a very good idea to work closely with your finance department, it’s important, too, that you, as project manager, understand the project finances and are in a position to manage them effectively.

The assumption for this course is that your project will be largely funded by grants, probably from the European Commission. Any funding body is going to require from you a budget for the project. However, don’t just rely on the budget form from a project application document to prepare a management budget for the project and to control project finances. Start by making a comprehensive detailed budget for the project yourself in a form that you feel comfortable with. You can then adapt this to meet any requirements of the project application documents and to manage the budget efficiently, once the project is running.

In this session, we’ll be looking at how to construct a budget for managing the project. We’ll be using a spreadsheet programme to compile a budget for part of your project and exploring how to manipulate and represent data in variety of different forms. We’ll be using MS Excel to do this, but most spreadsheet programmes work in a similar way. If you’re not already familiar with the basic functions of a spreadsheet programme, it would be a good idea to spend a little time acquiring these skills.

During the session, there will also be an opportunity to ask questions and to share experiences – about preparing budgets, about income sources, about EU financial regulations and about managing project finances more generally.
ACTIVITY SHEET 10 – CREATE THE BUDGET

Aims:

✓ to produce a detailed budget for one element (one major work package) of your project, using a spreadsheet programme

Tasks:

1. open the Excel spreadsheet that you will find on the Desktop of your group’s computer or on the USB key received. This will provide you with a template for your budget
2. select one major task (element) of your project, and work through it task by subtask, entering information and costs in the Excel worksheet, as appropriate. (NB. In most cases you will not have accurate information on actual costs, so make best guesses). Then sub-total the costs by task number.
3. when you have completed Task 2, save a copy of the worksheet. In the copied worksheet, sort and subtotal the costs by partner organisation and by cost category.
4. if you have time left, you may wish to carry out the same exercise with another work package
5. nominate a spokesperson to present your budget to the rest of the course participants

Resources:

✓ presentation
✓ excel handout and excel spreadsheet, see pages 76-78
✓ Your Smartsheet

Time:

✓ group activity: 60

Learning outcomes: 2

Assessment criteria: 2.2
<table>
<thead>
<tr>
<th>Project name</th>
<th>Budget for Workpackage no:</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total cost</td>
<td>No.units</td>
<td>Unit cost</td>
<td>Unit type</td>
<td>Cost category</td>
<td>Details</td>
<td>Name/title of project partner</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
GUIDANCE NOTE - PRODUCING A DISSEMINATION PLAN

Now we are going to focus on another very important element of project management: the dissemination plan. We can define “dissemination” as a planned process of informing your audiences (key actors, users and stakeholders) about your project and its products.

Why do we need a dissemination plan? Like any other funder, the European Commission wants the project promoter to publicise the project and its results. It is also a contractual requirement to publicise the fact that the project, or the event, or the product is funded by the EC. To do this, we are required to use a specific logo and text, supplied by the Commission. In addition, the dissemination plan forms an important part of the funding contract and is an essential work package in your project plan.

To plan all the necessary activities, you will have to identify your project’s various audiences first:

✓ internal: people and groups within your project and your partners’ organisations
✓ external: people and groups outside your project (e.g.: for a new training programme: end users, trainers, training providers, education departments in Ministries and social partner organisations, professional societies and other NGOs)
✓ a special case: your funding authority/reporting

Then, think also about these audiences at local, national and European levels and categorise them.

After the identification and categorisation phases, think about the following questions:

✓ which strategy for which audience/target group?
✓ what kinds of information about your project do you need to give each group?
✓ which interesting aspects (exhibitions/events)?
✓ at what points in the project/appropriate timing?
✓ which languages?
✓ what kinds of channels & media (adequate means)?
✓ human & financial resources?
✓ a documentation system?
✓ a responsible person/partner?

