TC Project Management Webinar

European Bank
for Reconstruction and Development

Purpose of Workshop

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Develop a shared vision across the team about why and how Technical Cooperation (TC) projects should be delivered.

Agenda

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- Why does Technical Cooperation need a practice guide?
- Theoretical underpinning
- Why values and behaviours are important
- Technical Cooperation programmes, projects and assignments
- Components of a Technical Cooperation project
- Roles and responsibilities
- Sustainable change Technical Cooperation lifecycle
- Detailed Technical Cooperation phase descriptions
- Supporting processes
- Technical Cooperation project management resources
- Definitions

TC Practice Guide Key Features

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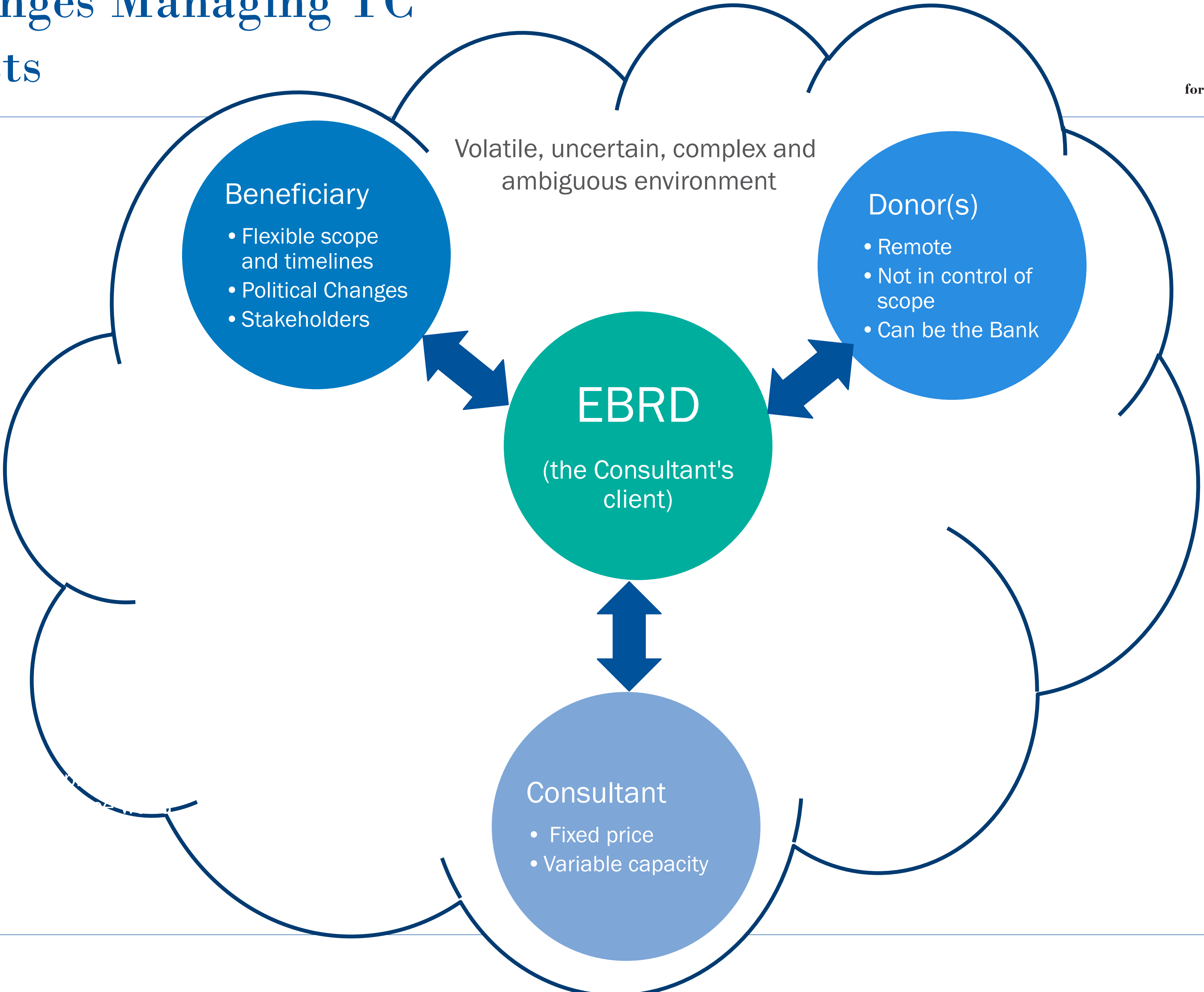
- Adopts a principle based approach to the definition of the outcome
- Breaks a long term goal into a flexible pathway.
- Integrated three workstreams
  - Policy,
  - Process,
  - Information Technology.
- Provides guidance on the administration of projects, roles, lifecycle phases.

Challenges Managing TC Projects



Triangle of Balance

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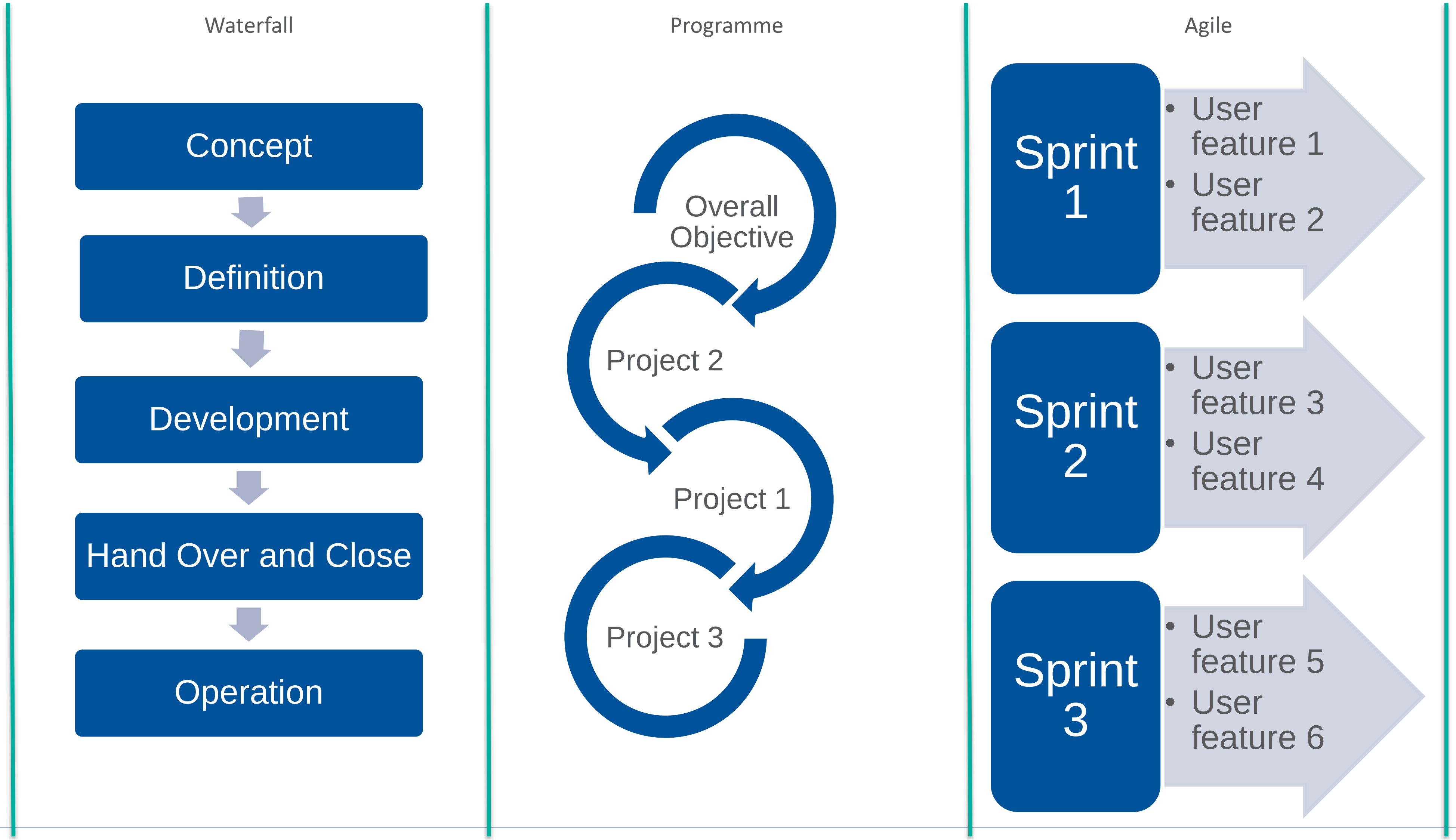
Theoretical underpinning

Development Methods within this Practice Guide



RESULTS BASED MANAGEMET

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Implementation

Results

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INPUTS

Actions taken or work performed through which inputs, such as funds, technical assistance and other types of resources are mobilized to produce specific outputs..

ACTIVITIES

Actions taken or work performed through which inputs, such as funds, technical assistance and other types of resources are mobilized to produce specific outputs. .

DELIVERABLES

The products and services which result from the completion of activities within a development intervention..

OUTCOME

The intended or achieved short-term and medium term effects of an intervention's outputs, usually requiring the collective effort of partners. Outcomes represent changes in development conditions which occur between the completion of outputs and the achievement of impact.

IMPACT

Positive and negative long-term effects on identifiable population groups produced by a development intervention, directly or indirectly, intended or unintended. These effects can be economic, sociocultural, institutional, environmental, technological or of other types

THEORY OF CHANGE

How and why a desired change is expected to happen

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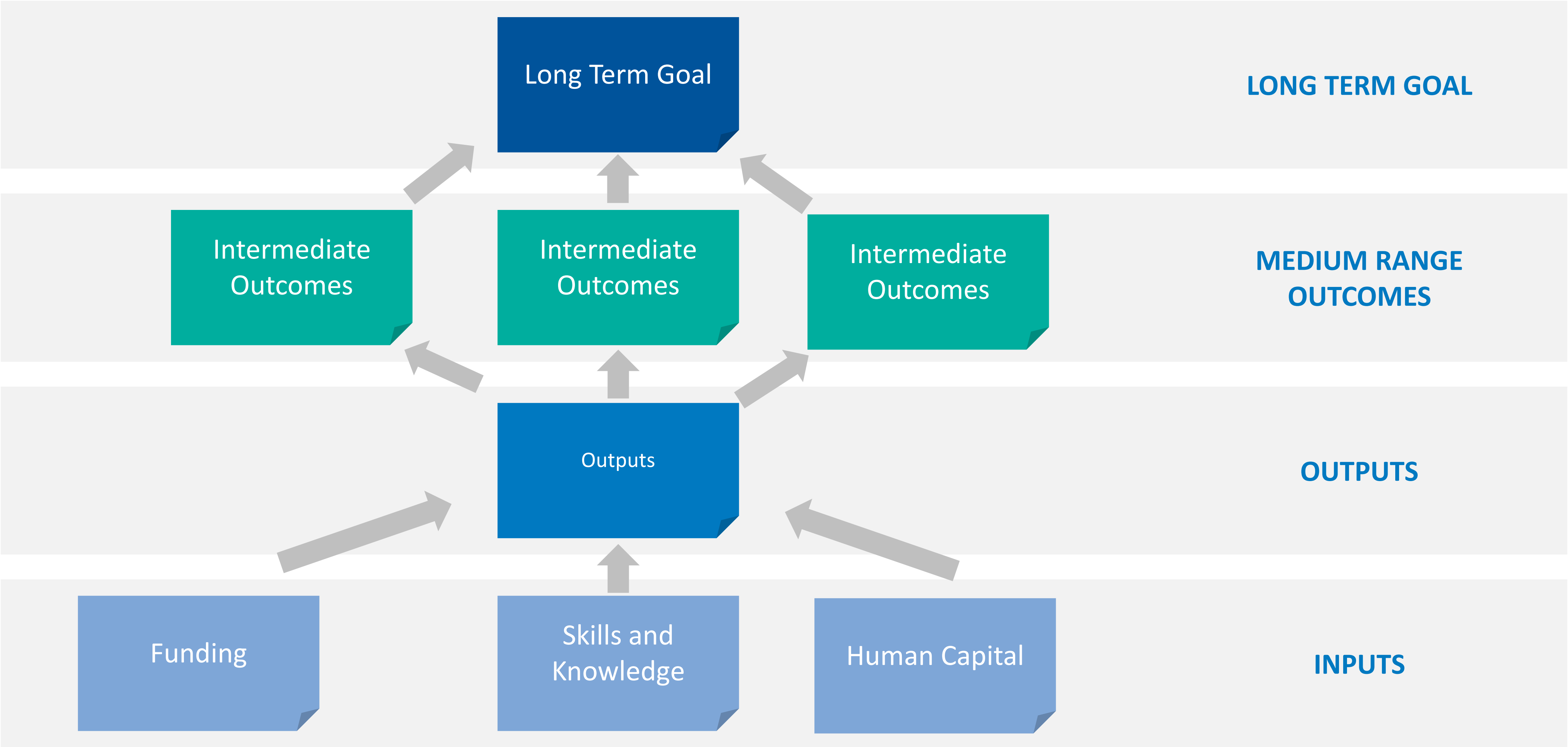
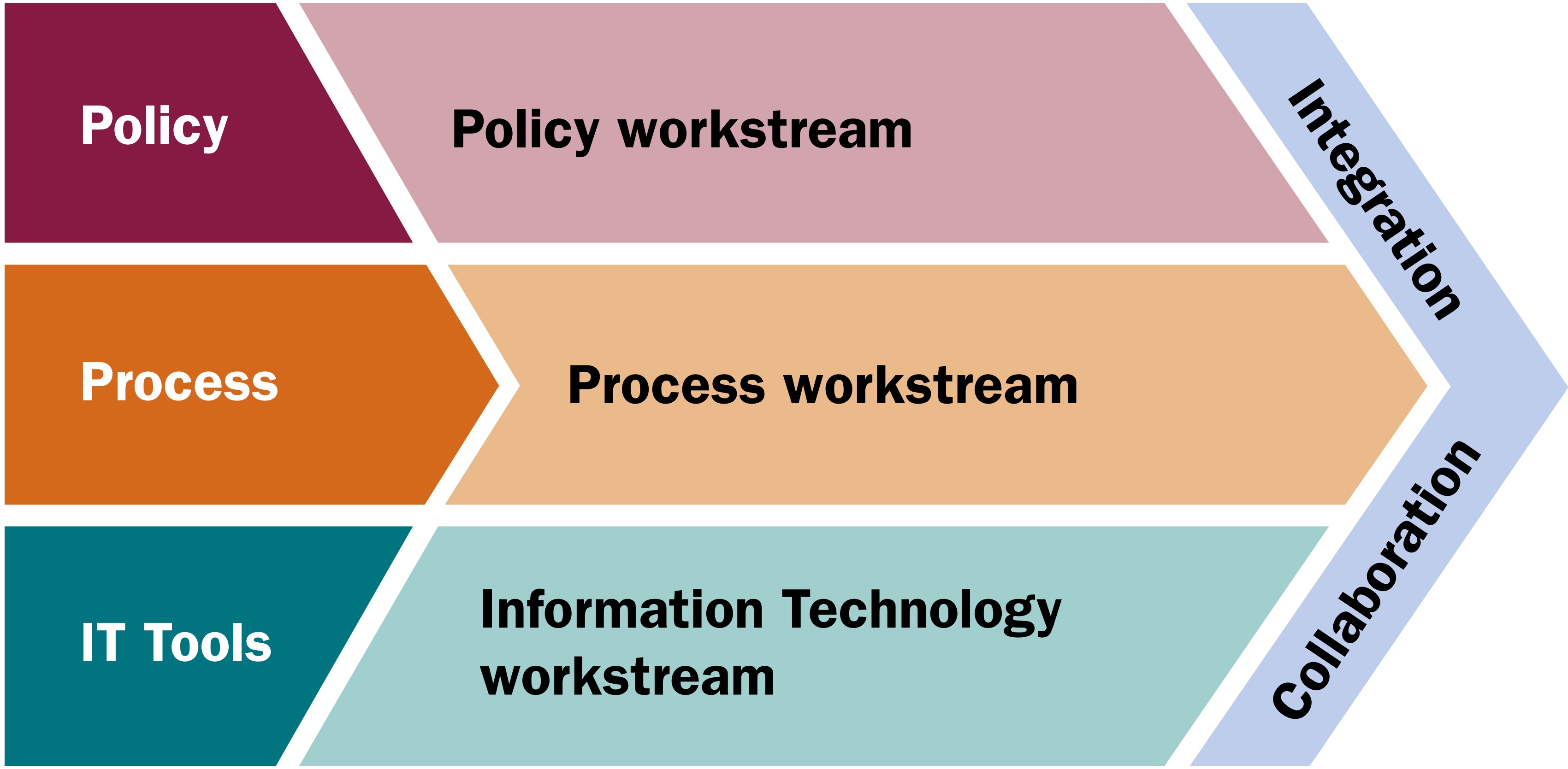


NEW SUSTAINABLE CHANGE

An integrated and collaborative approach to change



Values and behaviours

FRAMEWORK VALUES

UNDERPINNING PRINCIPLES

Expertise

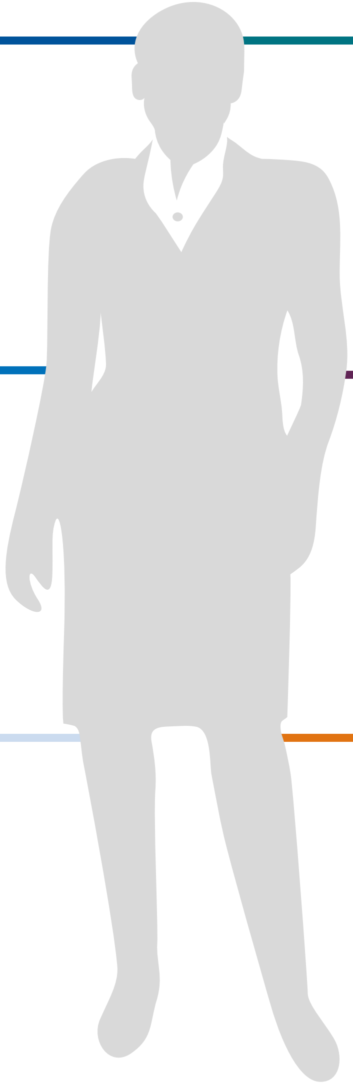
TC projects bring together world class experts from many disciplines, backgrounds and cultures. This mix of experts creates challenges and opportunities, hence the need for collaboration.

Collaboration

Working collaboratively to meet the needs of others is never easy. It can mean putting the need of the project over your own needs. We must all strive to understand the objectives and constraints of partner organisations.

Learning

Every project is unique but success builds upon the learning from previous projects. Capturing and sharing the learning from each project raises the competence of all those involved and improves the capacity to deliver more complex projects in the future. We should create opportunities for experts to share knowledge with the wider team.



Responsibility

Working with others within a common method requires responsibility and discipline. The basics must be done well by everyone. Short cuts or failing to follow simple rules just creates more work for everyone.

