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English for Managing and Implementing EU Projects

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NEW SZÉCHENYI PLAN

CONTENTS

1. WHAT IS A PROJECT?

1.1. Lead-in

Think about the following questions and jot down your answers. Compare and discuss your answers with those of other members of your group.

– Have you ever participated in project work?
– Have you ever heard about projects in your neighbourhood? At your school?
– What was the aim of that project?
– Who were the participants?
– How much time was needed to complete the work?
– What was the project outcome?
– Who benefited from project outcomes?
– Do you consider it a successful project? Why? Why not?

1.2. Definition(s)

It is not easy to define what a project is. First, becuase it is a relatively new term, and, second, because a project is very complex and it has many elements. Dictionaries offer the following – very simple – definitions:

1. Plan for a scheme or undertaking (OXFORD, 1989)
2. An undertaking requiring concerted effort. (WEBSTER, 1980)
3. A carefully planned piece of work to get information about
4. something, to build something, to improve something etc. (LONGMAN, 2006)

If you look for more elaborate definitions than the above ones, you will possibly find them in project management handbooks and/or project-related internet sources.

Some examples are as follow:

1. A project is **„the means by which a particular result is delivered using specified resources within a set timeframe."** (Hobbs, 2009)

2. „A project is a **temporary endeavor, having a defined beginning and end** (usually constrained by date, but can be by funding or deliverables), **undertaken to meet unique goals and objectives, usually to bring about beneficial change or added value.**" (Wikipedia)

Considering the above definitions, a project is a task (an endeavor), which has several specific features:

– Well-defined goals (objectives),

– Uniqueness (usually one-at-a-time),

– Timeframe (lifetime, lifecycle: defined start and end dates),

– Cost (project budget),

– Quality,

– Concerted and well-coordinated project activities. (They are often grouped as work packages),

– Complexity (the interrelatedness of the various project tasks)

– Project team engaged in well-coordinated teamwork,

– A beneficial outcome for a smaller or larger community.

Consequently, projects are also means by which individuals and/or groups of individuals can bring about a beneficial change, can adapt to new situations and take advantage of new possibilites using their own creativity.

Projects can be found in all walks of life, from education through environmental protection to construction work. Some of these projects may affect a large community of people (for example the construction of a new motorway), while others bring about change only in the

life of a smaller group of people. (E.g. publishing a school newsletter, or developing a new language curriculum).

Some projects are highly **visible** and **tangible** (a new library, or a new playground in town), while others can be called **invisible** or **intangible** projects (a language improvement course, or a tourism conference). In this latter case, since project outcomes are invisible, or intangible, it is a task of utmost importance that management teams make the public aware of these projects through a large variety of **dissemination activities** (radio and TV appearances, conferences etc.) and **publicity materials** (flyers, leaflets, brochures, posters etc).

1.3. International organizations and programmes in the area of education The European Comission

The European Commission is one of the EU's three key institutions,[1] part of the „institutional triangle". The Commission proposes new regulations to the European Parliament and the Council of the European Union, and it ensures that EU law is correctly interpreted and applied by member countries. It has several branches (called Directorates-General, or simply DGs) and Agencies. The task of the Directorates-General are to implement EU policies, while the agencies deal with the management of concrete EU programmes.

1.3.1. Key agencies of the European Comission

EACEA is an abbreviation for **The Education, Audio-Visual and Culture Executive Agency**, an organization within the European Commission. It has been active since January 2006. This agency is responsible for programmes in the field of education, youth, culture, citizenship and audiovisual development.

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[1] The European Parliament, The Council of the EU, The European Commission

The programmes and actions delegated to the agency include the following:
– Lifelong Learning,
– ERASMUS MUNDUS,
– Bilateral cooperation in the field of higher education,
– Tempus,
– Media,
– Europe for Citizens,
– Culture,
– Youth in Action.

Within Lifelong Learning Programmes (LLL) the **Comenius** programmes and actions (multilateral projects, multilateral networks and accompanying measures) are aimed at improving various aspects of primary and secondary school education. The **Erasmus** multilateral projects, networks and accompanying measures can be used by higher educational institutions, teachers, students and staff. The **Leonardo da Vinci** programmes are aimed at improving vocational training systems, while the **Grundtvig** projects and networks focus on improvements in adult education. Lifelong Learning **Transversal programmes** have specific objectives. They have to be designed in order to promote cooperation and innovation and improve quality and transparency in education and training systems of the Member-States. Four key activities can be identified in the group of Transversal Programmes and they include the following areas:
– Policy co-operation and innovation,
– Languages,
– ICT (Information and Communications Technology),
– Dissemination and exploitation of results.