Last, but not least, you should also plan all the necessary measures/tasks to circulate information about your project and its products (websites, social media, folders, press-conferences, etc.). To do this, take advantage of any opportunity!
You will be given an opportunity to reflect on your dissemination plan for your project by making notes in your workbook. Your course tutor will assist you in doing this at the end of the working day when you visit your project work book.
GUIDANCE NOTE - DESIGN A MANAGEMENT AND COORDINATION STRUCTURE

We need to look in more detail at how the management of the project relates to the management structures of our trade union organisation and to be aware of areas where problems may emerge. Every organisation needs to have some way of dividing up work, and with responsibility and accountability. This is what provides the basic structure of the organisation and how it operates. A project, however, has a different profile and, as a consequence, it needs a different kind of management structure, as it is essentially a work group, with fewer hierarchical layers.

The work team is likely to be a much more fluid organism than the organisation itself. Any work team has two dimensions:

1. the “task dimension”, where the focus is on what the group is trying to achieve, and
2. the “group dimension”, where the focus is on the internal relationships and dynamics: the quality of group life.

Each project inevitably becomes a small organisation in its own right and it needs to be controlled and managed. How? Some good starting points:

✓ potential conflict needs to be recognised and understood;
✓ before embarking the project, its aims must be understood both by project team and by senior managers within the organisation;
✓ there needs to be a clear understanding about what resources can be committed in the project, an agreed process in decision making and a clear and effective structure of communications.

To understand fully the context of the project and to be able to manage it effectively, we need to identify all of its stakeholders and understand their various interests. The project stakeholders are all those organisations (and individuals) who are actively involved in the project or whose interest may be affected by its work. Their interest in the project and the objectives they hope to achieve may differ considerably from stakeholder to stakeholder: this is an essential ingredient to be taken into account in framing the initial project plan.

Team problems can become even more complex in transnational projects involving not one but several partner organisations. Each of those organisations is likely to have its own organisational structure, its own way of operating, its own aims and priorities, its own history. Problems may occur when aims, structures, priorities and cultures of different partner organisations interact with a project team. Many could be avoided.
with a careful preparation and planning: agree from the very beginning aims, priorities, resources, decision-making structures and communications.

About the managerial roles and responsibilities within the project. It’s helpful to identify:

- a “project director”, who will take the overall responsibility of the project, and
- a “project manager”, who will be responsible for the detailed planning, administration and day-to-day management of the project.

It may also be useful to designate specific people as “workpackage coordinators” and for each partner a “partner representative”. It is also essential to establish a “project management committee” responsible for taking key policy and management decisions. Its composition could vary from project to project, but it should normally include one representative from each of the main partner organisations.

Effective communication is one of the keys to successful project management. Communication pervades project work at every level, with both formal and informal exchanges. Formal elements can be planned, such as:

- meetings: they should figure as tasks with the project management workpackage;
- means of communication: e-mails are cheap and fast and provide a record of communication;
- document circulation: the project manager should sit at the heart of the communication process. Circulation lists and check boxes can be a great help;
- documentation system: essential requisites are a comprehensive and well-ordered filling system and a common reference system for identifying documents;
- dissemination: establish a clear and comprehensive plan for communication both within the project team and between the project team and external bodies, with the project manager at its centre.
ACTIVITY SHEET 11 – DESIGN A MANAGEMENT AND COORDINATION STRUCTURE

Aims:

✓ design an appropriate management structure for your project
✓ establish how you will manage relationships with members of the project team and key stakeholders
✓ identify appropriate processes for monitoring progress, managing change and reporting

Tasks:

1. following the presentations, design a management structure that includes the following roles and any other roles that you consider relevant to your project: project director, project manager, partner organisations, members of the project team; end users, stakeholders, ‘sponsors’ of the project. You may choose to use a diagram to illustrate your management structure.
2. using a flip chart, describe how you will establish and manage relationships with members of the project team and key stakeholders
3. using a flip chart, identify appropriate tools and techniques for monitoring progress, managing change and reporting

Time: 35 minutes

Resources:

✓ presentation hand-outs
✓ roles and responsibilities grid
✓ Smartsheet

Learning outcomes: 3

Assessment criteria: 3.1, 3.2, 3.4
### Worksheet – Roles and responsibilities grid

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsible to</th>
<th>Responsible for</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
COURSE EVALUATION

ACTIVITY SHEET 12 – EVALUATE THE TRAINING

Aims:

✓ to evaluate key aspects of this course in terms of your individual experience
✓ to discuss with your other course participants, key aspects of this course that you thought particularly useful or enjoyed
✓ to discuss with your other course participants, aspects of the course that could be further strengthened or improved

Task 1 – Individual evaluation and reflection:

Please take five minutes to complete the Evaluation sheet. Do not pass your completed form to your tutor until the end of this activity. You may need it to inform the discussion for Task 2.