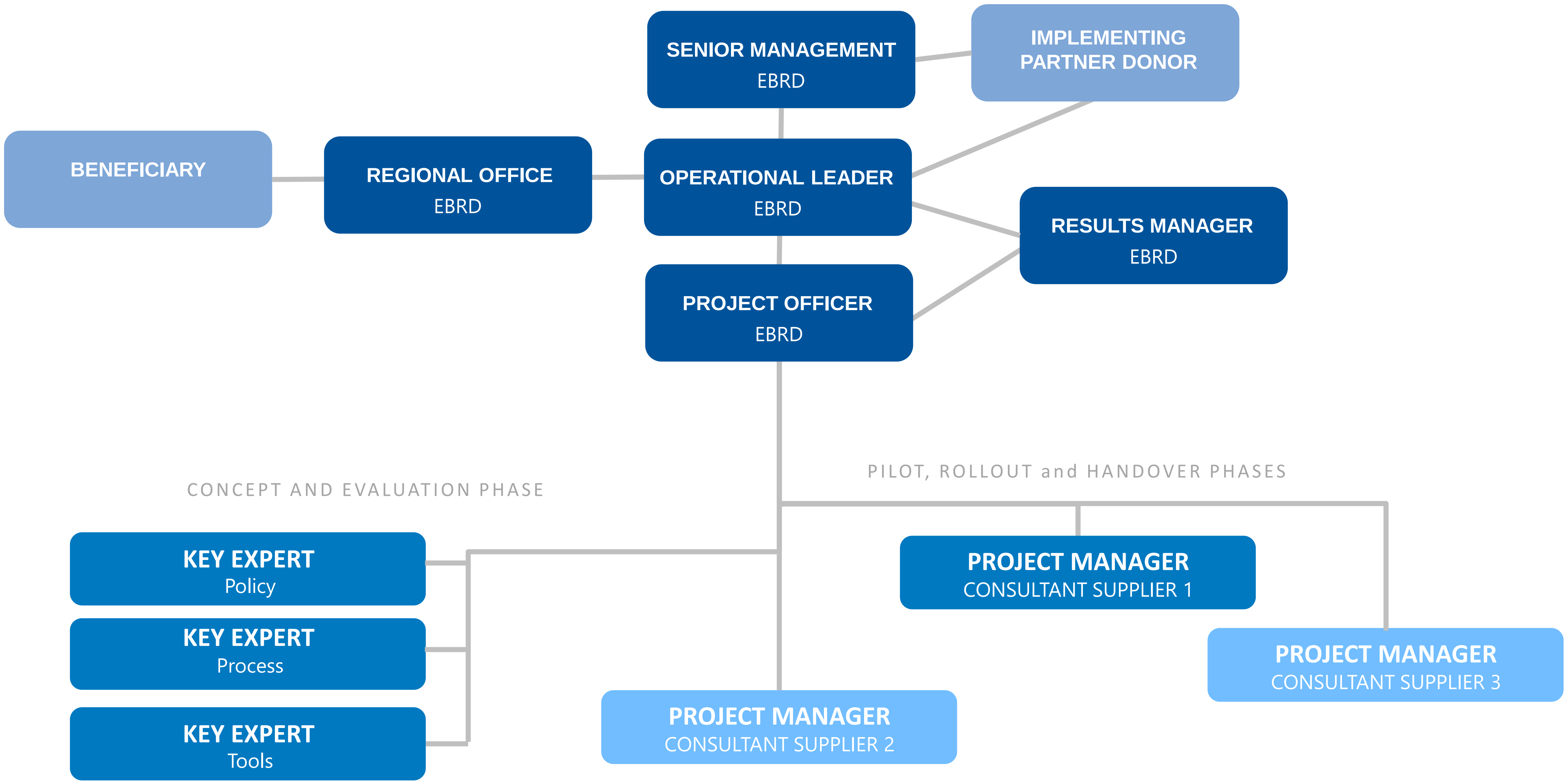
Delegation

Delegation means accepting personal responsibility for day-to-day management of the project. We all need to earn trust by keeping our promises. Do not give a personal commitment to something if you can not deliver it.

Transparency

Progress reporting and communication must always be open and honest. Problems and challenges will be shared so that the team can collaborate to find solutions. Failure to highlight a problem or issue just makes things worse.

ORGANIZATIONAL CHART



Role of the Beneficiary Government

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- Initiate request for TC to the Bank;
- Agree scope of TC project design proposed by the Bank and sign grant agreement.
- Form project counterpart team within beneficiary lead entity;
- Fulfil obligations in grant agreement or agreed separately with the Bank e.g.
  - Activities to be undertaken by Beneficiary,
  - Working with the Bank's appointed technical consultants;
  - Sign off Deliverables/Reports prepared by the technical consultants, including the Inception Report.

Role of the Donors

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- Review request from the Bank to contribute grant funds to a TC project and agree its intended outcomes and outputs in the draft results matrix.
- Commit grant funds to the TC if they see value in the outcomes.
- Receive and review reports from the Bank on the progress of the project and raise any issues of concern e.g. :
  - Slow disbursement;
  - Delays or problems with project implementation;
  - Request for increase in contribution/s;

Donors are ultimately interested in the achievement of the outcomes.

Responsibility of the Bank

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<u>Pre-project</u>

- Review request from potential beneficiary government for TC
- Select and appoint TC consultants to undertake pre-project design study or develop and document TC project design including:
  - Results matrix (outcomes and outputs);
  - Budget;
  - TC consultants TORs.
- Secure agreement to grant funding (normally from multiple donors and EBRD)
- Sign TC project inception report with beneficiary

Responsibility of the Bank - 2

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Project implementation phase

- Select and contract TC consultants through competitive international tendering;
- Carry out project kick-off meeting with TC consultants to discuss project implementation and agree method of working with the Bank e.g.:
  – Project reporting
  – Review and approval of consultants deliverables;
  – Use of Bank's document management system (Huddle) and EBRD templates
  – Change control
  – Issue/risk reporting

- Supervise project implementation (OL)
- Participate in consultants inception mission and subsequent project missions
- Respond to requests from the consultants on issues affecting the performance of the project
- Facilitate reform progress with the Beneficiary
- Reporting progress of the project to donors and EBRD grant management team;
- Monitor progress in achieving project outcomes and outputs in the project's results matrix.
- Prepare promotional material on benefits of the project
- Close project.

Responsibility of the Consultant

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- Sign consultancy contract with the Bank
- Participate in project kick-off meeting with the Bank's Operational Leader (OL) to discuss TORs, results matrix, draft project plan etc
- Prepare and agree structure/content of Inception Report
- Undertake Inception Mission (normally with OL)
- Finalise Inception report and submit to the Bank for review and approval
- Commence consultancy activities on project deliverables:
- Store all project documents in the file structure on Huddle prescribed by the Bank
- Submit written project progress report to the OL
- Promptly raise issues with the OL affecting the delivery of the project;
- Update and submit revise project plans to the OL if necessary
- Assist with the preparation of promotional material for the project (research/ text/ PowerPoint for publication/outreach activities)
- Prepare and submit Reports for each deliverable for review and approval by the Bank's OL and Results Manager including project completion report

Project Manager

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Delivers the project to enable the benefits

The project manager is responsible for day-to-day management of the project and must be competent in managing the six aspects of a project, i.e. scope, schedule, finance, risk, quality and resources. Well-developed interpersonal skills such as leadership, communication and conflict management are also vitally important.

Role includes

- Manages the project
- Owns the project management plan
- Manages the team
- Influences stakeholders
- Liaises with end users
- Manages suppliers

APM Body of Knowledge 6th edition

Structure of projects

Key Definitions

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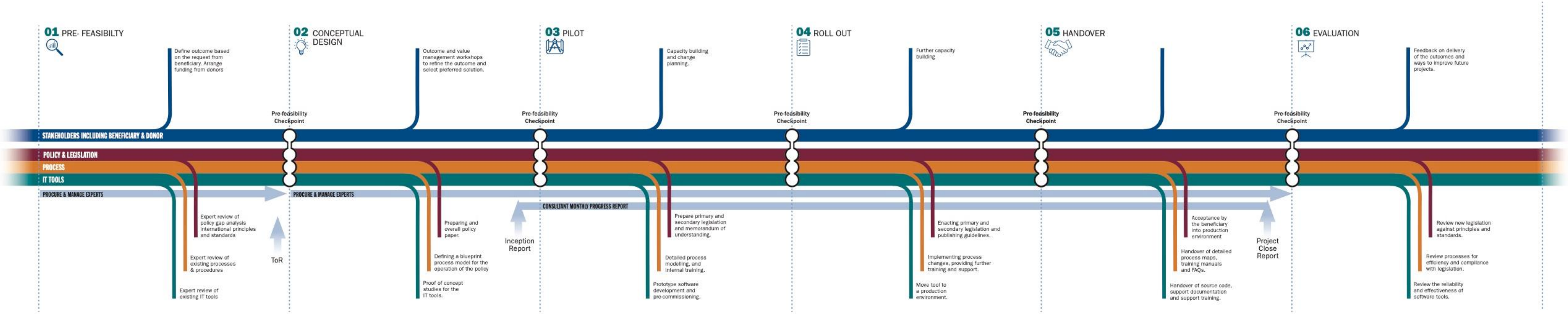
Purpose/ Impact	• Change in peoples lives e.g. countries benefiting from active participation in world trade.	Owned by the Bank and Beneficiary recorded in results matrix
Outcome	• Change in institutional capacity or behaviour. e.g. Government officials implementing WTO GPA and recognising member country rights and obligations.	
Outputs	• Changes in skills, abilities or behaviours of individuals or institutions. e.g. number of countries accepting a gap analysis against WTO GPA or people with qualification.	
Deliverables	• A work package is a collection of activities that produce one or more deliverables. e.g. develop an on-line tool.	Owned by the consultant and the Bank via the contract.
Activity	• Actions or work preformed through which inputs result in outputs. e.g. user acceptance testing for an on-line tool.	

Lifecycle

Project Management Framework for this Project



01 TC Development – Pre-feasibilty

The purpose of this phase is to respond to the request for assistance and define the problem statement and desired outcome of the TC project (Results Matrix), agree the approach and estimated costs, and seek concept clearance approval from the OGC management and grant review for funding from donors.

Policy path – Legal GPA analysis

During this phase, a desk review of the law will be prepared. This is typically based on a legal gap analysis between international legal instruments such as the GPA, UNCITRAL or EU standards and local legislation. This gap analysis will identify the minimum of required legal changes in the local regulatory framework.

Process path – Initial to-be process

An initial high level business process model will be prepared to inform the TC development. The BPMN will describe the minimum scope of institutional and process changes required to support the implementation of the revised policy to meet regulatory gaps identified in the legal analysis.

Tools path – As-is analysis

The policy and governance process changes need to be supported by new or modified e-services or digital government solutions. At this early stage, this work is limited to analysis of digital government capacities of the potential Beneficiary and exceptionally a fact-finding mission will be undertaken to interview technical owners at the Beneficiary.

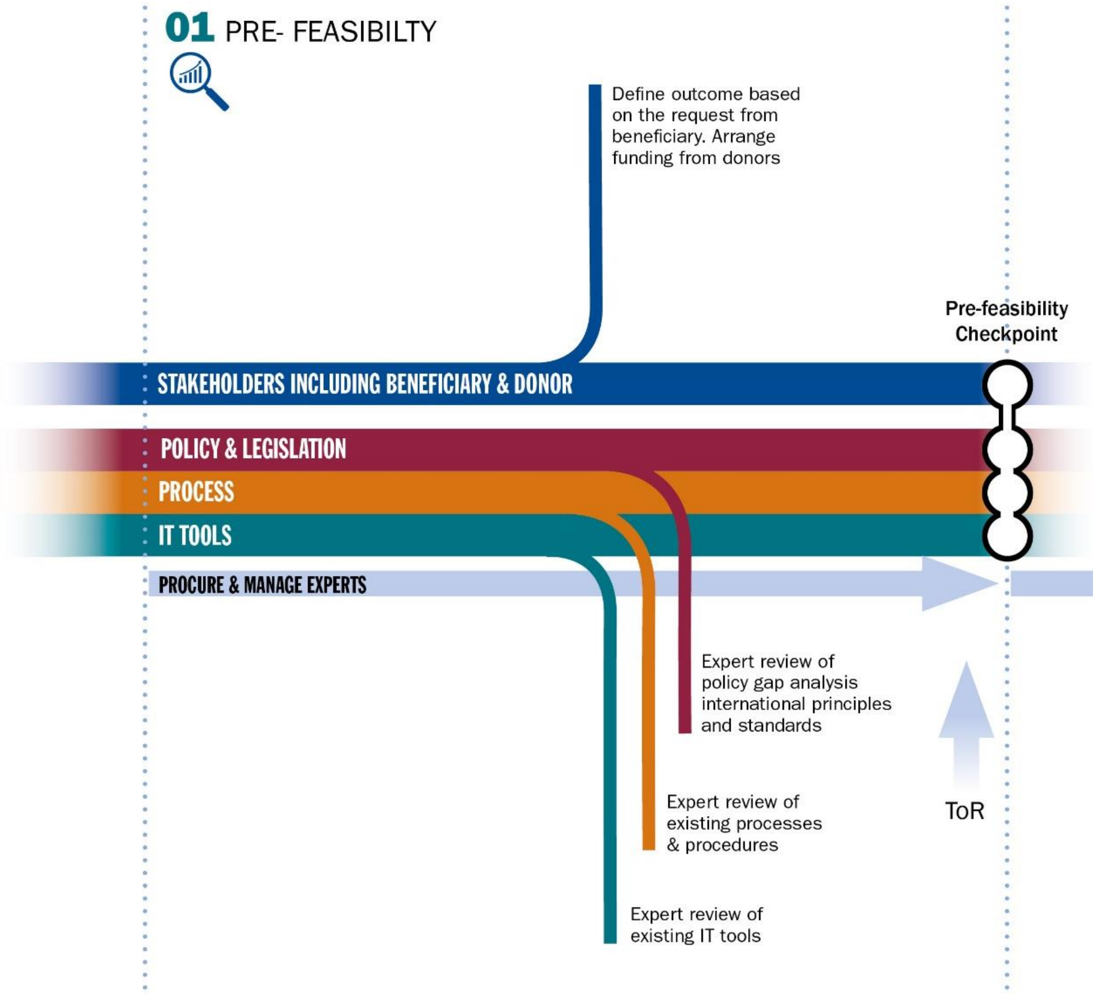
End of phase checklist

Mandatory TC development outputs

- [ ] Draft Results Matrix
- [ ] Draft Concept Clearance Memorandum
- [ ] Estimated Budget
- [ ] Provisional Terms of Reference

Optional deliverables

- [ ] Draft Legal Gap Analysis/ Benchmarking Report
- [ ] Report from fact-finding mission on digital tools
- [ ] High level BPMN of governance process



Project Stakeholders

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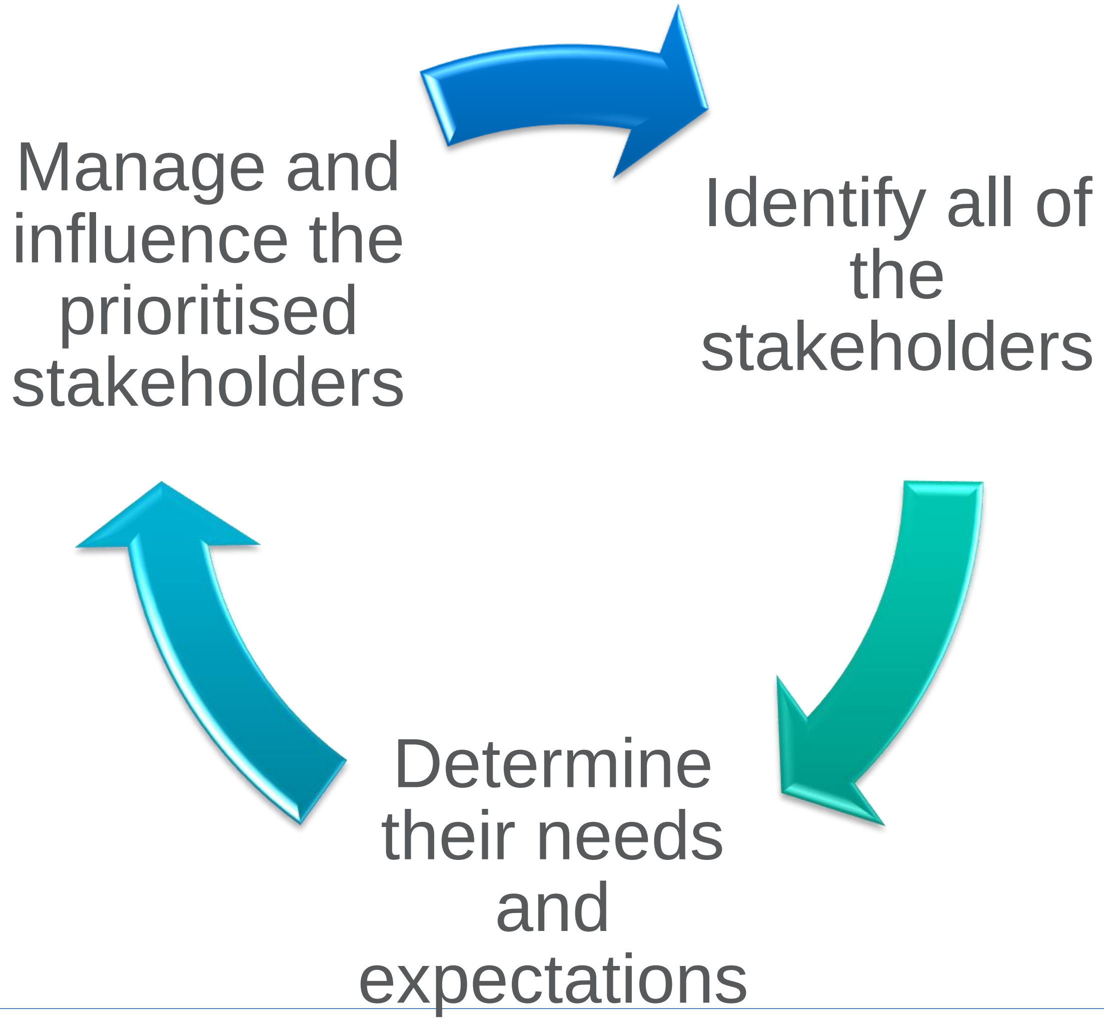
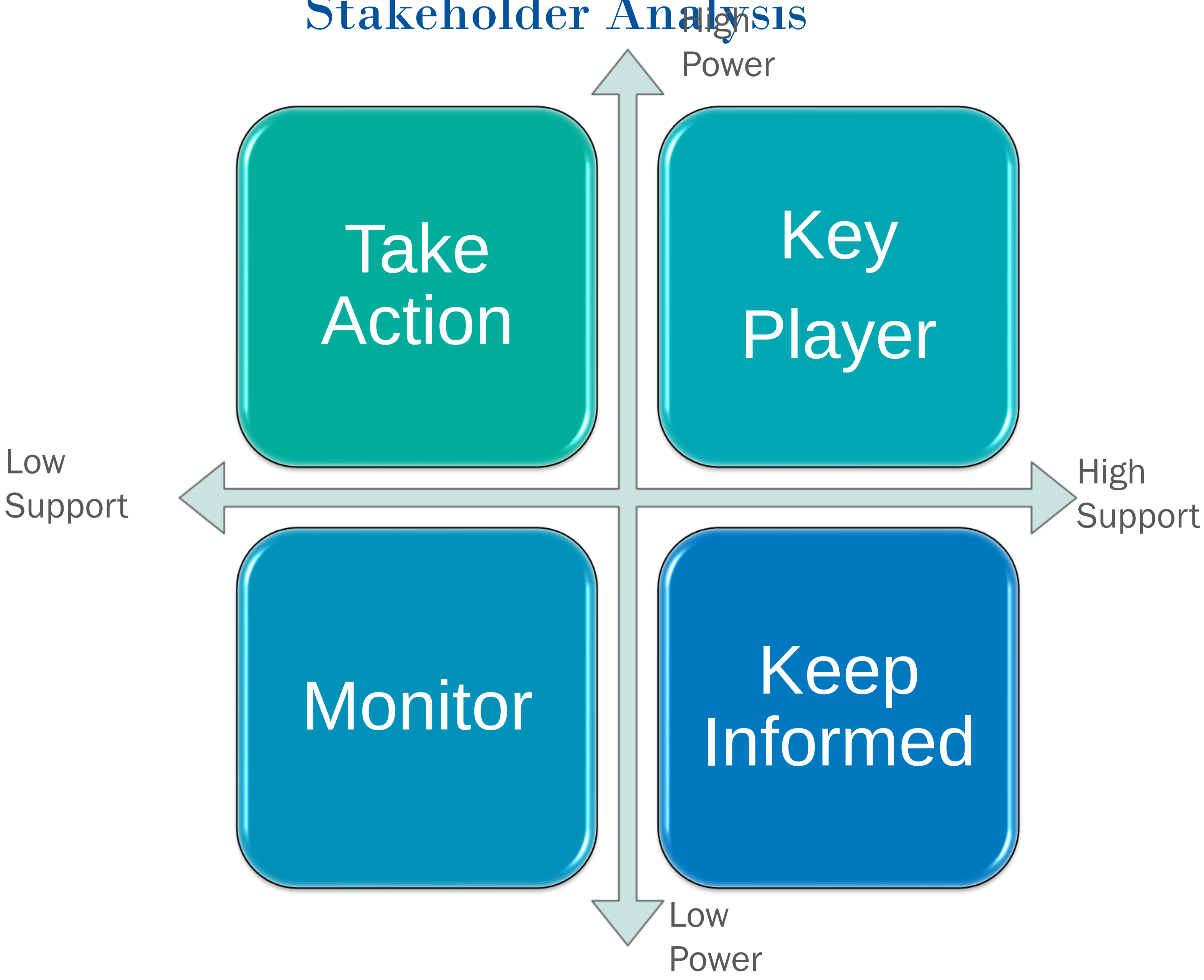
People or organisations who have a vested interest in the environment, performance and/or outcome of the project