The **Erasmus Mundus** programmes aim to enhance quality and cooperation between higher education institutions of Europe and the rest of the world. Perhaps the most interesting possibilities in this area are the elaboration of joint degree programmes and the establishment of partnerships with non-European higher education institutions.

The Europen Commission has set up bilateral agreements between European – and, in some cases non-European – countries to fund innovative pojects in the area of academic cooperation and student mobility. These programmes are called **Bilateral cooperation in the field of higher education**.

Tempus programmes were set up in 1990 to support the modernization of higher education in EU neighbours. In these programmes cooperation is extended to consortia of higher education institutions, ministries, non-governmental organizations and businesses of partner countries from the West Balkans, Eastern Europe, Central Asia, Northern Africa and the Middle East.

The **Media** programme supports training activities, film festivals, the production and distribution of films and audiovisual materials and new, innovative digital technologies.

Europe for Citizens projects aim at bridging the gap between Europe and its citizens. Project participants can take part in transnational citizenship programmes and a variety of cooperation activities and, at the same time, they can learn about the European Union.

The **Culture** programme emphasizes the common cultural heritage of Europeans, supports the mobility of cultural players in Europe and enhances the transnational circulation of art objects and cultural products (international exhibitions, guest performances).

Youth in Action programmes focus on the young people of Europe and they enhance solidarity and tolerance among them. Another aim of these projects is to involve young Europeans in joint actions and teach them how to become active and responsible European citizens in the future.

CEDEFOP is the **European Centre for the Development of Vocational Training**. This agency was founded in 1975 and now is based in Thessaloniki, Greece. Its aim is to develop „the right policies to provide the right skills" in the area of vocational education and training (VET). Through a variety of mobility programmes and study visits, as well as by promoting excellence it helps make VET attractive for young Europeans.

From 2014–2020 a new programme, **Erasmus for All** would be implemented which is aimed to bring together all the current

EU and international schemes for education, training, youth and sport into one.

Thus the new programme, called Erasmus for All, will replace seven existing programmes with one complex scheme. This feature is expected to increase efficiency and make it easier to apply for grants.

1.3.2. Key European networks

EURYDICE is an information network on education in Europe. It provides in-depth information on and analyses of education systems and policies in Europe. There are online **thematic reports** (Modernization of Higher Education in Europe, Science Teaching in Europe, Key Competences in European Education, to mention but a few) and publications available, including **Facts and Figures** and **Key Data**.

European Student Union (ESU) represents the community of about 11 million European students. ESU coordinates the activities of 47 national unions of students and it represents their educational, economic, cultural and social interests. The European Student Union creates training opportunities, organizes conferences and workshops. It also aims to bring together different players from the area of education, including representatives of ministries and other decision-making bodies, university teachers and staff, employers and, at last, but not least, student bodies

1.4. Tasks and question

Can you identify some key words which are typical of projects?

Can you mention some project types from the area of education?

Find out more about international and national educational projects by browsing the following websites:

– `eacea.ec.europa.eu/about/programmes__delegated_to_ eacea-en.php`

– `cedefop.europa.eu`

– esu-online.org

– ec.europa/grants/index_en.htm

– english.tpf.hu/

Which project type do you think would be suitable for

– groups of secondary students from different countries interested in environmental issues?

– a university choir seeking opportunities to perform abroad?

– language departments of three European universities intending to develop an intensive language programme?

– teachers and students from a Canadian, a Hungarian and a German university intending to implement a joint degree programme in tourism?

– students of a higher vocational programme in tourism who intend to work for a travel agency abroad in the summer?

What is Erasmus for All?

Watch the training video „What is project management?" on youtube and find out what the 6Ps mentioned in it are. (WWW.YOUTUBE.COM/WATCH?V=9LSNINGLKQA)

2. THE EVOLUTION OF PROJECTS AND PROJECT TYPES

2.1. Lead-in

Do you know some ancient „projects"? Continue the list:

– The Great Wall of China

– ....

– ....

– ....

– ....