Task 2 – Group evaluation and reflection:

Your tutor will put you into groups. Please discuss the course, elements of the course and any associated topic (such as pre-course information and instructions) with other participants in your group.

During your discussion, you might like to comment on three aspects of the course that you thought particularly useful or enjoyable. In addition, you may wish to comment on three aspects of the course that could be further strengthened or improved.

Time:

✓ Task 1 – 5 minutes
✓ Task 2 – 30 minutes

Resources:

✓ Evaluation sheet

Report back: nominate a spokesperson to present your group’s views to a plenary discussion.
Please indicate your degree of satisfaction with the course (1 min / 5 max):
If you give a low score please give reasons for this.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Were your general expectations for the courses met?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>How clear were the course objectives?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Did you receive sufficient pre-course information?</td>
<td>YES</td>
<td>NO</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Please score the added value of this course in terms of:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.1</td>
<td>✓ content</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.2</td>
<td>✓ transnational perspective</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.3</td>
<td>✓ intercultural exchanges (formal)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.4</td>
<td>✓ intercultural exchanges (informal)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Working methods:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.1</td>
<td>✓ plenary sessions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.2</td>
<td>✓ working groups</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.3</td>
<td>✓ presentations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.4</td>
<td>✓ materials</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Division of time</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>How useful did you find this type of course for you and your trade union?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Language support:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.1</td>
<td>✓ interpretation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.2</td>
<td>✓ written translations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Work carried out by the teaching staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>The training venue</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>The organisation of the course</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
12. **General impression of the course**  

13. **Do you have any comments or suggestions to make regarding the organisation and contents of a future similar course?**

14. **Other comments:**

Your name: ____________________________________________

Please hand your completed evaluation form to the tutor. Thank you!
PART 2 – WORKBOOK

Prior to attending this Intermediate Course in Project Management, you were asked to complete and bring with you, a pre-course activity. This activity was designed to encourage you to start to think about developing a project idea relevant to your trade union setting.

As you work through the course activities this week, we ask you to consider what you have learnt during each of the course activities and reflect how this new learning will impact on your original project idea.

This workbook will give you the space and the structure to enable you to apply your newly developed thinking to your original project idea.

To do this effectively, we recommend that you try and spend a few moments, perhaps after each activity or at the end of the working day, to consider the following points:

✓ how will what I have learnt impact on my project idea?
✓ what, if anything, needs to change concerning my project idea?
✓ can I now add more detail(s) to my original idea and plan?
✓ what do I need to do next regarding my project idea?

You will need to apply some if not all of the above questions to each of the key activities on the course. These key activities are:

✓ developing my project’s Aims and Objectives
✓ developing a Work Breakdown Structure
✓ assigning Resources to Tasks
✓ producing a Risk Assessment Plan
✓ producing an Evaluation Plan
✓ project Budget and Finances
✓ producing a Dissemination Plan
✓ design a Management and Coordination Structure
✓ next Steps
Developing my project’s Aims and Objectives

✓ how will what I have learnt impact on my project idea?
✓ what, if anything, needs to change concerning my project idea?
✓ can I now add more detail(s) to my original idea and plan?
✓ what do I need to do next regarding my project idea?
Developing a Work Breakdown Structure

✓ how will what I have learnt impact on my project idea?
✓ what, if anything, needs to change concerning my project idea?
✓ can I now add more detail(s) to my original idea and plan?
✓ what do I need to do next regarding my project idea?
Assigning Resources to Tasks

✓ how will what I have learnt impact on my project idea?
✓ what, if anything, needs to change concerning my project idea?
✓ can I now add more detail(s) to my original idea and plan?
✓ what do I need to do next regarding my project idea?
Producing a Risk assessment plan