Stakeholder Management



Stakeholder Analysis



Example Stakeholder Analysis
EBRD GPA TC Facility Digital Procurement Implementation

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Stakeholder and basic characteristics	Interests and how affected by the problem(s)	Capacity and motivation to bring about change	Possible actions to address stakeholder interests
Government Officials: Government employees at an operational level involved in public procurement. Experts in the current processes and procedures with good relationships with existing suppliers.	Many be very comfortable with the current ways of working. Has a deep interest in the detail of the process. However some may be more open the change.	• Has a significant capacity to support changes to open procurement. • Many may be cautious about the changes, due to a wide range of concerns. • May have concerns about job security or reduction in roles status.	• Identify key players within the community of to patriciate in pilot. • Provide training on new processes and legislation.
Local SME Suppliers; A group of small and medium size suppliers who form the majority of the existing suppliers. Typical from 2-500 employees. 70% with repeat business.	• Open procurement reduce turnover of profit. • Could even affect livelihoods of some less competitive suppliers. • Some could have an opportunity to grow.	• May be resistive to change and lack the necessary skills to Have financial and technical resources to employ new cleaner technologies • Limited current motivation to change	• Invite local trade associations to participate in plot projects.

WTO GPA Training Programme Results Matrix

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Project Description	Indicators How will we know this has be achieved?	Source of Verification Sources of information for data?
Purpose: Change in peoples lives e.g. countries benefiting from active participation in world trade. e.g. Developing and LDC Members are benefiting from their active participation in the WTO.	e.g. Share of developing Members' total trade (imports and exports) in world trade	WTO Statistics (from ERSD)
Outcome: Change in institutional capacity or behaviour. e.g. Government officials implementing WTO GPA and recognising member country rights and obligations.	e.g. Number of outstanding notifications by TA beneficiaries Members	WTO Notifications database
Output: Changes in skills, abilities or behaviours of individuals or institutions. e.g. number of countries accepting a gap analysis against WTO GPA or people with qualification.	e.g. 1) Number of participants completing each PLS level. 2) Number of participants in WTO training activities.	WTO training database
Activities: The **tasks** (work programme) that need to be carried out to deliver the planned results (optional within the matrix itself) e.g. Designing training programmes. Running training programmes	e.g. 1) Number of training programmes available. 2) Number of training sessions completed 3) Number of people trained by gender.	

Source: WTO GPA BIENNIAL TECHNICAL ASSISTANCE AND TRAINING PLAN 2018–19

EBRD Results Matrix Difference between Outcomes & Output

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Project Outputs

Activities undertaken by the Consultants resulting in the completion of the deliverables in the TORs: e.g. Draft secondary legislation on eProcurement is adopted by the Ministry of Finance

Progress measurement:
Target completion date and actual completion date

Project Outcomes

Example: The GPA adopts lessons from piloting new public procurement legislation on the online framework agreements and shopping mall.

Progress measurement:
Outcome Indicators e.g. Revisions to the primary laws and the new secondary legislation on eProcurement is enacted
Target Value & Baseline

EBRD TC Project Results Matrix

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RESULTS MATRIX

TC Reference ID: 44299

RESULTS MATRIX (V 0.4)

Title: Mongolia: Public Procurement Policy Advice, Legislative Drafting and Implementation Support: Phase 2

Purpose of this TC and links to investment operation (if any)

The Bank, through a techncial cooperation country project of the EBRD UNCITRAL Initiative on Public Procurement will assist the Ministry of Finance (the "MOF") and the Government Procurement Agency (the GPA) in revising primary and secondary legislation and developing a new secondary legislation for electronic procurement procedures in order to provide for public procurement refrom implementation. This will bring Mongolian public procurement regulation into line with international best practice and the 2011 UNCITRAL Model Law on Public Procurement standards in particular. The project will next assist the Government Procurement Agency in implementation of the revised public procurement regulations in practice.

Reporting Schedule	Progress Report 1	Progress Report 2	Completion
	Jul-15		Jul-16

Transition Impact indicator

Transaction / Donor Indicators	Target Value		Baseline		Data source
	value	date	value	date	
	value	date	value	date	

EBRD TC Project Results Matrix

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Outcome

The GPA adopts lessons from piloting piloting new public procurement legislation on the online framework agreements and shopping mall

Outcome Indicator	Target Value: value	Target Value: date	Baseline: value	Baseline: date	Datasource
Outcome Indicator 1: Revisions to the primary laws and the new secondary legislation on eProcurement is enacted	1	Jul-15	0	Jul-14	Gazeteer or equivalent
Outcome Indicator 2: Final eProcurement procedures and framework agreeement methodology incorporating lessons are approved by the Client	100%	Jul-16	0	Jul-14	Client's records

Output	Target Value: value	Target Value: date
Output 1: Draft secondary legislation on eProcurement is adopted by the Ministry of Finance	1	Dec-14
Output 2: Standard bidding documents and standard technical specifications for goods are accepted by EBRD and the Client	2	Mar-15
Output 3: An implementation methodology for framework agreements is accepted by EBRD and the Client	1	Mar-15
Output 4: GPA and the MoF staff are trained in eProcurement and framework agreement procedures and practices	30	Jul-15
Output 5: Report on findings from piloting new public procurement legislation on the online framework agreements is accepted by EBRD and the Client	1	Dec-15

Notes

Checking Intervention Logic in the Results Matrix

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Bottom Up

IF adequate activities are undertaken **THEN** deliverables can be produced;

IF the deliverables are produced, **THEN** outputs can be achieved;

IF outputs are achieved, **THEN** the outcome will be realised;

and **IF** the outcome is achieved, **THEN** this should contribute towards the overall purpose

Top Down

IF we wish to contribute to the overall purpose, **THEN** we must achieve the outcome

IF we wish to achieve the outcome, **THEN** we must deliver the specified outputs

IF we wish to deliver the outputs, **THEN** the specified deliverables must be produced; and

IF we wish to produce the specified deliverables, **THEN** we must complete the activities.

Terms of Reference

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- Background; the context for the project, PESTLE and the Windows of Wisdom. Key stakeholders, overview of the project to date.
- Assignment Objectives; Specific objectives for the project. Outcomes and outcome indicators
- Scope of Work: Deliverables For example:
  - Deliverable 1 – Support in the First Round of Bilateral Negotiations with GPA Parties for North Macedonia
  - The Consultant will assist the government of North Macedonia delegation in Geneva in completing bilateral negotiations with GPA parties based on the initial GPA offer.
  - A report outlining the Consultants inputs to the negotiations, including all written policy materials will be submitted to the Bank by the Consultant.
- Consultant’s profile; CVs of proposed consultants and experience delivering similar projects
- Implementation arrangements: Reporting, the use of huddle, invoicing and issue escalation

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End of phase checklist

Mandatory TC development outputs

- ☐ Draft Results Matrix
- ☐ Draft Concept Clearance Memorandum
- ☐ Estimated Budget
- ☐ Provisional Terms of Reference

Optional deliverables

- ☐ Draft Legal Gap Analysis/ Benchmarking Report
- ☐ Report from fact-finding mission on digital tools
- ☐ High level BPMN of governance process

02 TC Conceptual design

In this phase, the TC definition is prepared by OL working with the Key Experts and the Beneficiary to refine the expected outcome and explore different ways in which it can be achieved.

Policy path – Policy paper

During this phase, the policy paper will be finalised and the scope of regulatory reform is defined.

Process path – To-be business model

During this phase, the business process model is developed and agreed with stakeholders.

Tools path – Technical concept

During this phase, the Technical Concept with a blueprint for toolkits and digital government tools is developed and agreed.

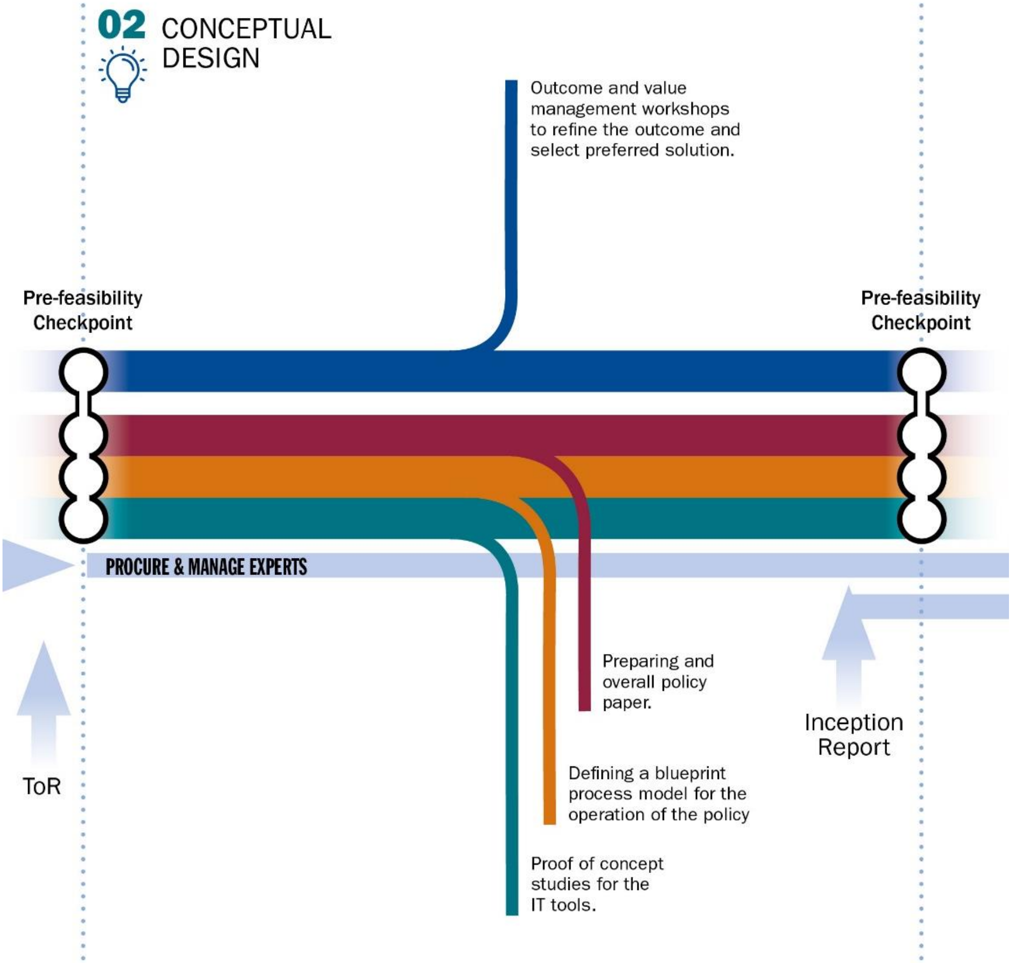
End of phase checklist

Mandatory TC development outputs

- [ ] Finalised Terms of Reference/s
- [ ] Final Estimated Budget/s
- [ ] Procurement plan
- [ ] Policy paper
- [ ] To-be governance model in BPMN
- [ ] Technical concept for implementation

Optional deliverables

- [ ] Road map for complex/phased/long-term TC



The Theory and Change Outcome Pathway

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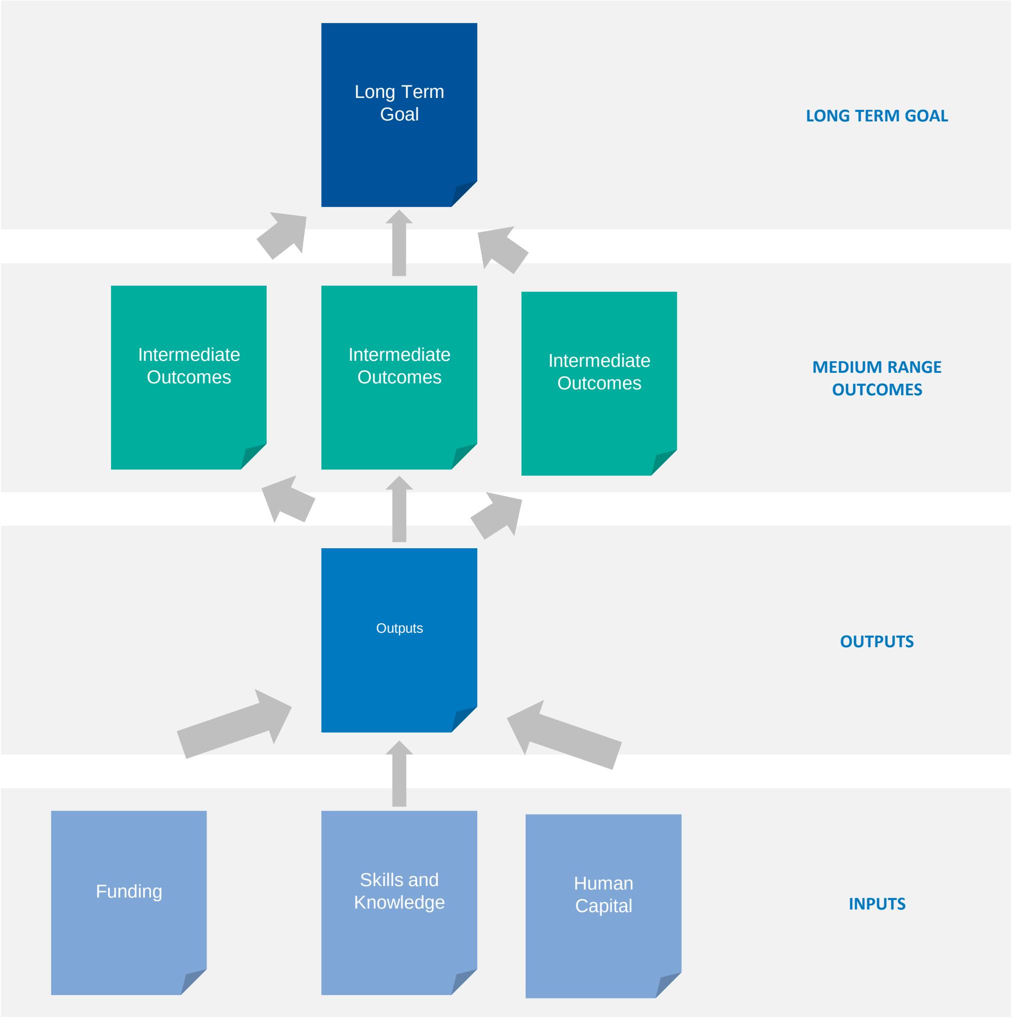
At a workshop with the Beneficiary and other key stockholders.

1. Identifying long-term goals
2. Backwards mapping and connecting the preconditions or requirements necessary to achieve that goal and explaining why these preconditions are necessary and sufficient.
3. Identifying your basic assumptions about the context.
4. Identifying the interventions that your initiative will perform to create your desired change.
5. Developing indicators to measure your outcomes to assess the performance of your initiative.
6. Writing a narrative to explain the logic of your initiative.



Business **Process** Modeling Notation Mapping

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Step 1 - Draw the organization

Step 2 - Draw the participants

Step 3 – Identify Events: start, stop, intermediate, timer, message

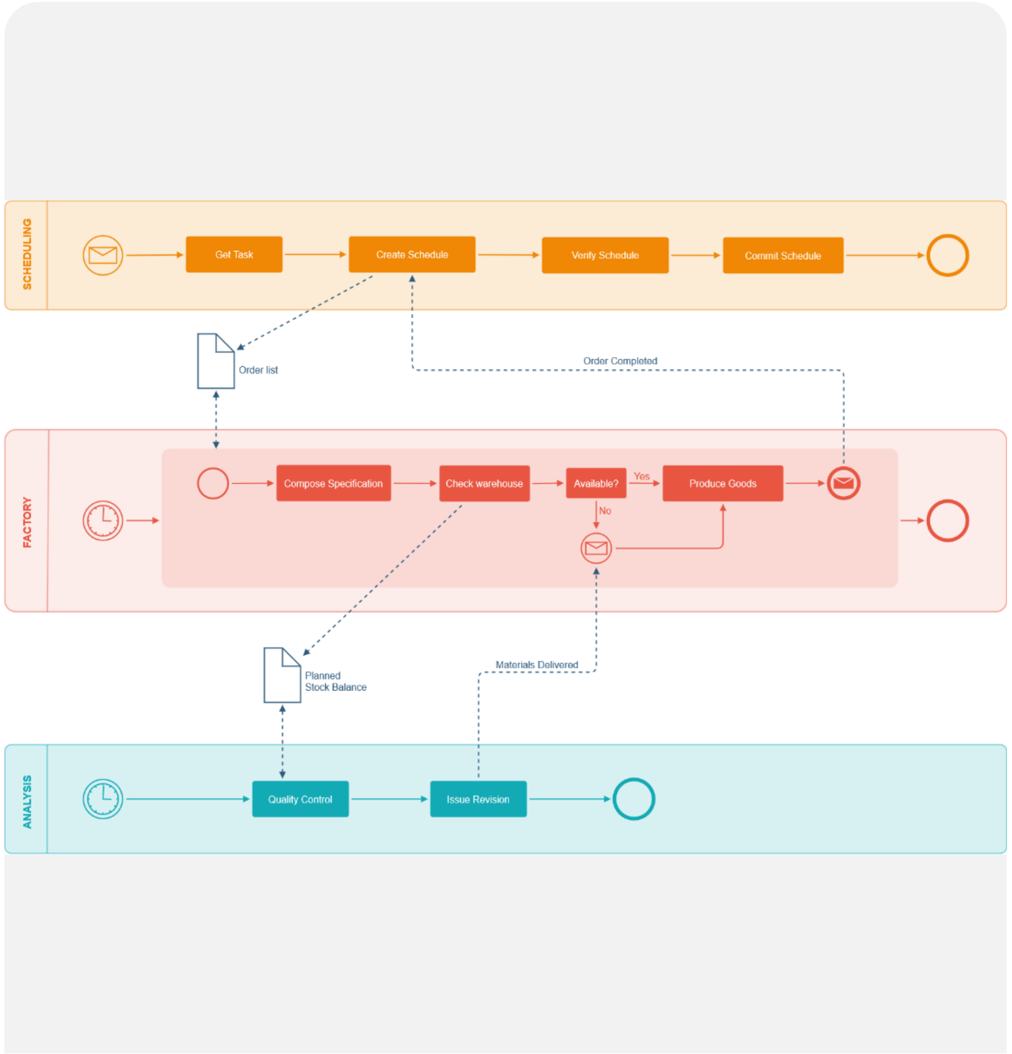
Step 4 – Identify Activities: task, sub process, send, receive, user, manual, business rule, service, script, task

Step 5 – Identify Gateways: Exclusive, Inclusive, Parallel,

Step 6 – Determine Connection: Sequence, Message, Association

Step 7 – Add information data objects, group, Text annotation

Step 8 – Review the Process



IT Blueprint

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A IT Blueprint translates business process into overall IT requirements. It includes:

1) Project specifics Who is involved? Include the product owner, team, stakeholders? When is it projected to ship?