2.2. The evolution of project

Although there is a general view that the history of modern project management can be traced back to the mid-20th century, the antecedents of project management are actually very old. We have seen in the previous chapter that project outcomes are long-lasting and they express human creativity. Consequently, the construction of such ancient monuments as the Great Wall of China or the Egyptian pyramids can be considered the forerunners of modern building projects. Thus the first project managers in history were creative artists and engineers. **Ictinus** and **Callicrates** were the co-architects („project managers") of the construction of the Parthenon in **Ancient Athens** as early as the 5th century B.C.

Marcus **Vitruvius** Pollo is an example of project manager-architects from **Ancient Rome**. He lived in the 1st century B.C. and originally worked as an army engineer. He is well-known for authoring a book entitled De Architectura Libri Decem (Ten Books of Architecture), in which he identified the most important qualities of buildings. He mentioned surprisingly modern features, characteristic of contemporary architecture as well: firrmitas (strength/stability), utilitas (function) and venustas (aesthetic quality/beauty).

Sir Christopher Wren was a 17th century English designer and architect, who rebuilt London after the Great Fire of 1666. He designed as many as 55 of London's 87 churches. His masterpieces include St. Paul's Cathedral and the secular buildings of London's Royal Naval College and Hampton Court Palace. On his grave in the crypt of St. Paul's Cathedral visitors can read the following inscription: „... Here in its foundations lies the architect of this church and city, Christopher Wren, who lived beyond ninety years, not for his own profit but for the public good. Reader, if you seek his monument – look around you…" [2]

The modern forefathers of project management were **Henry Laurence Gantt** and **Henri Fayol**. Henry Gantt, an American engineer and management consultant, elaborated his first project-related charts in the 1910s. These charts actually represent an easy-to-use project management tool. They show a list of project activities displayed against time. First the charts were drawn by hand and they had to be redrawn in accordance with project changes, but now, in our computerized world it is very easy to update, save, send or print them using appropriate software programmes or templates. (WWW.SMARTDRAW.COM/, WWW.SMARTSHEET.COM/GANTT-CHART-SOFT, DOWNLOAD.CNET.COM/GANTT-CHART)

Henri Fayol was a French mining engineer at the turn of the 19th and 20th centuries. He laid down the main principles of the world's first comprehensive management theory, called **Fayolism**. He elaborated seven functions and 14 principles of management.

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[2] For the full text see WIKIPEDIA.ORG/WIKI/CHRISTOPHER_WREN.

Activities	Year 0	Year 1	Year 2	Year 3
Needs analysis	Xxxxxxxxxx			
Project design	Xxxxx	xxxxx		
Implementation		xxxxxxxxx	xxxxxxxxx	
Quality assessment		xxxxxx	xxxxxxxxxx	xxxxxxxxx
Dissemination			xxxxxxx	xxxxxxxxxx
Follow-up				xxxxxx

1. chart: A simplified Gantt chart
Source: author's own design

Fayol saw the manager's main job in planning, organizing, commanding, coordinating and controlling.

In the history of project management the 1950s represent a significant period and it was the time when two powerfiul project management tools, the **Critical Path Analysis** (CPA) and a variation of it, the **Program Evaluation and Review Technique** (PERT) were born. CPA uses the idea that certain project activities cannot be started until others are not finished (they are sequential). Other activities are non-dependent, or parallel, that is they are not sequential; they can be performed any time within the project's lifetime.

PERT is a statistical tool designed to plan very complex projects. (An example was the Grenoble Winter Olympic Games in 1968). This method concentrates on the time factor in projects and operates with variables such as Normal Duration Time (ND), Early Start Time (ES), Late Start Time (LS), Early Finish Time (EF) and Late Finish Time (LF). Both CPA and PERT make it possible to identify parallel and sequential project activities, manage time, prioritize tasks and find the most efficient ways of shortening time in case of urgent and complex projects.

Today it is thought that one of the most important features of a project is that all its parts should be coordinated and all participants need to work in unison toward its specific goals. According to project

management styles two significant trends have emerged in project management a) the bottom-up approach and b) the top-down approach.

2.3. Project types

Projects can be classified by their different characteristics. On the basis of what a project is supposed to produce five different project types can be Outlined (USERS.GLOBALNET.CO.UK/RXV/PROJMGT/PROJTYPES.HTM). By **project outcomes** there are **Construction projects**. They produce artefacts. (An IT system, a new bridge, a playground, a new coach terminal etc.)