- how will what I have learnt impact on my project idea?
- what, if anything, needs to change concerning my project idea?
- can I now add more detail(s) to my original idea and plan?
- what do I need to do next regarding my project idea?
Producing an Evaluation Plan

 ✓ how will what I have learnt impact on my project idea?
 ✓ what, if anything, needs to change concerning my project idea?
 ✓ can I now add more detail(s) to my original idea and plan?
 ✓ what do I need to do next regarding my project idea?
Project Budget and Finances

✓ how will what I have learnt impact on my project idea?
✓ what, if anything, needs to change concerning my project idea?
✓ can I now add more detail(s) to my original idea and plan?
✓ what do I need to do next regarding my project idea?
Producing a Dissemination Plan

✓ how will what I have learnt impact on my project idea?
✓ what, if anything, needs to change concerning my project idea?
✓ can I now add more detail(s) to my original idea and plan?
✓ what do I need to do next regarding my project idea?
Design a Management and Coordination Structure

✓ how will what I have learnt impact on my project idea?
✓ what, if anything, needs to change concerning my project idea?
✓ can I now add more detail(s) to my original idea and plan?
✓ what do I need to do next regarding my project idea?
Next Steps

✓ how will what I have learnt impact on my project idea?
✓ what, if anything, needs to change concerning my project idea?
✓ can I now add more detail(s) to my original idea and plan?
✓ what do I need to do next regarding my project idea?
PART 3 - ANNEXES

LIST OF ANNEXES

✓ Smartsheet pack
✓ Excel notes
**SMARTECH PACK**

1. **Views**

Most sheets in Smartsheet have 3 views – 3 different ways of viewing the same data:

**the Grid view:**

![Grid View](image)

**the Gantt view:**

![Gantt View](image)
the Calendar view:

We will start by using the Grid view and then progress to the Gantt view. You can switch between views by clicking on the appropriate icon in the left-hand toolbar (see 4 below).

2. Home

Clicking on the Home button will allow you to see and access all of the sheets that have been shared with you.

Clicking on Create New will allow you to create additional sheets. It will at the same time mean that you need to either set up and pay for a full user account or to set up a 30-day free trial. The 30-day free trial will allow you to create up to 10 new sheets. After the free trial has expired, you will be able to view the sheets, but not to edit them. Do not click on the Create New button, unless you are sure you want to do this.

3. Account

Clicking on the Account button allows you to various things, including changing the language of the interface and Help pages (Personal settings > Language (Country)); setting up a Contacts list (useful for assigning tasks to people – see 13 & 14 below); and for Signing Out.
4. Left-hand toolbar

Most of the functions in the left-hand toolbar are straightforward. We’ve highlighted just the icons that you are likely to need for your work on the course.
5. **Indent & Outdent**

*Indent* is a way of indicating hierarchy among rows in Smartsheet. When you indent a row it becomes the ‘child’ of the ‘parent’ row above it. This is useful, for example, in clarifying the relationships between workpackage, tasks and sub-tasks. You can first enter a row with the title of the workpackage, then indent to enter the ‘child’ rows with various tasks contained in the workpackage. A further indent at that stage would then indicate sub-tasks.

To **Indent** a row, place your cursor in the row and click on the **Indent** icon. To restore it to its previous position, click on the **Outdent** icon.

**Important:** If you delete a ‘parent’ row, this will automatically delete any ‘child’ rows attached.

6. **Collapsing and expanding**

You can expand or collapse indented items beneath a ‘parent’ row by clicking on the + or – sign at the left of the row in the **Task Name** column.

You can collapse or expand all the *indented rows* by right-clicking on the header of the **Task Name** column and selecting *Expand all / Collapse all*.

7. **Row Actions menu**

Clicking on the down-arrow next to the row number will bring up the **Row Actions menu**, allowing you to insert, copy or delete rows, as well as other actions. You can also use the **Insert key** on your computer keyboard to insert rows above other rows.
You can also find a menu with most of these functions by right-clicking in other columns.