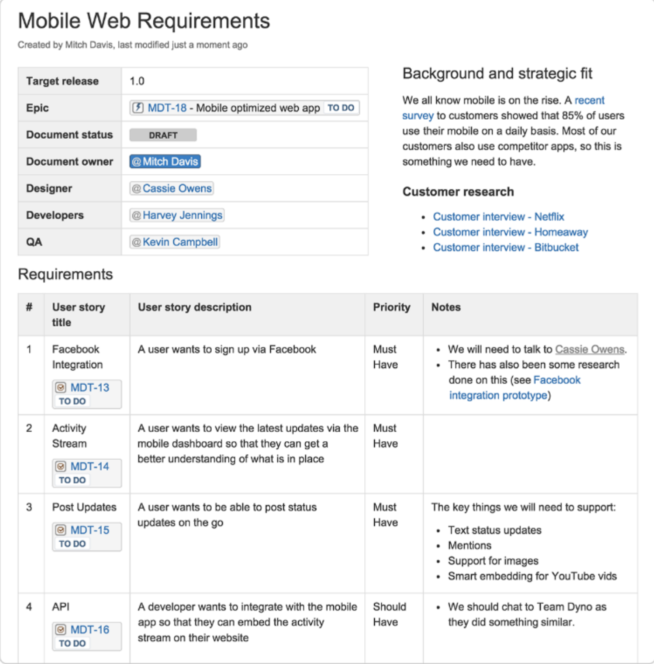
2) Team goals and business objectives

3) User Stories List or link to the user stories involved

4) User interaction and design After the team fleshes out the solution for each user story, link design explorations and wireframes to the page.

5) Questions Create a table of "things we need to decide or research" to track these items.

6) What we're not doing



Mobile Web Requirements

Created by Mitch Davis, last modified just a moment ago

Target release	1.0
Epic	MDT-18 - Mobile optimized web app TO DO
Document status	DRAFT
Document owner	@Mitch Davis
Designer	@Cassie Owens
Developers	@Harvey Jennings
QA	@Kevin Campbell

Background and strategic fit

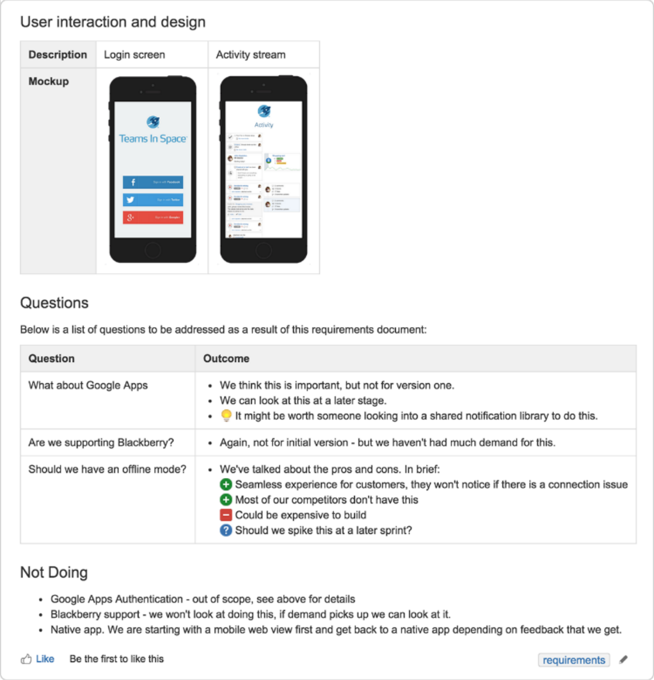
We all know mobile is on the rise. A recent survey to customers showed that 85% of users use their mobile on a daily basis. Most of our customers also use competitor apps, so this is something we need to have.

Customer research

- Customer interview - Netflix
- Customer interview - Homeaway
- Customer interview - Bitbucket

Requirements

#	User story title	User story description	Priority	Notes
1	Facebook Integration MDT-13 TO DO	A user wants to sign up via Facebook	Must Have	• We will need to talk to Cassie Owens. • There has also been some research done on this (see Facebook integration prototype)
2	Activity Stream MDT-14 TO DO	A user wants to view the latest updates via the mobile dashboard so that they can get a better understanding of what is in place	Must Have	
3	Post Updates MDT-15 TO DO	A user wants to be able to post status updates on the go	Must Have	The key things we will need to support: • Text status updates • Mentions • Support for images • Smart embedding for YouTube vids
4	API MDT-16 TO DO	A developer wants to integrate with the mobile app so that they can embed the activity stream on their website	Should Have	• We should chat to Team Dyno as they did something similar.



User interaction and design

Description	Login screen	Activity stream
Mockup	Teams In Space	Activity

Questions

Below is a list of questions to be addressed as a result of this requirements document:

Question	Outcome
What about Google Apps	• We think this is important, but not for version one. • We can look at this at a later stage. • It might be worth someone looking into a shared notification library to do this.
Are we supporting Blackberry?	• Again, not for initial version - but we haven't had much demand for this.
Should we have an offline mode?	• We've talked about the pros and cons. In brief: + Seamless experience for customers, they won't notice if there is a connection issue + Most of our competitors don't have this − Could be expensive to build ? Should we spike this at a later sprint?

Not Doing

- Google Apps Authentication - out of scope, see above for details
- Blackberry support - we won't look at doing this, if demand picks up we can look at it.
- Native app. We are starting with a mobile web view first and get back to a native app depending on feedback that we get.

Like Be the first to like this requirements

Procurement Plan

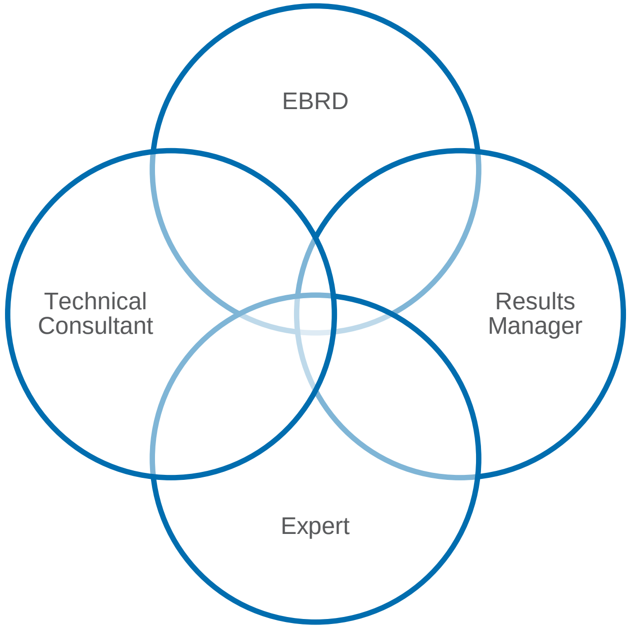
A procurement plan

1) Described how the scope what the Bank will do itself and what should be contracted.

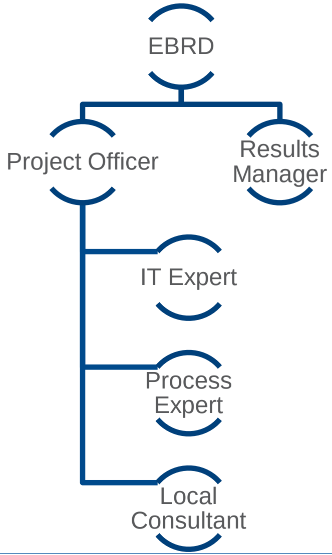
2) Describe how the scope is divided between the different consultants to minimise risk.

3) Describe the best contractual relationships e.g. prime or alliance.

4) Describe the payment and invoicing mechanisms and reporting requirements, e.g. milestone or time and materials.



Divide the scope between the different parties



Describe the contractual relationships

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End of phase checklist

Mandatory TC development outputs

- [ ] Finalised Terms of Reference/s
- [ ] Final Estimated Budget/s
- [ ] Procurement Plan
- [ ] Policy Plan
- [ ] To-be governance model in BPMN
- [ ] Technical concept for implementation tools

Optional deliverables

- [ ] Road map for complex/phased/long-term TC

03 TC implementation – Pilot

This is a critical phase in which the changes to policy, process and information management systems are brought together to prove that the reform concept is realistic and practicable.

Policy path – Legislative drafting

During this phase, a draft law or amendments to the law will be developed e.g. primary, secondary or tertiary legislation.

Process path – Process reengineering activities

In this phase, a detail level 5 Business Process Model Notation (BPMN) diagram is produced and process change implemented in the regulatory areas selected for pilot. This forms the basis of a formal change management plan and internal training of the key users policy users as well as all parties involved in the pilot.

Tools path – Proof of concept pilot

Prototype digital tools are piloted in the selected regulatory areas to prove the reform concept is viable for local environment. The result may be a pilot evaluation report, providing inputs for commissioning digital tools or a pre-commissioning version of the software for further development.

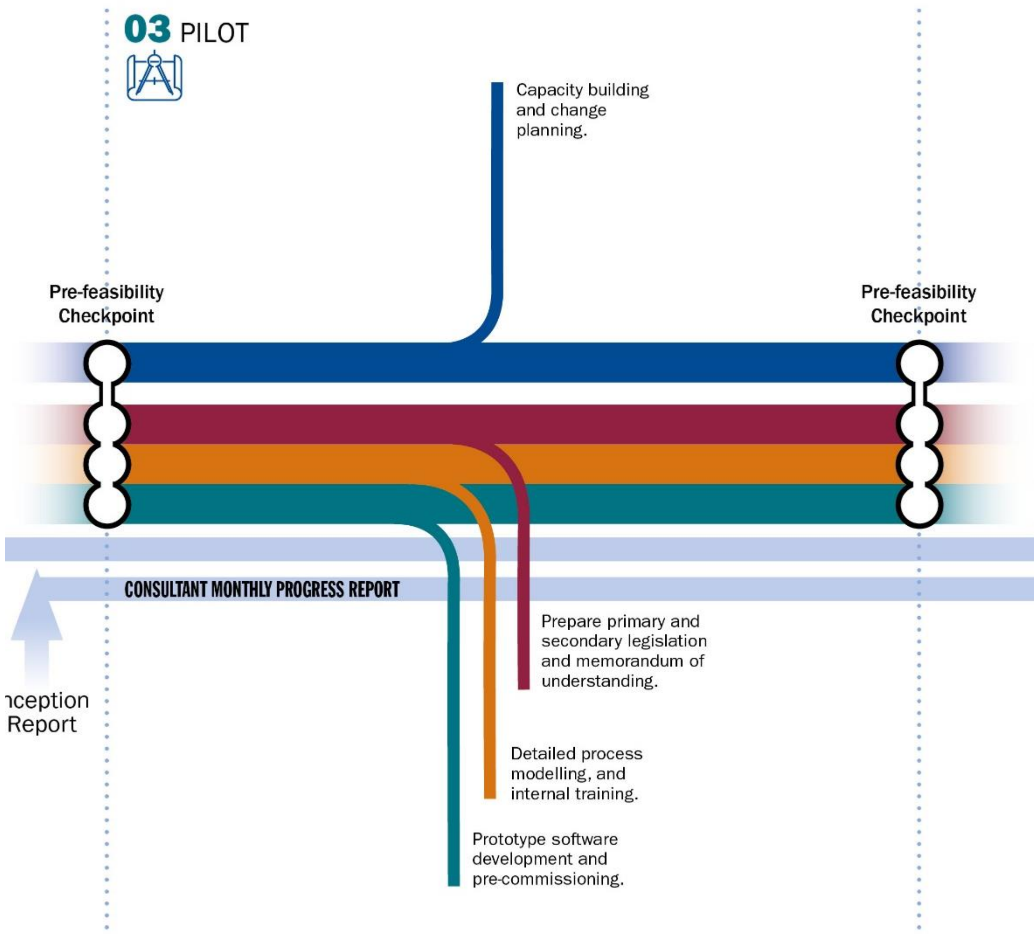
End of phase checklist

Mandatory deliverables if in the scope of the project

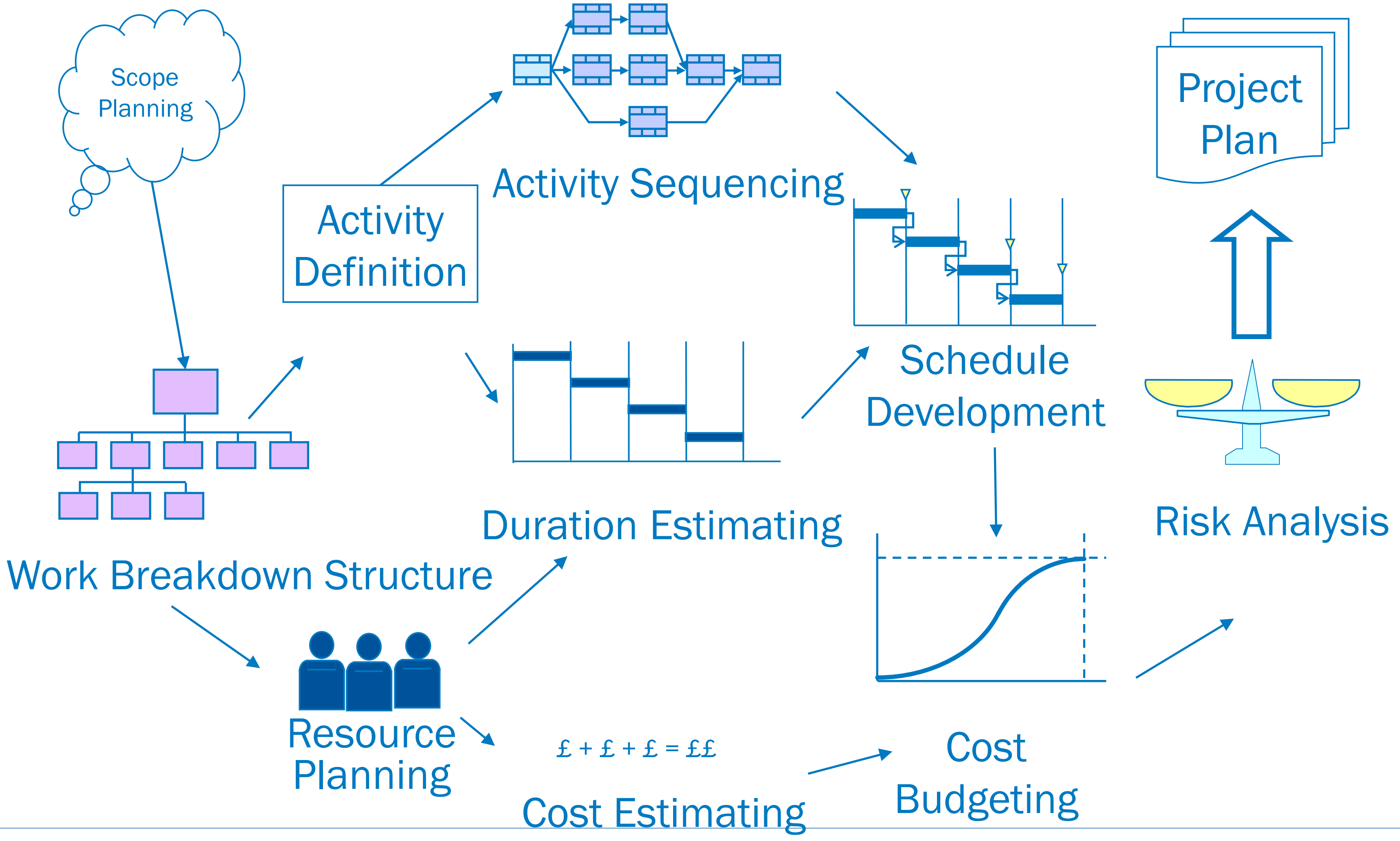
- [ ] Pilot implementation plan (legal, business and technology)
- [ ] Draft legislation
- [ ] Detailed BPMN process map
- [ ] Stakeholder engagement plan
- [ ] Plan evaluation report including lessons learned

Optional deliverables

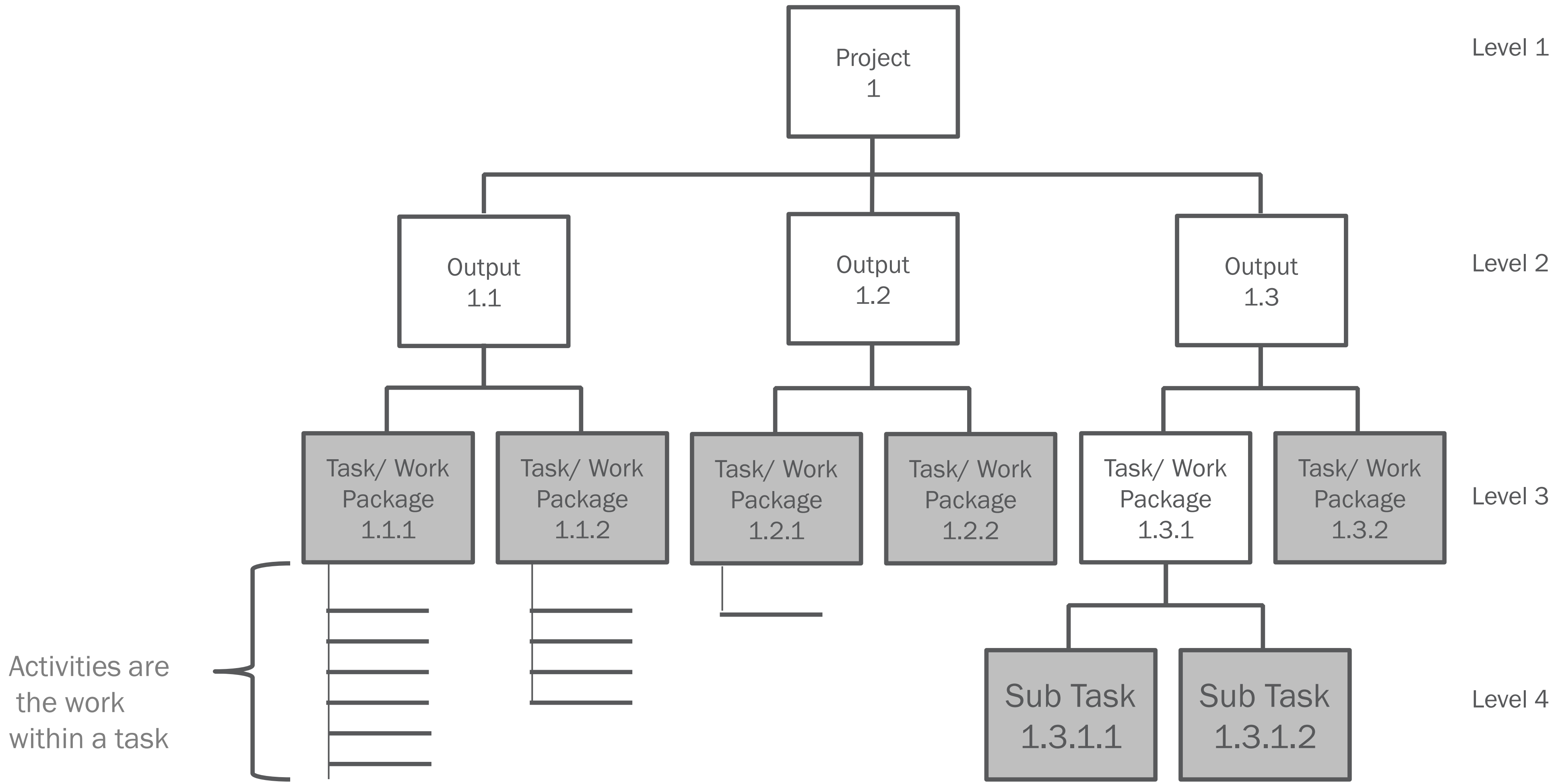
- [ ] Awareness raising and/or outreach campaign



Agree a Plan of Work



Work breakdown structure



In this case, the shaded boxes indicate the work packages which can contain multiple activities, activities use inputs such resources and money to produce a deliverable.