1. **Research projects:** These projects produce knowledge. (Developing a new plant species, developing new approaches to project management, the implementation of a new language program)

2. **Reengineering projects** produce a desired change in a system. (New system of telephone numbering, installing an Intranet system in the office, developing a new teacher training curriculum etc.)

3. **Procurement projects** produce a business relationship. (Outsourcing IT or cleaning services)

4. **Business Implementation projects:** Produce an operationally effective process. (Implementing e-commerce).

On the other hand, according to **John Reynolds** (PROJECTSMART.CO.UK/PROJECT-MANAGEMENT-THE-3-MAJOR-PROJECT-TYPES.HTML) there are **three major project types**. The first type can be found in the field of civil **engineering**, construction, and mining. They often require massive capital investment and there are many different contractors, specialists in them. The second type is the **manufacturing project**. These projects aim to produce a vehicle, machinery, a piece of clothing etc. They are usually related to a factory or workshop. The third project type is the **management project**. Most often these are the invisible, intangible projects. A new IT system, a new language programme at the university, or a new marketing campaign.

By **project management style**s two project types can be identified. **Bottom-up projects**, initiatied and coordinated by team members as well. Their participation is essential in each phase of project work. This trend usually implies simple project designs, shorter project life time and strong team member involvement. This is also known as agile project management. **Top-down projects** have lately become extremely popular. This project type means that the project management team is responsible for the entire project. They give guidelines, provide information and are responsible for planning, funding, implementation and dissemination as well. On the other hand this management style might slow down the completion of projects by making members less motivated.

By **project scope** there are **local** (e.g. the modernization of the public transport system in Szeged), **regional** (Danube Regional Project to improve the environment of the Danube River Basin), **national** (e.g. the modernization of the Hungarian higher educational system) and **international projects** (e.g. the implementation of the Bologna system at European universities).

By their **complexity** there are **simple projects** (e.g. design and setup of a new university website), **complex projects** (design and setup of 150 new university websites in 10 European countries), **entire programmes**, consisting of several interrelated projects (e.g. establishing new company headquarters including the construction of a new office building, purchase of new office equipment, training of new staff etc.) and **megaprojects**, which are extremely large-scale and costly investments.

(Project budgets exceed $1 billion) Examples of megaprojects (sometimes called gigaprojects as well) include aerospace projects, large-scale transport (metro) projects, airport expansion, or the construction of the Interstate highway system in the United States. For further examples you can go to the following website: HTTP://EN.WIKIPEDIA.ORG/WIKI/LIST_OF_MEGAPROJECTS.

2.4. Questions and Tasks

Name (s)	Where?	When? (century)	What?
Ictinus and Callicrates	Ancient Athens	5th c. B.C.	Parthenon
M. Vitruvius Pollo	Ancient Rome	1st century B.C.	Ten Books of Architecture
Sir Christopher Wren	London	17th century	St. Paul's Cathedral
Henry Gantt	U.S.	1910	Gantt Chart
Henri Fayol	France	Turn of the 19th and 20th centuries	1st management theory

2. chart: Based on the text of 2.2. The Evolution of projects complete the grid below with the missing information

What do the following abbreviations mean?
CPA: Critical Path Analysis
PERT: Program Evaluation and Review Technique
ES : Early Start Time
LS: Late Start Time
EF: Early Finish Time
LF: Late Finish Time

Give examples of the following project types:
1. Manufacturing project: Mercedes in Kecskemét
2. Procurement project:: purchase of Polish trams in Szeged
3. Research project: cancer research
4. Reengineering project: ne telephone numbering system
5. Local project: local transport project in Szeged
6. Regional project: New regional Labour Office
7. Construction project: Building a new University Study Centre
8. Mega (giga) project: Underground 4 in Budapest

3. PROJECT PHASES

3.1. Lead-in

The various project phases have been jumbled. Number them according to their likely sequence.

..... Planning and design

..... Closure

..... Initiation

..... Execution

3.2. The project sequence

Project life cycle (often referred to as PLC) may range from a single year (e.g. dissemination projects) through two or three years (e.g. ERASMUS Key Activity and Network projects) to 4-5 years (major building projects). In Project Management Life Cycle Methodology there are four major phases: (1) **Initiation**, (2) **Planning and design**, (3) **Execution** (also called Implementation) and (4) **Closure**. Some other sources (HOBBS, 2009) on the other hand identify six project phases which are as follow: (1) **Initiation**, (2) **Definition**, (3) **Planning**, (4) **Control**, (5) **Implementation**, (6) **Review**. In theory these phases represent a sequence, meaning that Initiation is the first phase and Closure (Review) is the last phase; in practice the individual phases often overlap.