8. Using the Gantt View

Having used the Grid View to produce a Work Breakdown Structure, you can then move to the Gantt View to **produce a schedule** for the project. You can still add /edit tasks in the Gantt view.

In producing the schedule, you will be defining:

- ✓ Start and finish dates for the project and for individual workpackages and tasks
- ✓ Task duration
- ✓ Task relationship (e.g. which task(s) must be completed before another task can start)

Smartsheet calculates some of these things **automatically**:

- ✓ the Start and End dates and the Duration of ‘parent’ rows (e.g. workpackages) are automatically calculated from the data in the ‘child’ rows (e.g. tasks). As long as a workpackage contains information on tasks, the scheduling of the workpackage row will be automatic.
- ✓ Start and End dates of rows may also be determined by any Predecessors (see 10 below). For example, if you make Task 1 a Predecessor of Task 2 (e.g.
Task 1 must be completed before Task 2 can begin), then all the information that needs to be entered is its Duration; its Start date will be determined automatically by the data for Task 1.

9. **Gantt bars**

The bars in the Gantt chart are produced automatically, determined by the Start and End Date data in the columns in the left-hand side of the screen.

You can also use the cursor to **move** the Gantt bars and to **lengthen or shorten** them. Placing your cursor directly over a Gantt bar will transform the cursor to a +. Depressing the left-hand button of your mouse will allow you to drag and reposition the Gantt bar. Placing your cursor at either end of a Gantt bar will produce a ⇔, allowing you to drag to extend or shorten the Gantt bar, altering the duration of the task.

Altering a Gantt bar in this way will automatically alter the dates in the left-hand columns of the row and will also alter the timing of any tasks for which this is a Predecessor.

10. **Task dependency**

As noted in 8 above, Smartsheet allows you to define the relationship between tasks. The details of any tasks on which the current task directly depends are noted in the Predecessor column. To define the task dependency of any task, click in the Predecessor column for that row and then click on the pencil icon to the top right of the cell. This will open the **Edit Predecessors** screen.
Use the drop-down list of tasks to select one or more Predecessor tasks, select the Type of task dependency and any Lag time, then click OK.

Types of task dependency

Smartsheet allows 4 types of task dependency:

- **Finish-to-Start**: the Predecessor task must be completed before the present task can begin. This is the default position and the most common form of task dependency, with the current task starting the day after the end of its Predecessor(s)
- **Finish-to-Finish**: both the Predecessor task and the current task must finish at the same time. This is particularly useful for Milestones (see below); otherwise the Milestone would be placed a day later by default
- **Start-to-Start**: both tasks must start on the same day
- **Start-to-Finish**: the current task must have started before the Predecessor task can finish

Lag time

Sometimes there needs to be a period of time between, for example, the end of one task and the beginning of another that is directly dependent on it (e.g. mailing out questionnaires and collating responses). This is known as Lag time. Smartsheet also allows you to enter negative Lag to indicate, for example, that the current task must start 10 days before the Predecessor task is completed.

11. Milestones

A **milestone** is a task with zero duration. It is used to mark significant events such as the completion of a work\ or major deliverable. On the Gantt chart it is represented by a ♦.
12. Other features in the Gantt view

The illustration below highlights other useful features in the Gantt view.

13. Task assignment

In the project sheets for the course, you will find 2 columns: Assigned To and Assigned To 2 for allocating people to tasks. This allows for one lead person and one other per task. If you need to assign more than two people to a task you can do one of the following:

- just type in two or more names as a single entry (e.g. ‘Researcher 1 + Researcher 2’) or use some kind of collective term (e.g. ‘Team’, ‘Trainers group’). This is probably the easiest solution.
✔ add a separate task row for each person and just use the first Assigned To column
✔ ask your tutor to add more person columns to your sheet. You can then continue to make individual entries

In the Assigned To columns in Smartsheet, you can either just type in the name/role of the person(s) to whom the task is assigned, or you can select from a drop-down list. For names to appear on the drop down list, they need to have been entered in your Smartsheet Contacts list.

14. Creating Smartsheet Contacts

This can speed up the process of task assignment. Go to Account>My Smartsheet contacts>Add. Each contact requires a name and an e-mail address but these can simply be invented e.g. tutor@yyyy.org and then edited later.