Work Packages

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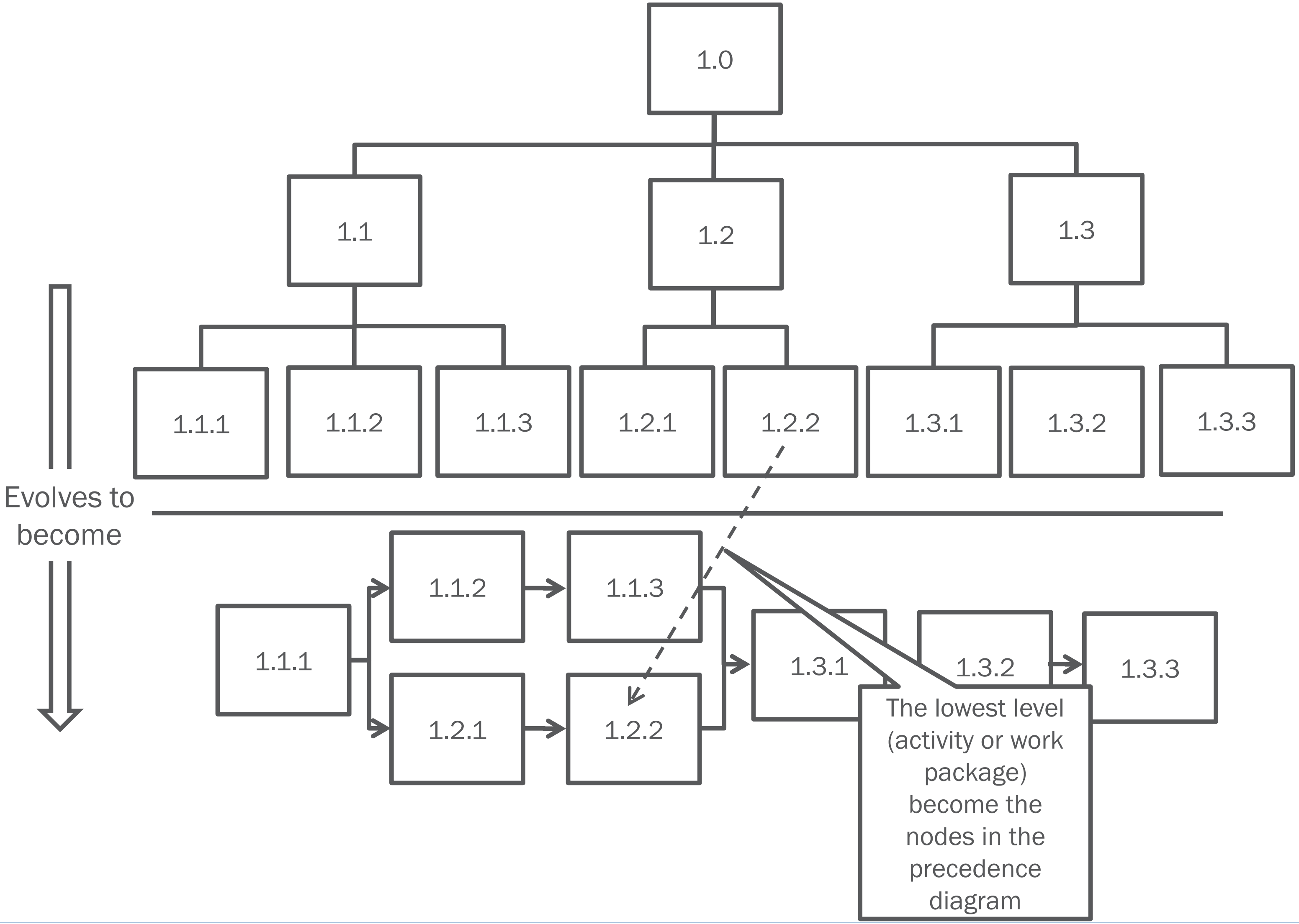
The lowest level of planning

- Be assignable to a single “owner”
- Be distinguishable from other work packages
- Be a discrete entity in the network
- Have an associated product
- Becomes an entry into the project accounts

WBS to precedence diagram



Gantt chart

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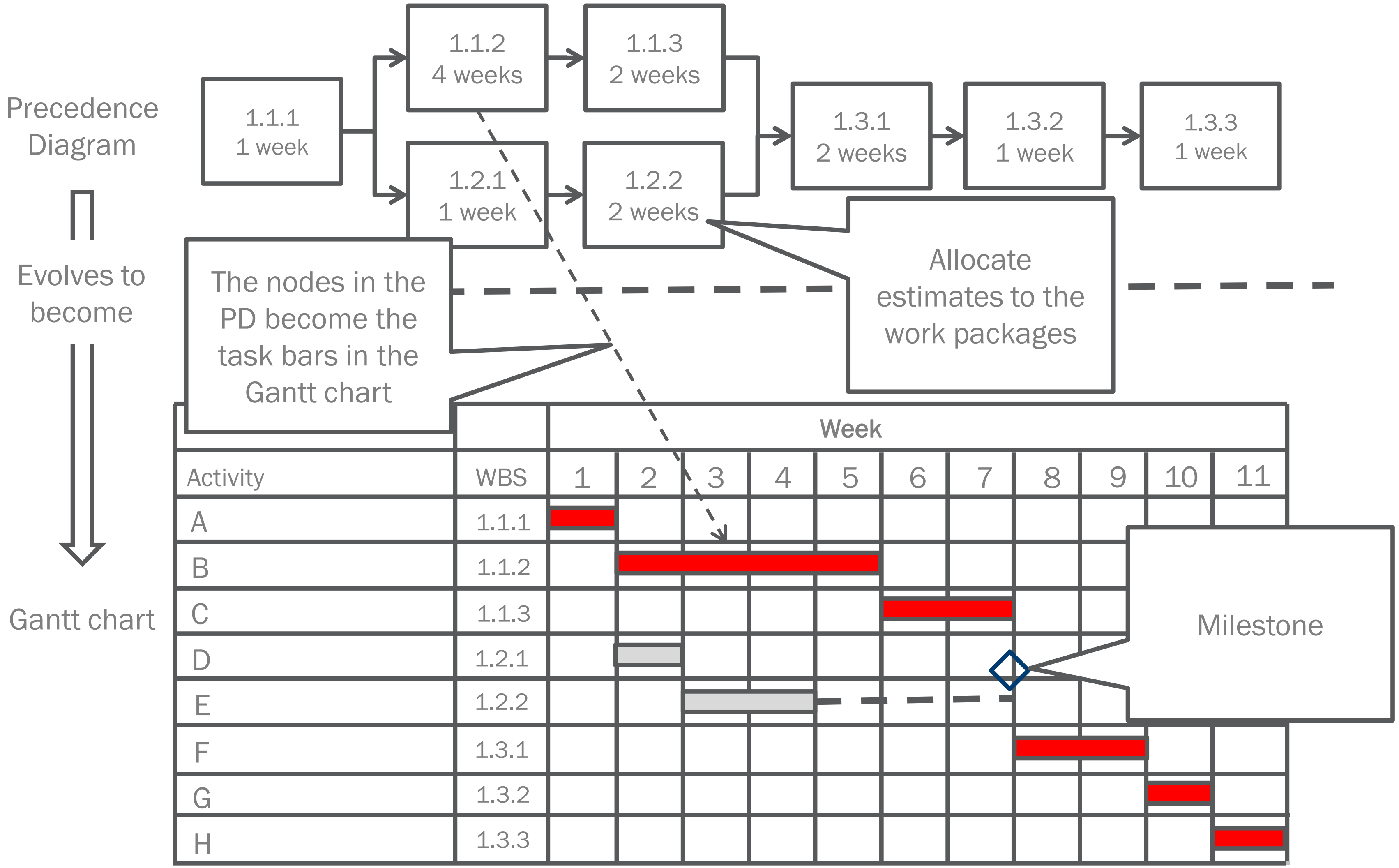

Resource Smoothing – assuming only 2 Y's

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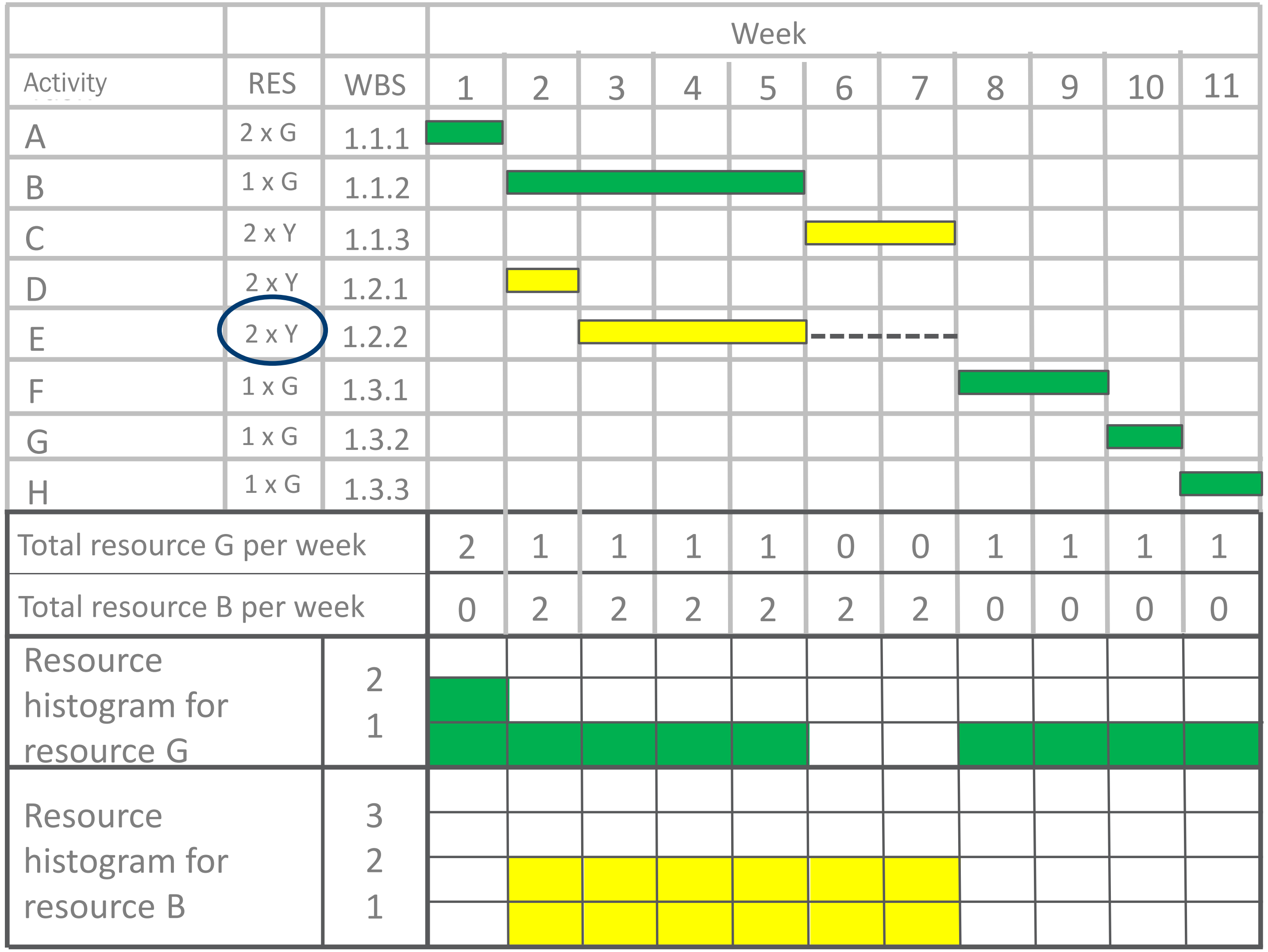

Project Baseline

Baseline is the value or condition against which all future measurements will be compared. The baseline is a point of reference. In project management there are three baselines – schedule baseline, cost baseline and scope baseline.

Risk – a definition

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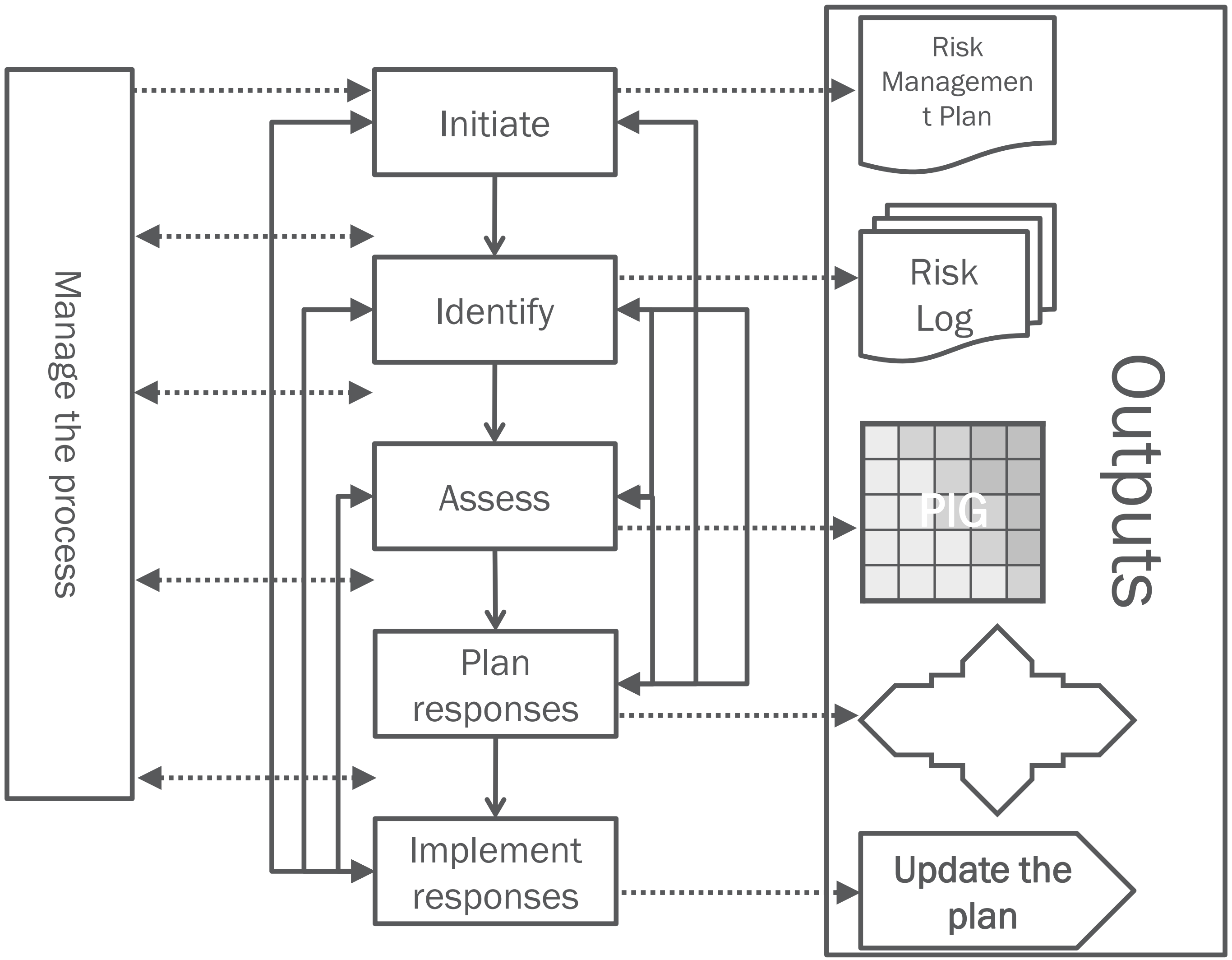
What might go wrong?

An event that – should it occur will have an effect on the successful achievement of the project outputs, outcomes or benefits.

Risk management process



Probability Impact Grid

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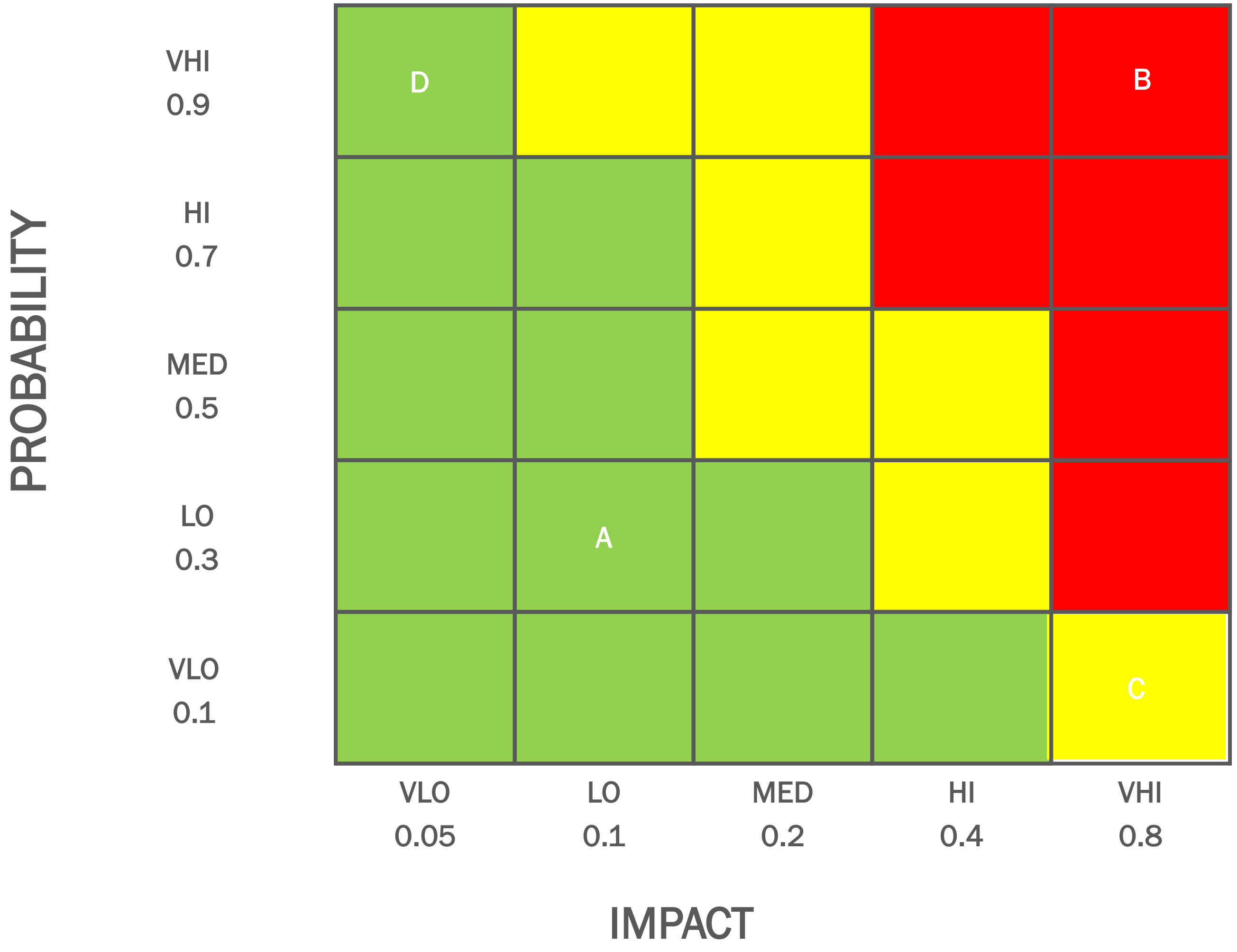

What is the Inception Report?