Control ideally should be part of each phase. Project Implementation and Review may also be important factors throughout the project life cycle. As a consequence, project managers should demonstrate a great degree of flexibility throughout the life cycle of their projects. Re-evaluation and error correction (also called troubleshooting) concerning time, budget, staff and other resources within a project can be essential for successful completion.

1. diagram
Source: Project Management Methodology Life Cycle

3.2.1. Initiation

Project initiation is the first phase and it is the very beginning of the project. At first the main **idea** of the project is to be identified. As it is defined by relevant literature „The aim of the initiation phase is to set out the reasons for a project and the context in which it will run." (Hobbs, 2009) The main questions that arise in this phase include: What? Why? Who? For whom?

The main goal of the first phase is to identify and elaborate the **purpose** and the **scope** of the project. It should also be decided who is to work on the given project, who the project partners are and what project types and partnership forms are the best for carrying out the project.

Once there is an idea the starting point should be the elaboration of a **feasibility study**. As it is defined by the online Business Dictionary, „… feasibility study is an analysis and evaluation of a proposed project to determine if it (1) is technically feasible, (2) is feasible within the estimated costs, and (3) will be profitable. Feasibility studies are almost always conducted where large sums are at stake. Also called feasibility analysis."

As far as the human resources of the given project are concerned it is vital to carry out preliminary needs assessment or needs analysis. At this early stage those questions should be formulated and asked which provide relevant information on the human aspects of the would-be project.

Consequently, needs analysis is an essential part of the initiation phase in all service-related projects, such as the opening of a company customer-centre, or the implementation of a new language teaching curriculum at the university.

In educational projects, for example, it is important to collect information about students' learning needs, their wishes and desires. The expectations of other parties also need to be tackled; in educational context for example, the opinion of managers, teachers, parents, administrative and technical staff, would-be employers etc. also need to be considered.

Needs analysis may take different forms: it can focus on context, content or the end-users. Data gathering can be formal or informal and different methods can be used to do it, including observation, surveys, questionnaires, interviews, checklists, tests or rating scales. Findings of the process of needs analysis can be presented in a variety of ways, most often by using graphs, tables or charts. At the end of Phase 1 from these findings conclusions are to be drawn and recommendations made, all of which are of utmost importance for project outcomes.

3.2.2. Planning and design

In everyday life the word „planning" means setting the direction for something. In project life cycle after defining the project and identifying the project team the next task is to set up an accurate and detailed plan; it needs to be done even before the project actually starts. A good project plan is half of the success; in addition, it can save time, money and make life much easier for everyone involved. On the basis of the findings of the feasibility study and the preliminary needs analysis, a clear set of project goals needs to be identified, which should all be recorded in the project plan. The following step is the creation of project deliverables, which are things that need to be created in order to meet **project goals**. The **list of deliverables** also need to be added to the project plan, together with an estimated delivery date.

Another task of Step 3 is the creation of the **project schedule**. It involves a list of tasks that need to be completed for each deliverable. In addition to describing the tasks it is also important to establish the amount of effort (in workdays or hours) for each task. It is followed by an accurate delivery date. The elaboration and addition of all these factors is not a simple task, but there are several websites and project planning templates available to make this work easier. To find out more you may want to look at the folowing websites: WWW.PROJECTMANAGEMENTDOCS.COM/PR, WWW.PROJECTKICKSTART.COM/, WWW.PROJECTS.UTS.EDU.AU/.../TEMPLATES.

In this phase there are some additional materials, called **Supporting plans** as well.. They may include a Resource plan (a list of equipment, staff, time resources available), a Financial plan (salaries, utilities, office supplies, travel etc.), a Quality plan (systematic process that translates quality policy into measurable objectives), a Risk plan (used to foresee risks and suggest strategies to overcome the difficulties), a Communications plan (actions to reach target audiences) and a Procurement plan (list of purchasing activities) .

3.2.3. Execution (Implementation)

It is the longest-lasting and most complex phase in the project life cycle. It is the phase in which the deliverables do physically come into existence and the project actually takes shape. It is the phase in which the deliverables are offered for the users for acceptance and the project becomes visible and tangible for the outsiders as well To put it very simply, the execution/implementation phase is the **„doing phase"**.