15. More about Smartsheet

Smartsheet is a flexible and sophisticated programme; we will be using only a small selection of its features. It is a collaborative tool, allowing multiple users with different levels of access (view, edit, etc) and supporting multiple projects. Among its other features are:

✔ tracking progress and completion of tasks
✔ attaching documents to tasks
✔ sending e-mail alerts & reminders
✔ facilitating e-mail discussions of tasks
✔ handling simple budgets
✔ producing tailored reports
✔ tracking individual workloads

It has extensive user support, including templates, Help sheets and video demonstrations of most features. As well as being accessible via a standard web browser, there are mobile versions (with more limited functionality) for smartphones, iPads and tablets, as well as downloadable apps for iOS and Android devices – see http://help.smartsheet.com/customer/portal/articles/890351-mobile-access-options.
During the session on Project Finances and Budget, we shall be using the spreadsheet programme Excel to produce part of a project budget. You do not need to have any prior knowledge of Excel and how to set up formulae, etc, as you will be using a template with all of this already programmed in.

One of the advantages of using a spreadsheet programme is that it can manipulate, re-calculate and re-present the same data in different ways. The activity during the course will require you, once you have established an initial budget, to **copy**, **sort** and **subtotal** this, using the Excel program. These notes describe how to do this.

**Copying a worksheet in Excel**

There may be times when you want to create a new Excel worksheet based on an existing worksheet. The **Move or Copy** command allows you to easily move or copy a worksheet, with all of its data and formatting, to a new sheet or to a new book. First open the workbook with the sheet you need. Select the worksheet you want to move or copy by right-clicking on the worksheet’s tab at the bottom of the Excel window. Select **Move or Copy** from the popup menu.

![Move or Copy dialogue window](image)

This will open the **Move or Copy** dialogue window.

![Move selected sheets](image)

For this exercise, we will be **copying** (not moving) to a new sheet in the same workbook.
In the **Move or Copy** dialogue window, check the box next to **Create a copy**.

From the **To book** drop-down list, you can select the current workbook (the default), another existing workbook that is open, or you can open a new book to contain the copied worksheet. For today’s task, just select the current workbook.

Then from the **Before sheet** list, select the worksheet before which you want to place the new copy worksheet. You can select *(move to end)* to insert the worksheet after all the existing worksheets in the workbook. Now click **OK**.

You’ve now created a copy of the original worksheet that you can edit, whilst still keeping the original copy safe in its original form. You can rename the worksheet by clicking in the worksheet’s tab at the bottom left of the Excel window and entering a new name.

**Sorting data in Excel**

For this part of the exercise, we need first to select the data to be sorted, including any column descriptors. Put your cursor in **Cell A5** and, while keeping the left-hand mouse button depressed, **drag it downwards and to the right** to highlight and select all the financial data in your worksheet, including all the column headers in Row 5.

Then click the **Data** tab on the ribbon at the top of the screen and, with the data in the worksheet still selected, go to the **Sort & Filter** panel.

In the **Sort & Filter** panel, click **Sort**. A dialogue window appears:

First, check the **My data has headers** box.

Then click the down arrow beside the **Sort On** box to reveal the drop-down list of column headers. Select the appropriate column to sort by.

Excel offers various choices under the **Sort On** and **Order** drop-down menus. For today’s exercise, select **Values** and **A to Z**. Then click **OK**.
Subtotalling data in Excel

Once you have sorted the data, you are ready to use Excel’s subtotalling function.

Make sure that the data you wish to subtotal is still highlighted and selected from the sort process; if not, you will need first to select it again, exactly as you did before sorting the data.

With the Data tab on the ribbon selected, go to the Outline panel and click on Subtotal.

This will open the Subtotal dialogue window.

From the At each change in drop-down menu, select the category by which you want to subtotal.
From the Use function list, select Sum.
Then select the column where the subtotal should appear (in this case, Total Cost).
Make sure that Replace current subtotals and Summary data below are checked. Then click OK.
This will then outline your data with subtotals inserted, as well as a global total.