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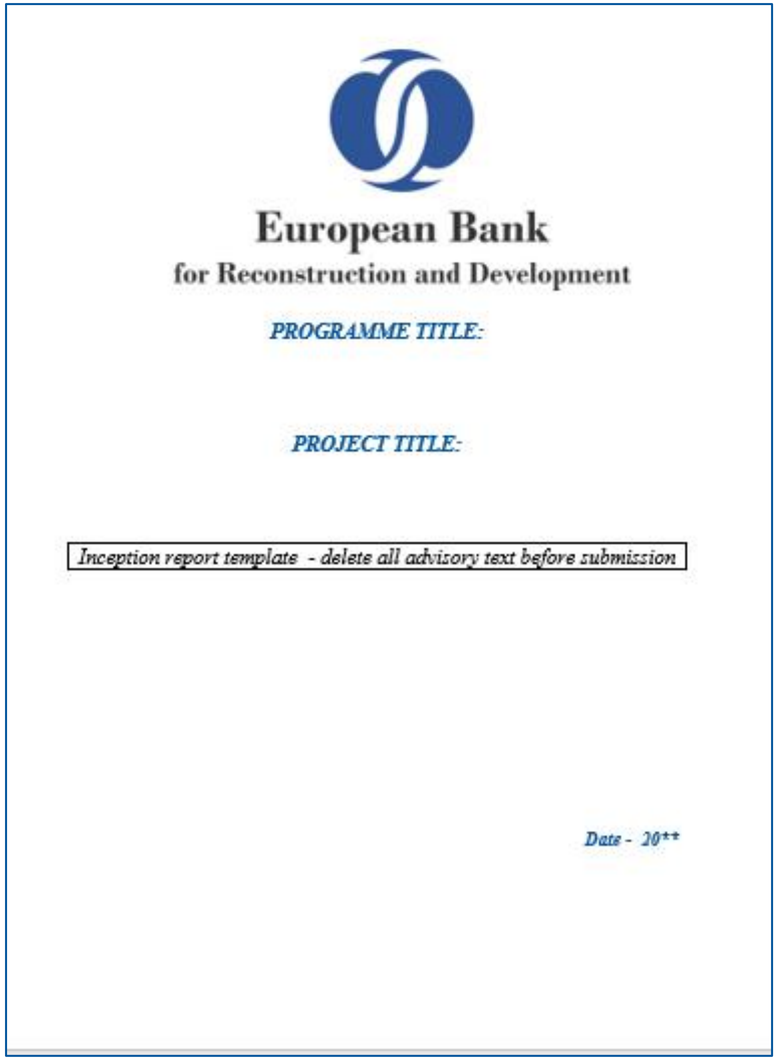
- It's the project plan that refines the TC Consultants technical proposal and defines the scope, methodology and workplan activities that will be undertaken by the TC Consultant to deliver the outcomes and outputs of the project.
- It must be promptly prepared by the Consultant and approved by the OL and Results Manager of the Bank
- The contents must be aligned with, and cross-refer to, the TORs of the assignment and the results matrix.
- Monthly reports to the OL must cross-refer to the Inception Report workplan.


European Bank
for Reconstruction and Development

PROGRAMME TITLE:

PROJECT TITLE:

Inception report template - delete all advisory text before submission

*Date - 20***

Preparation of the Inception Report (new template available)

European Bank
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- Baseline locks down the project scope, approach and budget.
- Essential step in foundation for successful delivery.
- Convert the contract into a delivery plan.

Inception Report EBRD TC Project (Minimum Contents)	
Document approval table	
✓ Introduction ✓ Document objective ✓ Programme background ✓ Project background ✓ Objectives and Scope of the TC Assignment ✓ Summary of provisional terms of reference and result matrix ✓ Description of problem to resolve – (baseline) ✓ Expected project outcomes ✓ List of tasks and deliverables	✓ Revised result matrix with quantitative indicators ✓ Detailed budget ✓ Work plan and schedule ✓ Experts' roles and responsibilities ✓ Project mission plan and man-days allocation to specific deliverables ✓ Identified risks and tasks ✓ Project reporting
✓ Annex 1 Detailed Terms of Reference ✓ Annex 2 Copy of project results matrix	

3 key reports to be prepared by the Consultants (templates available)

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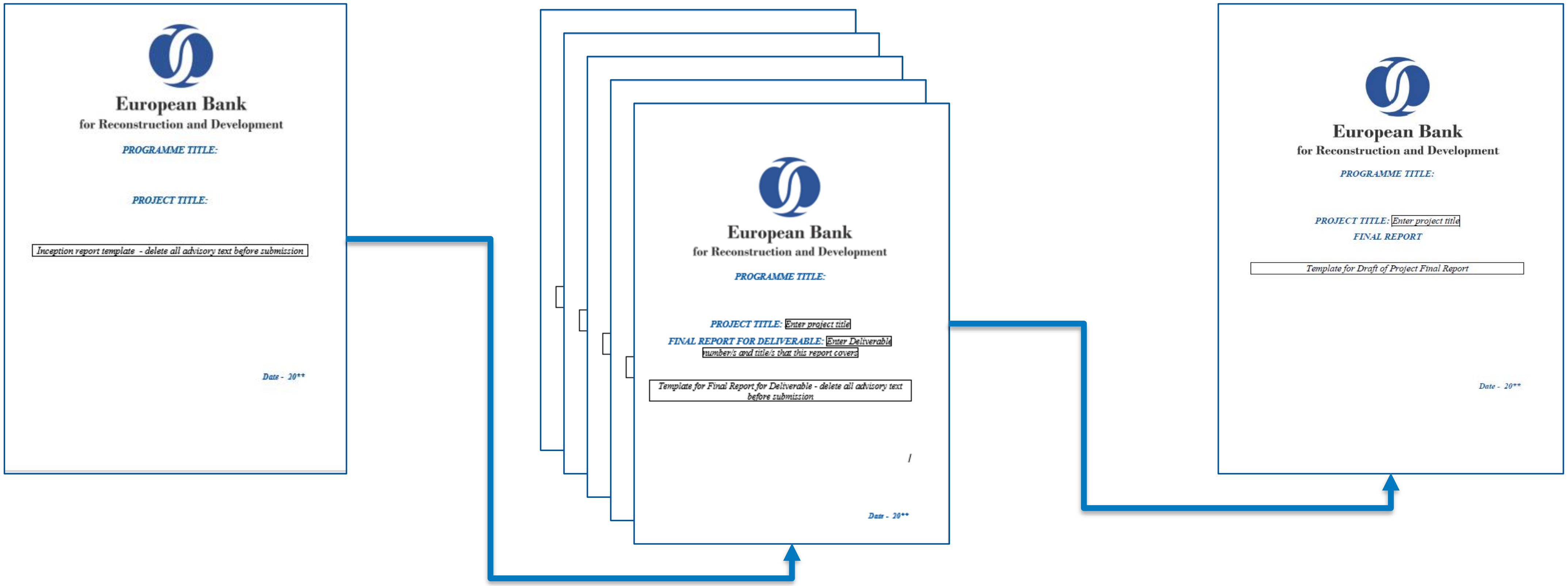
1. INCEPTION REPORT

2. FINAL DELIVERABLE REPORTS

3. FINAL REPORT



What is a Final Report for a Deliverable?

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A Final Report for a Deliverable or group of deliverables as listed in the assignment Terms of Reference.

Should be prepared once a deliverable and the Consultant's associated tasks and activities have been completed to the satisfaction of the Bank and the beneficiary government.

It can cover for example:

1. A technical report on a review of a legal framework with recommendations for updating it;

2. Development and acceptance of a piece of software e.g. dashboard reporting tool;

3. Delivery of a training programme.


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PROGRAMME TITLE:

PROJECT TITLE: Enter project title

FINAL REPORT FOR DELIVERABLE: Enter Deliverable number/s and title/s that this report covers

Template for Final Report for Deliverable - delete all advisory text before submission

Date - 20**

Preparation of the Final Report for a Deliverable (new template available)

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The report should provide a succinct summary of the tasks and activities undertaken by the Consultant for a Deliverable and should be written to be read by both EBRD and the beneficiary government and be aligned with the methodology and content of the Project Inception Report.

Lessons learned should be excluded from this report and should be included in the Project Completion Report.

Final Report for a Deliverable EBRD TC Project (Minimum Contents)	
Document approval table	
✓ Introduction ✓ Document objective ✓ Program and project background ✓ Summary of activities performed ✓ Deliverable completed ✓ Task, activities and deliverable summary ✓ Commentary on the completion of the deliverable ✓ Deliverable implementation schedule ✓ Missions completed ✓ Issues and challenges encountered ✓ Utilization of TC project budget	✓ Project results matrix ✓ Expected project outputs ✓ Expected project outcomes ✓ Conclusion
✓ Annex 1 – include copy of any training materials. ✓ Annex 2	

What is a Final Report for a Project?

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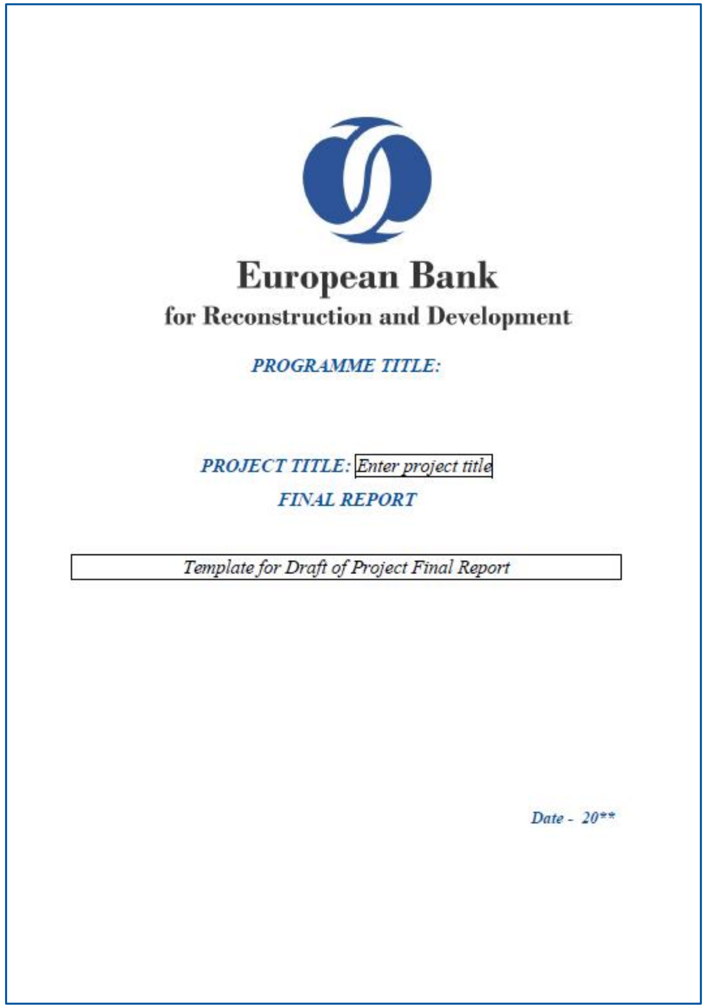
A Final Report should only be prepared once all tasks, activities and deliverables required under the project terms of reference have been completed and a Final Report for each Deliverable has been approved by the OL and the beneficiary in writing.

The contents must be aligned with, and cross-refer to, the TORs of the assignment and the results matrix.

It must be promptly prepared by the Consultant , once all Final Report for each Deliverable have been prepared, and then approved by the OL and Results Manager of the Bank


European Bank
for Reconstruction and Development

PROGRAMME TITLE:

PROJECT TITLE: *Enter project title*

FINAL REPORT

Template for Draft of Project Final Report

*Date - 20***

Preparation of the Final Report for a Project (new template available)

European Bank
for Reconstruction and Development

The Final Report should provide a succinct summary of the tasks and activities undertaken by the Consultant on the project and should be written to be read by both EBRD and the beneficiary government and be aligned with the methodology and content of the Project Inception Report and the Deliverable Reports

Lessons learned should be included in the Final Report.

Final Report for an EBRD TC Project (Minimum Contents)	
Document approval table	

✓ Introduction
✓ Document objective
✓ Program and TC Project/TC Assignment background
✓ Summary of TC activities performed
✓ Deliverable
    ✓ Commentary on the completion of the deliverable
    ✓ Deliverable implementation schedule
	✓ Project missions completed
	✓ Assumptions, issues and risks
	✓ Lessons learned
	✓ Conclusion

Annex 1 - Copy of Final Version of Terms of Reference Annex 2	

Mobilise the project team

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- Plan the mobilisation phase, critical first 60 days.
- Launch project kickoff meeting.
- Establish project control systems.
- Allocate budget to account managers.
- Establish project facilities and infrastructure.
- Brief and train staff.

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End of phase checklist

Mandatory deliverables if in the scope of the project

- [ ] Pilot plan and report (Legal, Business and Technology)
- [ ] Draft legislation
- [ ] Detailed BPMN process map
- [ ] Stakeholder engagement plan
- [ ] Pilot evaluation report including lessons learned

Optional deliverables

- [ ] Awareness raising and/or outreach media campaign

04 TC implementation – Rollout

During the rollout, the new policy, process and implementation tools are launched as mandatory for all policy users.

Policy path – Regulatory capacity building

During this phase, the new legislation is enacted. This will be supported by the publication of guidance notes. Regulatory capacity building with the regulatory authority is finalised.

Process path – Change management

The process implementation activities will be accelerated and introduced to all relevant government departments. These will include training and on-going help desk support.

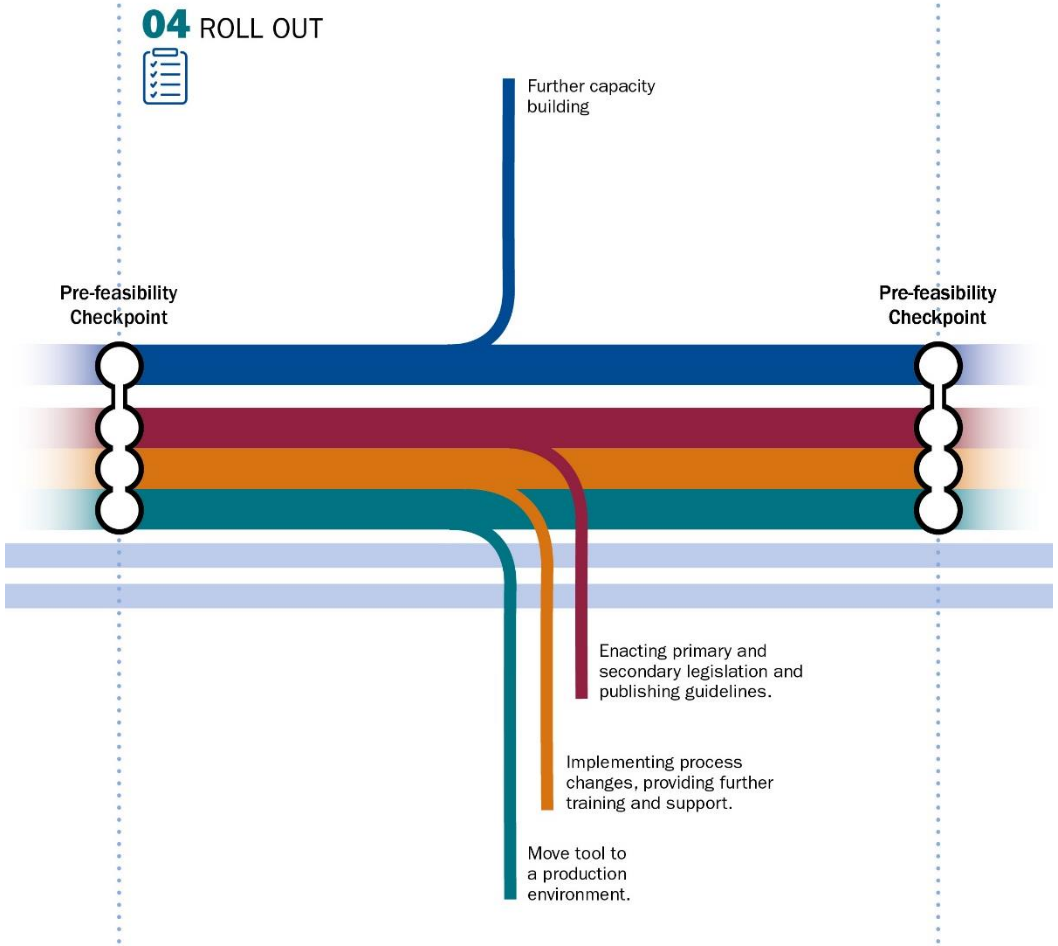
Tools path – Development of tools

During this phase the digital tools are commissioned by the Beneficiary. If pre-commissioning pilot implementation is provided by the TC, the digital tools are transferred from the pilot infrastructure to the government production environment.

End of phase checklist

Mandatory deliverables if in the scope of the project

- [ ] Final legislation (primary and secondary)
- [ ] Guidance notes
- [ ] Government users – capacity building curriculum and materials:
  1. Training for key users.
  2. Training for standard users.
  3. Outreach for non-governmental stakeholders.
- [ ] Final governance process maps in BPMN



05 Handover

This TC phase happens in parallel with the rollout. During Handover the TC Project team transfers all the knowledge and operational documentation to the responsible units at the Beneficiary.

Policy path

Additional regulatory capacity building and development of online FAQs may be required during this phase.

Process path

Handover of detailed process maps in a format that the beneficiary can use for future support and changes.