While each deliverable is being constructed, a series of management processes are undertaken to **monitor** and **control** the deliverables. At the end of the implementation phase the results are evaluated according to the criteria that were created earlier. Once all the requirements are met, the project execution/implementation phase can be declared complete. Monitoring and controlling include proper time management, cost management, quality management, change management, risk management, procure management, acceptance management and communications management procedures and proper documentation as well.

When all the deliverables have been constructed and the clients have accepted the final version, the project is approaching its closing stage.

3.2.4. Closure

Projects are very different by nature, so it is very important to signal the point when they end. It can be an easy task when the project deliverable is a tangible object: the book goes into print or, the city's new hotel is opened. In case of intangible deliverables the situation is more complex. With many projects in higher education, like the SPEAQ (**S**haring **P**ractice in **E**nhancing and **A**ssuring **Q**uality) project within the European Union's ERASMUS Lifelong Learning Programme, the situation is very different, Sharing practice and experiences is a continuum, an endless flow of communication- and dissemination-related activities, consequently,

it is hard to say when exactly the project actually comes to its closure. In this latter case correct and clear communication is even more important.

Closure is a milestone in project life cycle because this is the phase when the responsibility for the project outcome is getting transferred from the project team onto the users' team. From this point on the project team acquires a different role: its function is that of an advisory and support body. Post-implementation support is essential in the last phase of project life cycle. The end of the project should also be marked with a special final event. It can be formal, like a conference, or the publication of a project-related book, photo album etc., but it can be informal, too, like a dinner, or an outing for the project team. The final act is to review the project outcomes, celebrate its success, thank the participants and plan ahead. So, project closure is also the time for evaluation, drawing the conclusion, learning from mistakes and problems, and moving onto something new.

3.3. Tasks and questions

Name the first and the last phase of a project's life cycle.

Which is the most complex phase and why?

Mention some phases which often overlap.

How would you celebrate the end of a project of yours?

What plans need to be prepared in the planning phase?

What is the difference between project initiation and planning?

Match the following words with their definitions.

1. Deliverable
2. Scope,
3. Feasibility study
4. Needs analysis
5. Rating,

6. Schedule

7. Template

8. Monitor

A. The work that needs to be accomplished to deliver a product, service, or result with the specified features and functions.

B. An evaluation and analysis of the potential of the proposed project which is based on extensive investigation and research.

C. A tangible or intangible object produced as a result of the project.

D. Make continuous observation.

E. Classification or ranking according to quality.

F. The process of identifying and evaluating needs in a defined community (students for example).

G. A plan for performing work or achieving an objective, specifying the order and allotted time for each part

H. Master page on which you can globally edit and format graphic elements and text .

Key
3.3.2.
1C, 2A, 3B, 4F, 5E, 6G, 7H, 8D

4. WHO IS WHO IN A PROJECT?

4.1. Lead-in

Provide the missing letters of the following compound words. Which of them would relate to a „person"?

(1) Project t....m, (2) project m..........r, (3) project w....k, (4) project a..............t, (5) project c...................r, (6) project s......f, (7) project d............r, (8) project p....n, (9) project c......s, (10) project e................n.

4.2. Project team

Every project is different, but a common feature can be that they all involve a number of various tasks, which are performed by one or a group of key persons. These people are called **project staff** or **project team**. It can be defined as follows: A project team is a team whose members originally belong to different groups, and who are assigned to activities within the same project. They work toward a common goal and share responsibilites.

How can team members successfully work together? According to relevant literature (WWW.PROJECTSMART.CO.UK/5-ESSENTIALS-TO -PROJECT-TEAM-SUCCESS.HTML) the most important factors influencing success are as follows:

1. Team composition and roles,
2. Team goals and expectations,
3. Team resources,
4. Team sponsorship,
5. Team recognition and rewards.

1. Team composition and roles

One of the most important characteristics of a successful project team is that people should possess a number of common key competencies and, at the same time, they should master different skills and assume various roles, which are relevant for project work. Problem solving skills, excellent collaboration and communication skills are for example essential for each team member and for every team. Team roles include those of a sponsor, facilitator, coordinator, communicator, technical expert, financial expert, quality expert and someone who, permanently keeps an eye on the project goal. One person may be responsible for more than one task.