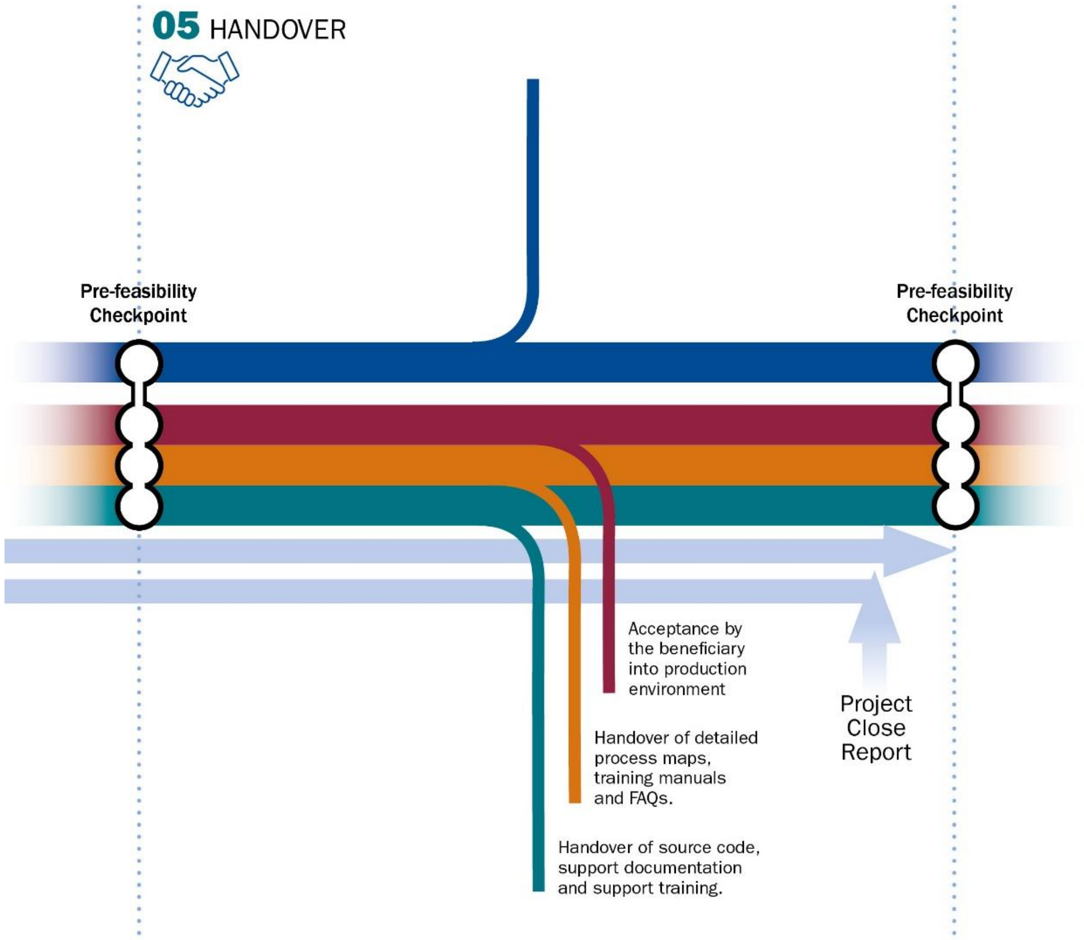
Tools path

Handover of technical documentation, help desk guidance and pilot release notes. This will include licensing agreements, finalising technical documentation and arranging for digital tools administration, maintenance and development by the Beneficiary's Technical Owners.

End of phase checklist

Mandatory deliverables if in the scope of the project

- [ ] Training of trainers training materials
- [ ] Detailed governance process maps in the Beneficiary format
- [ ] Online help-desk:
  a) Software
  b) Procedures
  c) Regulations
- [ ] Final digital tools technical documentation and licensing agreements



06 Evaluation

Evaluation happens between 6 to 12 months after Handover.

Policy path

Legal gap analysis or benchmarking.

Process path

Audit of processes for efficiency, compliance and effectiveness.

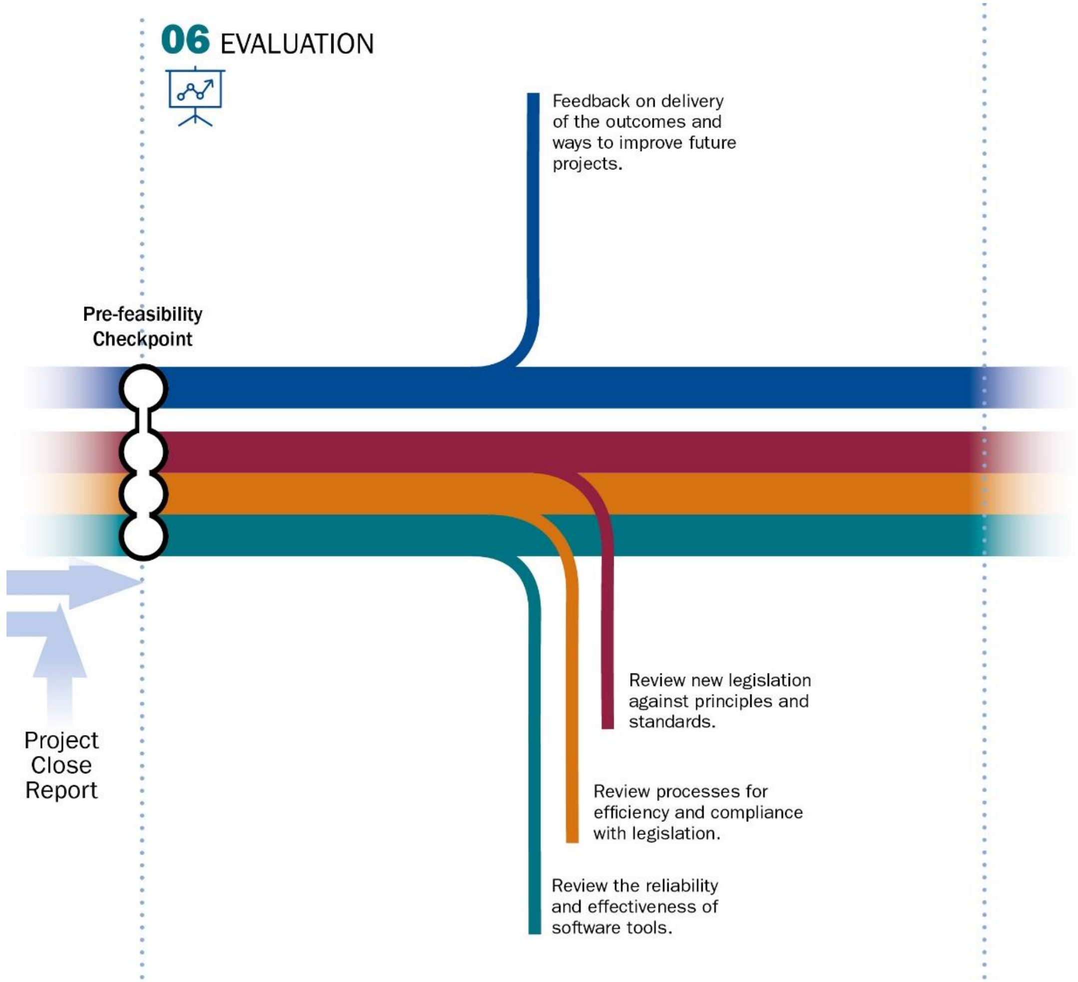
Tools path

Audit of digital tools against technical and functional specifications, in case of pre-commissioning pilot implementation.

End of phase checklist

Mandatory TC development outputs

- [ ] 6-month evaluation/audit report
- [ ] 12-month evaluation/audit report



Supporting processes

Procurement

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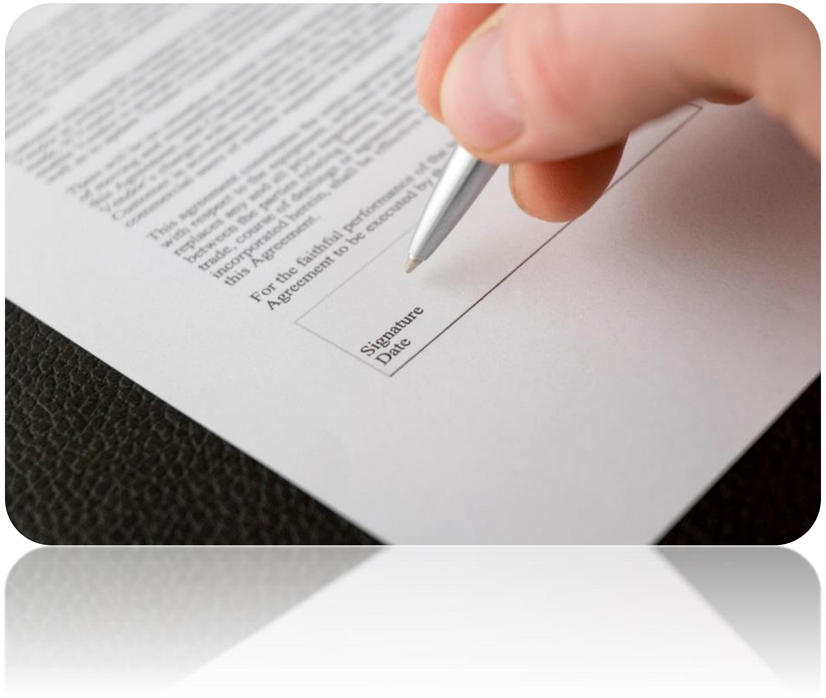
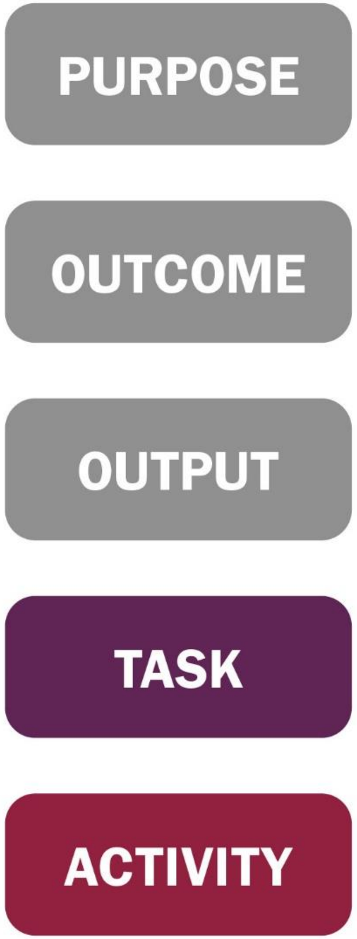
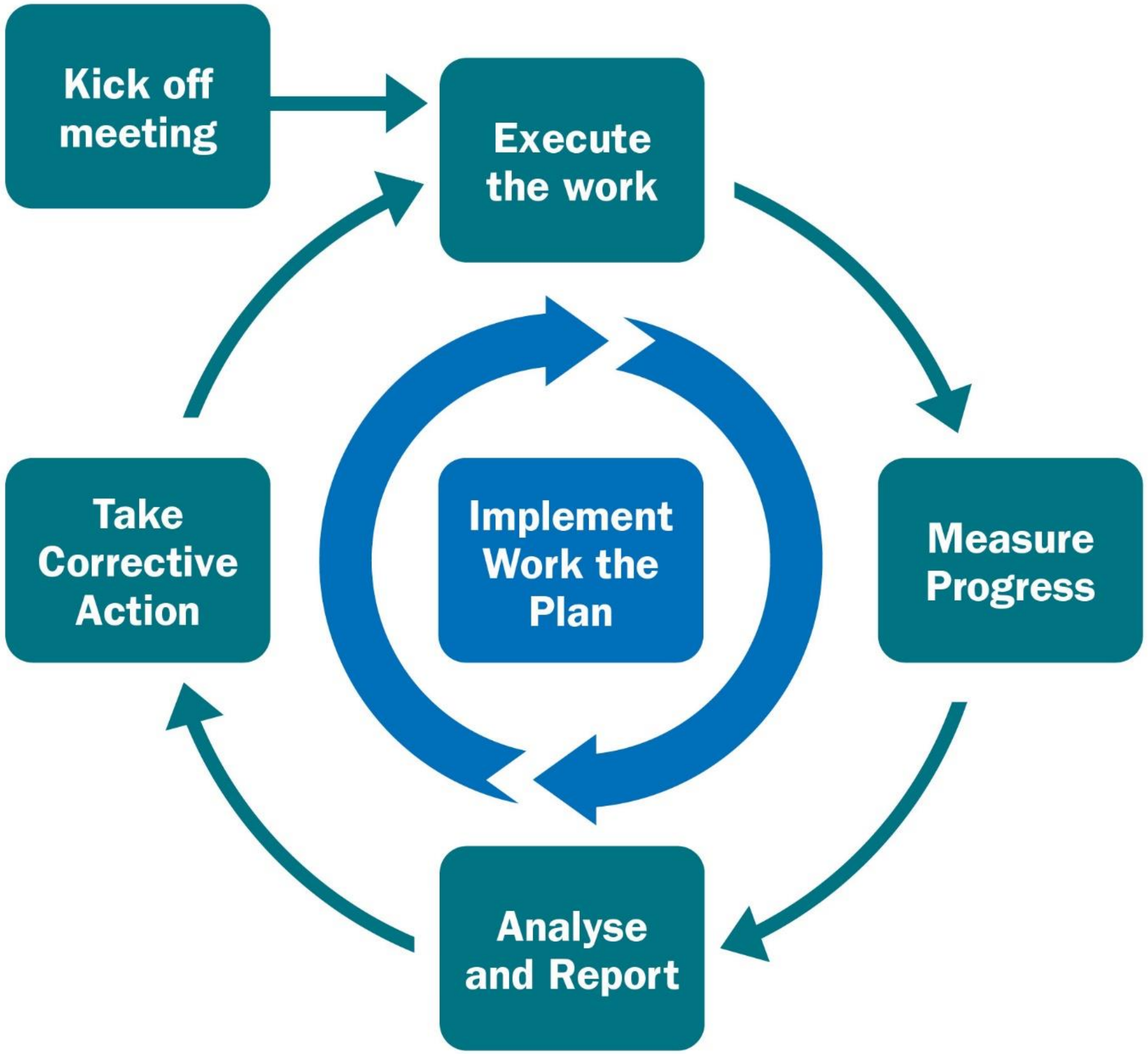
Procurement is a process which results in a clearly defined contract being placed with the Key Experts, Technical Consultants, Project Officers and Results Managers and the on-going management of them.

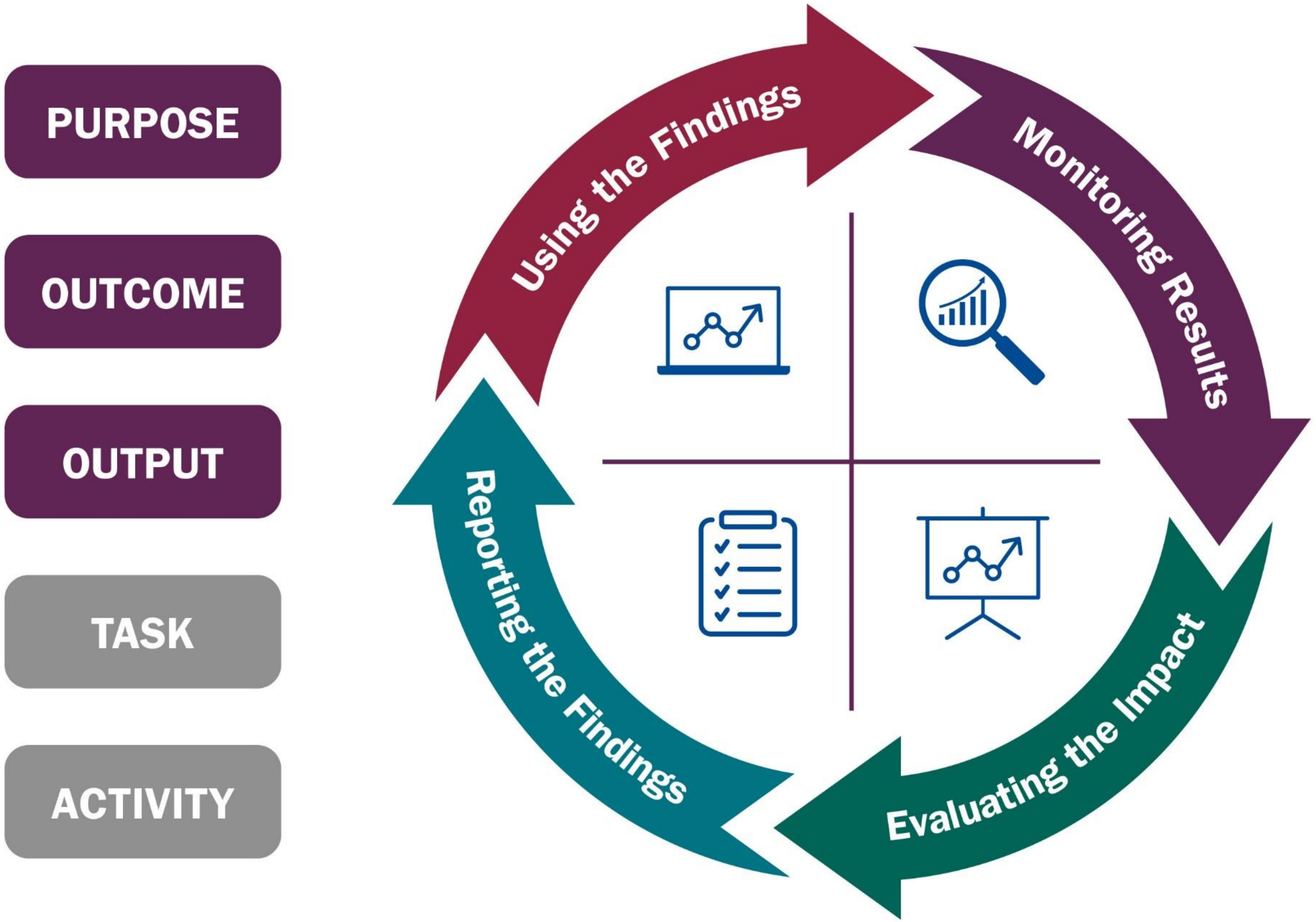


Implementation Monitoring





Implementation Monitoring vs Results Monitoring



Control Changes From the Start

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Identify

Evaluate impact

Customer Approval

Implement

Issue management

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A formal issue occurs when the tolerances of delegated work are predicted to be exceeded or have been exceeded. This triggers the escalation of the issue from one level of management to the next in order to seek a solution.