Team development or, **team building** should be an essential task at the beginning of every project. Team building includes the implementation of training programs in communication and collaboration skills and the building of a strong sense of identity. Team members should know and respect each other and they also should know how their roles fit together. As far as team size is concerned, an „ideal" team consists of 5-7 team members.

2. Team goals and expectations

To identify and pursue the proper goal(s) are essential tasks for every project team. It is also important to make these goals widely known because later on in project lifetime it can provide the basis for measuring progress.

3. Team resources

The resources a team needs to meet its goals might vary from project to project, but there are two resources which are indispensable for the success of every single project.

These are **time** and **talent**. If the completion of project tasks is delayed or cancelled more than once, if team members do not possess the motivation, the skills and the talent which are needed for meeting the goals, the team, as well as the project as a whole are doomed to fail.

4. Team Sponsorship

The sponsor is to be actively engaged with the team. This regular engagement can make things happen within the project and can create the positive atmosphere and the enthusiasm within the team which are the prerequisites of effectiveness and real success.

5. Team rewards and recognition

Studies have identified two things most people want and need at work. These are being recognised as a contributing member to a useful enterprise or task, and they want to be rewarded for their accomplishments. Of course, recognition and reward may take various forms from expressing thanks to giving bonuses.

4.3. Stakeholders

It is for sure that in project management proper **stakeholder management** is a key to success. The stakeholders are people, who are affected by or who affect project work. Stakeholder management is an important project activity that is used by people to win the support of „outsiders". The group of stakeholders might include people from all walks of life from team members' family and their potential customers to the press and Ministry officials. Managing stakeholders practically means engaging the right people in the right way.

The benefits of a stakeholder-based approach is important in every phase of the project, from the very beginning to the very end. It is important initially because the opinions of the most powerful stakeholders can help shape project goals. Stakeholders can also play an important role in gaining more or better resources later on in project life. By communicating with stakeholders throughout the project it is possible to foresee people's opinion on and reaction to project goals and outcomes. Stakeholders can be useful in dissemination and sustainability as well.

The steps of stakeholder analysis and management include a) identifying who the stakeholders are, b) prioritizing them, i.e.

finding out who the key stakeholders are and c) understanding their points of view and interests. It is useful to use a template to map stakeholders on the basis of their interest in the project and their power over project work and outcomes. Family members, for example, may have high interest in the project, but have low power over it. High-rank officials may have little interest (hopefully only at the beginning of the project), but they have high power over project work and outcomes.
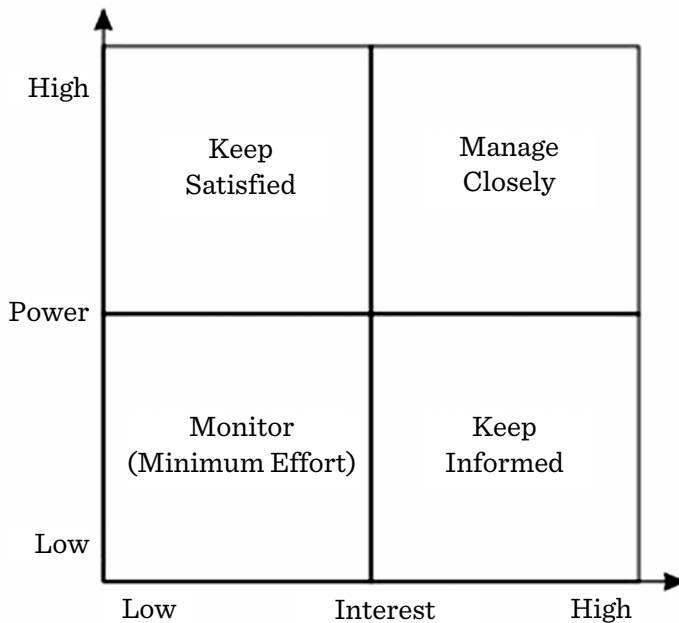
2. figure

This template can be useful in project work because it illustrates what actions need to be taken with the individual stakeholder groups. The group of high-power, interested people needs to be fully engaged and closely managed; high power, less interested people need to be satisfied, low power, interested people need to be properly informed and low power, less interested people need to be monitored.

34

4.4. Project manager

Who are project managers? They make things happen and this is becauase they are usually referred to as change agents. They are exceptional people who can work efficiently and independently under pressure, who are creative and dynamic and who are comfortable with changes. Project managers need to have exceptional people skills, too, becuase they need to develop trust and communicate efficiently with internal project team members and with external stakeholders as well. A project manager should be a consistent and competent planner, team leader, a powerful negotiator and influencer and, as such, should have excellent problem solving skills.