Issue management process

1. Identify
2. Assess
3. Escalate
4. Resolve

Information management

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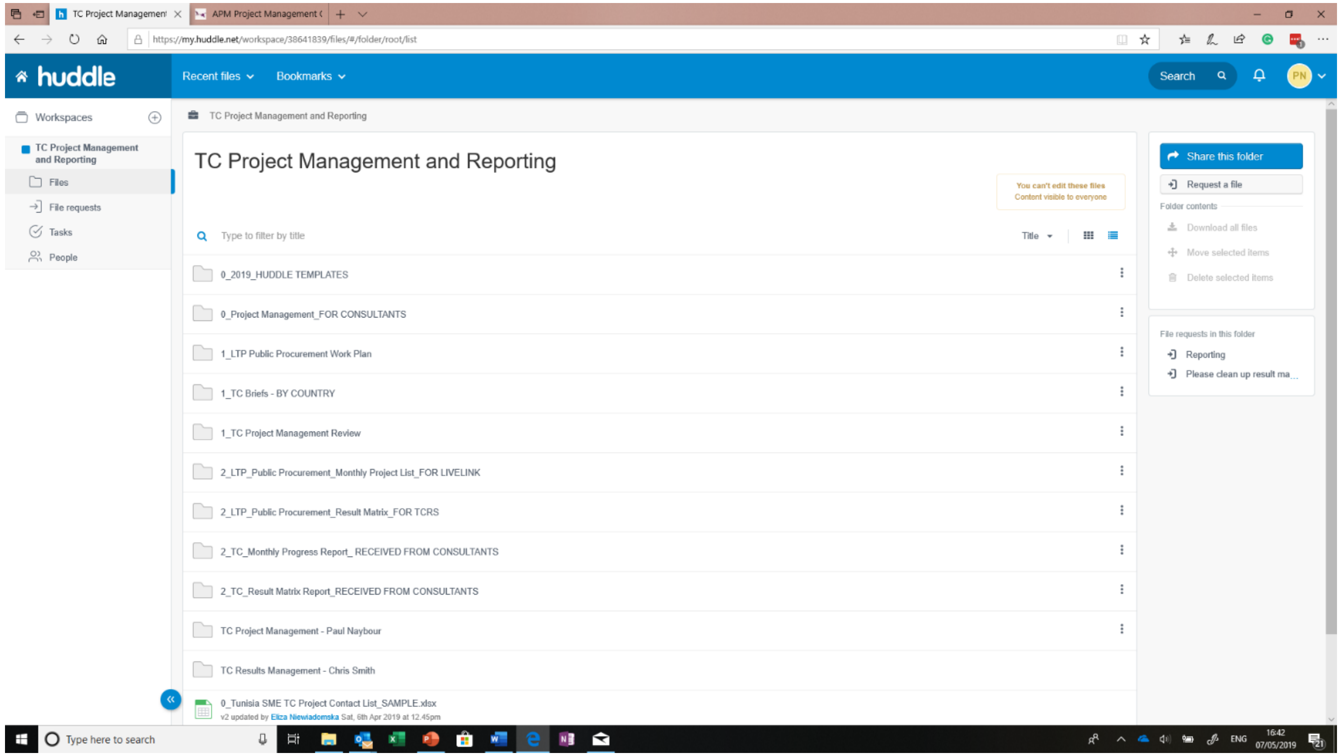
- Planning
- Collection
- Storage
- Archival
- Dissemination
- Destruction
- Reporting



https://huddle.zendesk.com/hc/en-us/sections/204809788-Beginners

Online Huddle help

Huddle folder structure template

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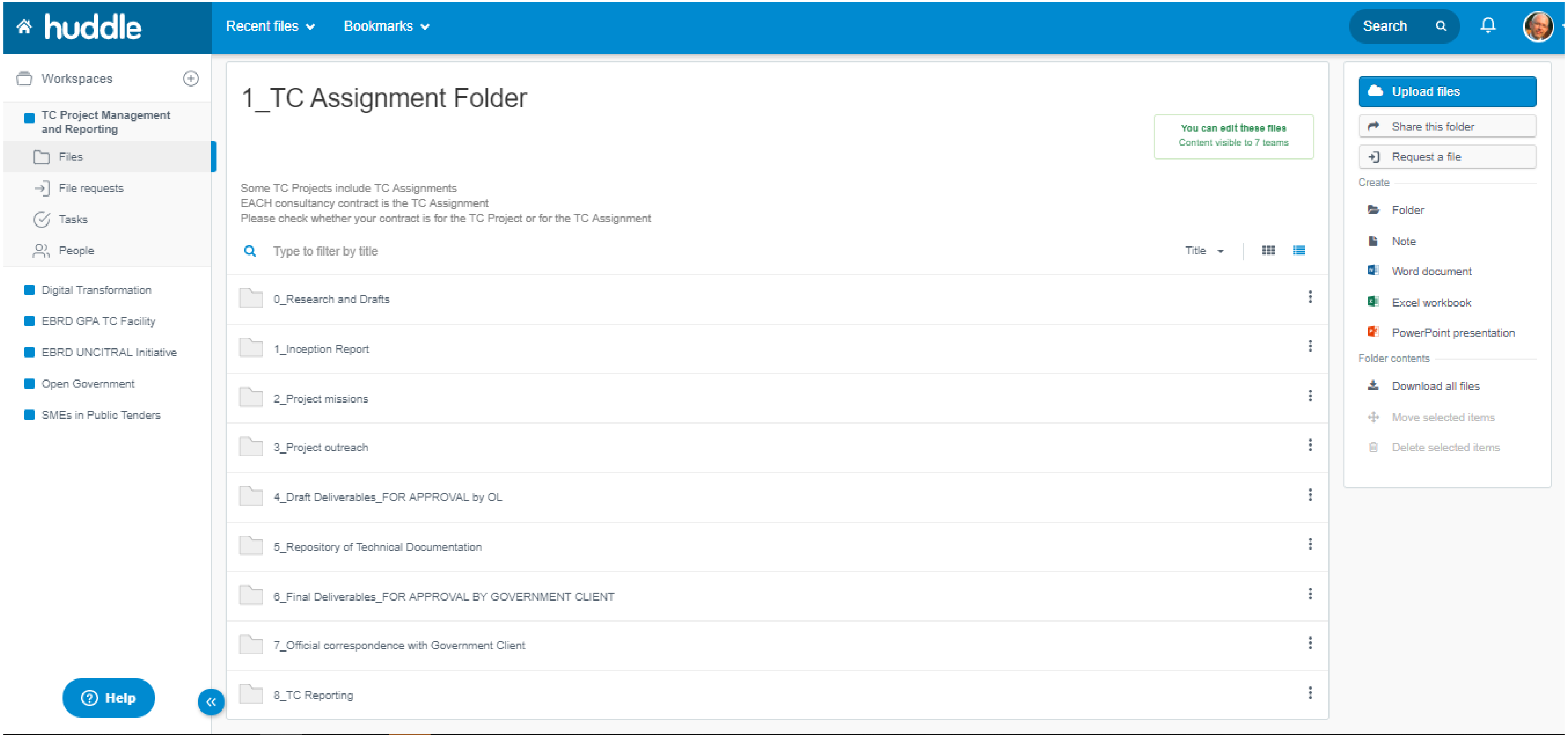

Stages in Huddle Document Management

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Work in Progress

- Draft documents
- Posted for input from other users including OL on Huddle.
- Meaningful file names and version numbers

e.g. v0.1 or v1.1

Documents for Approval

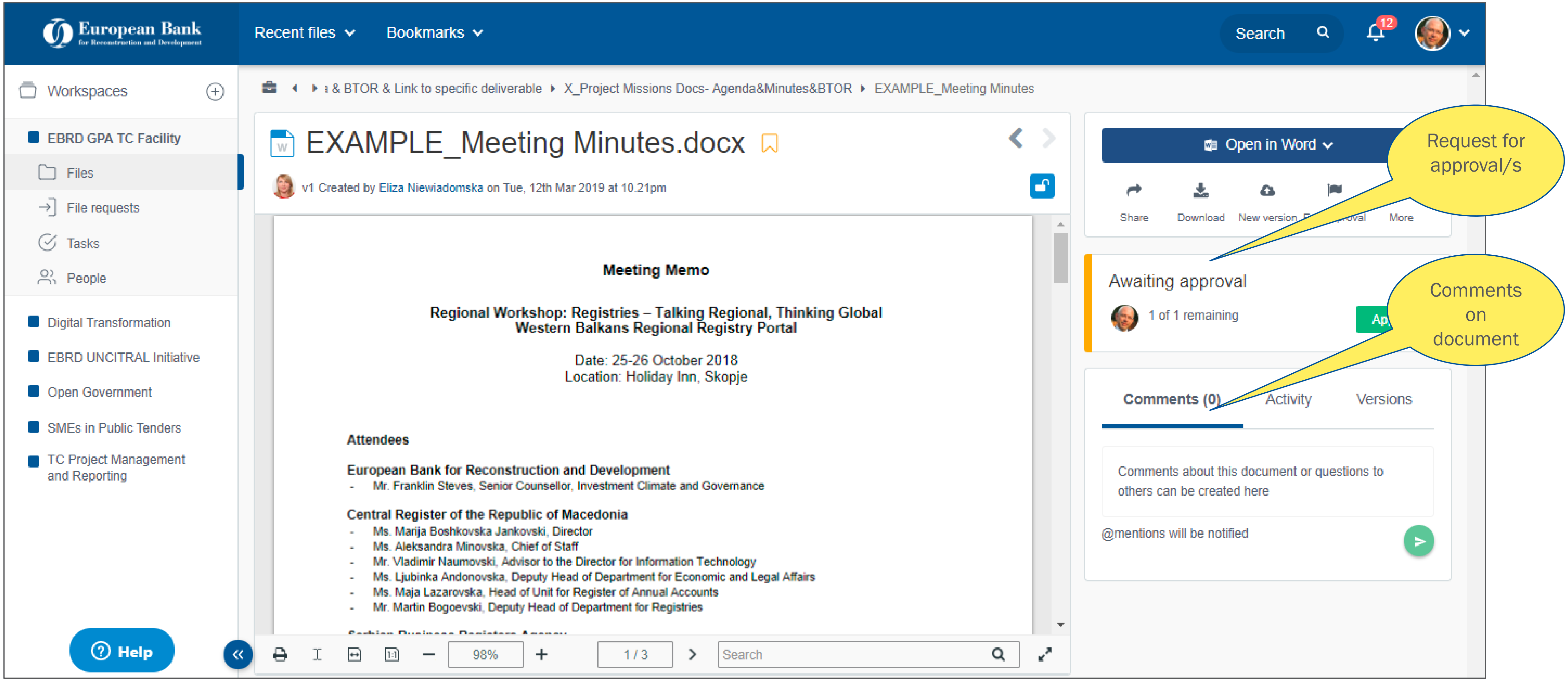
- Completed documents submitted for approval on Huddle by the OL
- May result in formal comments that need to be addressed before approval.
- Use tracked changes and office comments until final version approved.

Published/ Approved Documents

- Approved for release by the OL on Huddle.
- Should not be changed but replaced by new version.

e.g. v1.0 or v2.1

Huddle workflow approval and commenting tools



3. A. Breeze.pm – Rules

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- ✓ **Use Breeze.pm for project management and monitoring**
- ✓ **Do Not Send Breeze.pm for document *storage* and *collaboration***
- ✓ **This should be done on Huddle**

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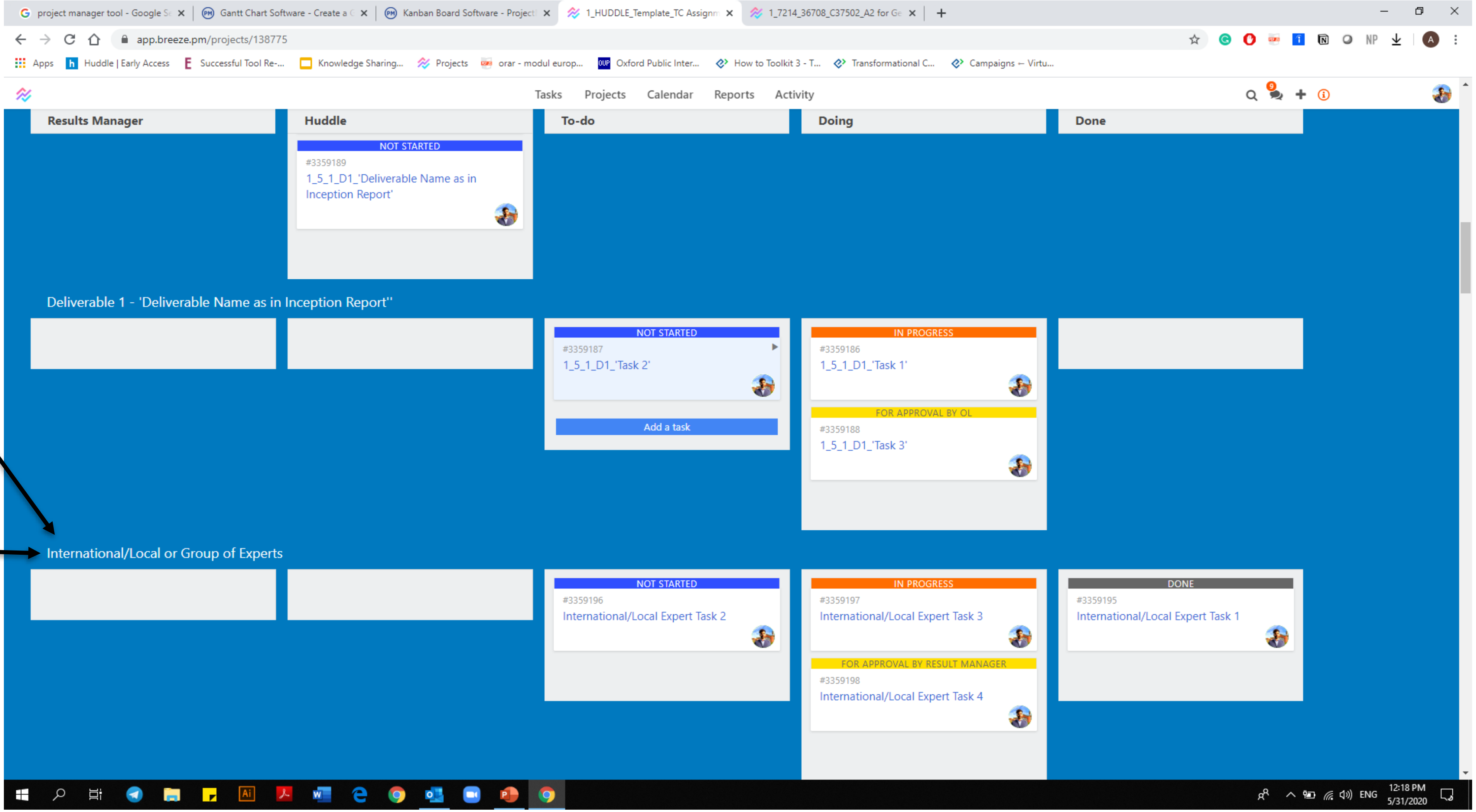
Planning in Breeze.pm

Consultant can add a swimlane for an expert to better detail their tasks.

Consultant can add a swimlane for a group of experts if they are working together



How to Create a Task in Breeze.pm

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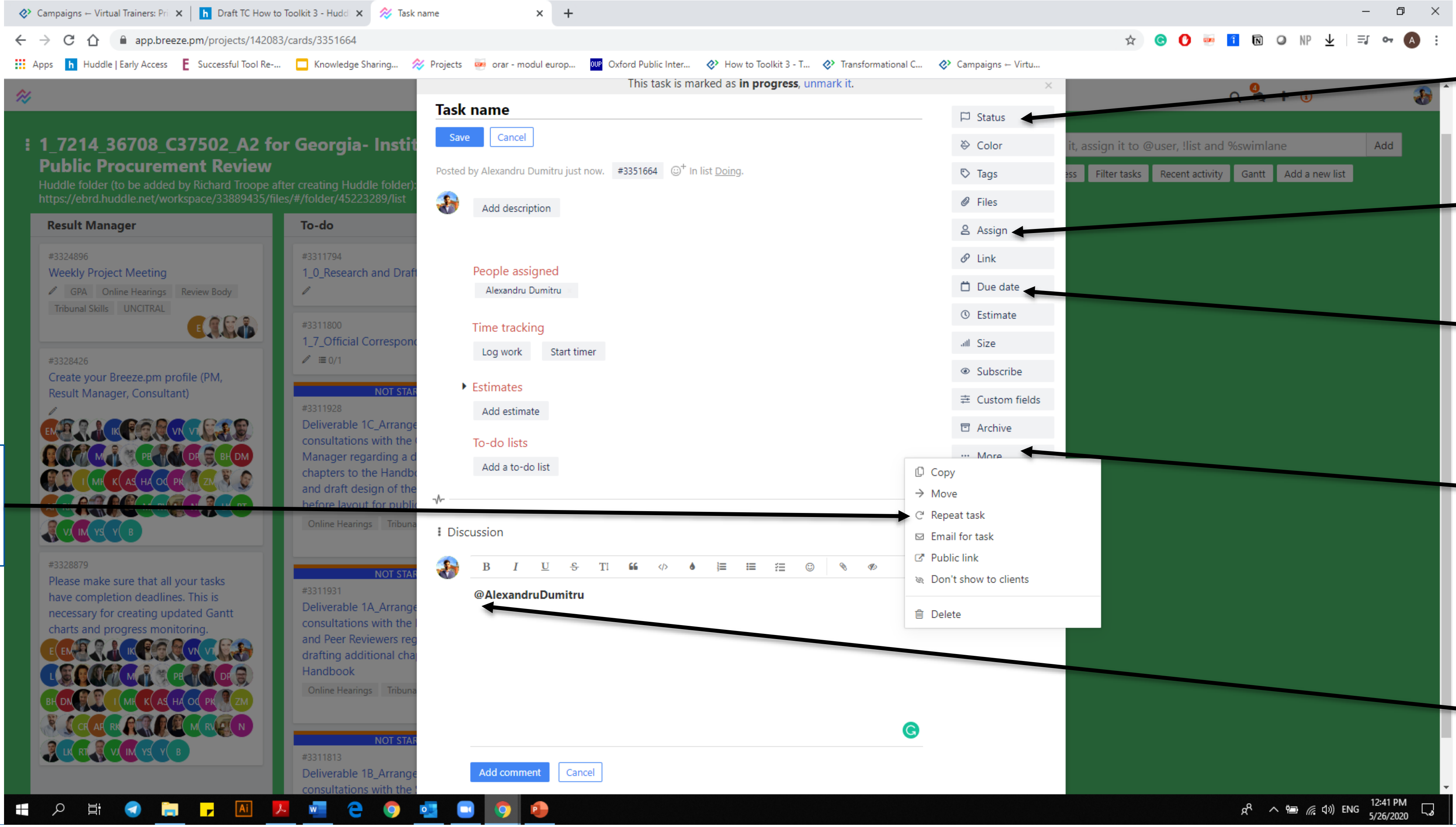

Use *Status* function to mark up the corresponding status

Use *Assign* function to assign task team members

Use *Due date* function to add due dates and target dates to task

Use *More* function to: *Copy* *Move* *Repeat and Delete* a task

Use *Repeat task* to set-up repetitive tasks such as Weekly Project Meeting

Use *Comment* function to raise Issues and Risk and seek clarifications related to your task

Work progress *Statuses*

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a) Rules for marking Statuses in the list *Doing*

- When Consultant has moved the deliverable/task in *Doing* list it has to mark the corresponding status:
  - ***In progress*** – when Consultant starts working on the deliverable/task
  - ***For Approval by Result Manager*** – when the deliverable is sent for approval by RM
  - ***For Approval by OL*** – when the RM has approved your submission
    - ❑ *If the RM does not approve the Consultant's submission, the corresponding status is 'In progress'*
  - ***For Approval by OL*** – when the RM has approved your submission
    - ❑ *If the OL rejects the submission, the corresponding status is 'In progress'*
  - ***For Acceptance by Beneficiary*** – if the deliverable is approved both by the OL and RM and submitted to the Beneficiary's acceptance

Work progress *Statuses*

European Bank
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- ***Overdue*** – if your deliverable/task is overdue
- ***On Hold by OL*** – if the OL notifies the Consultant that the project is on hold
- ***Blocked by Beneficiary*** – if the project is blocked by the Beneficiary
- ***Cancelled*** – if the task activity is canceled.

✓ When your submission receives all the necessary approvals, the deliverable/task can be moved into the *Done* list and marked with the status *Done*

✓ *The aforedescribed procedure should be also followed in the dedicated swimlane for each deliverable/task.*

IV. Reporting in Breeze

Types of reports:

1. Consultant Weekly Progress Report (Done) for RM/OL
2. Consultant Weekly Progress Report (To-do and Doing) for RM/OL
3. Project Officer Weekly progress report for RM/OL
4. Timesheet report for all time-based contracts
5. Monthly progress report for TC Assignments
6. Monthly progress report (Aggregated) for OCG management/Livelink

Control Quality and Rework

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- Capture acceptance criteria early
- Check quality of products against criteria
- Ensure users reviews are addressed

Kick-off workshop wrap-up

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a) Role of TC stakeholders

b) Consultant collaboration with the Bank – tools (Huddle and report templates)

c) ToRs, results matrix, outcomes & outputs;

d) Consultants work plan;

e) Inception mission;

f) Inception report and Final Report for a Deliverable.

g) TC reporting to the Bank.