How good are your problem solving skills?

	Statement	Not at all	Rarely	Sometimes	Often	Very often
1	Once I choose a solution, I develop an implementation plan.					
2	After a solution has been implemented, I immediately look for ways to improve the idea.					
3	I take care to define each problem carefully before trying to solve it.					
4	I look at problems from different perspectives and develop multiple solutions.					
5	I want others to understand and support my solution.					
6	I evaluate potential solutions carefully.					
7	I systematically search for issues that may become problems in the future.					
8	When I decide on a solution, I make it happen.					
9	I find that small problems often become much bigger.					

	Statement	Not at all	Rarely	Sometimes	Often	Very often
10	I ask myself lots of different questions about the nature of the problem.					
11	After my solution is implemented, I relax.					
12	I hope that problems don't appear.					
13	I evaluate potential solutions as I think of them.					
14	When I need to find a solution to a problem, I usually have all of the information I need to solve it.					
15	When evaluating solutions, I take time to think.					
16	Making a decision is the end of my problem-solving process.					
	Total =					

First column: 5 points, second column 4 points, third column 3 points, fourth column 2 points and fifth column is 1 point. Now add up your scores and read the Score Interpretation.

Score Interpretation

Score	Comment
16–36	You probably tend to view problems as negatives, instead of seeing them as opportunities.
37–58	Your approach to problem solving is a little „hit-and-miss". Sometimes your solutions work really well, and other times they don't.
59–80	You are a confident problem solver.

3. chart: Adapted from

HTTP://WWW.MINDTOOLS.COM/PAGES/ARTICLE/NEWTMC_72.HTM

4.5. Project assistant

A project assistant usually helps the project manager or a project director with everyday duties. In most cases his/her work includes administrative tasks. Depending on the size of the project the assistant may do all the administrative tasks or may assist just one person with one special area. A project assistant works with spreadsheets, timelines, budgets, task lists. It is also part of his or her duties to keep all these files and sheets updated, communicate the changes and updates, fill in forms and permits, purchase orders, manages correspondence and assists the manager with writing the regular reports.

4.6. Tasks and questions

What is a project team?

Who are the members of a project team?

Who are the stakeholders?

Why are they important for a project?

How do we categorize stakeholders?

What are the qualities of a good project manager?

What are the tasks of a project manager?

What are the tasks of a project assistant?

Key
4.1.
team, manager, work, assistant, coordinator, staff, director, plan, costs, evaluation

NEW SZÉCHENYI PLAN

5. SUCCESSFUL COMMUNICATION WITHIN A PROJECT

5.1. Lead-in

A project manager, when communicating with various people, sometimes has to use formal, sometimes informal style. Complete the following table with the missing pairs.

	Formal	Informal
1	Could we just rewrite the financial section of the project application?	
2	Do not hesitate to contact us if you have any questions relating to our project.	
3	I apologize for not getting in contact with the project assistant before now.	
4	I would be grateful if you could give me some information on the project partners.	
5	Thank you in advance for your assistance in this matter.	
6		This is totally irrelevant to our project.
7		Don't interrupt the project manager.
8		Bring me the project dossier.
9		I don't agree.
10		Here is the document you wanted.

4. chart

5.2. Communication

It is clear that project success depends greatly on effective project communication. In general it can be stated that the information we communicate should be appropriate and timely. A Communications Management Plan, developed in the Planning phase of the project can be a useful tool to make sure that those who need information, get it on time and in a format and style which is appropriate, easy to follow and use. It is also good to request feedback to the communication attempt. Communication is **NOT ONLY** talking to the team members and telling them what you expect of them – it goes much, much deeper. Successful project management communication is about being there for everyone, being in touch with the real challenges of the project. To be a good communicator also means to be a good listener. The project manager, as a communicator has to focus on what other people have to say and he/she needs to understand their point of view. A good communicator also needs to possess some psychological skills and has to try to assess how other people feel about the project and tries to understand what lies behind their emotions.

The project manager is in the centre of all communication attempts within the project team and between the project team and the outside world. (External stakeholders, most importantly the sponsors and the clients). The communication with external stakeholders is characterized by a greater degree of formality and politeness. Also, it should be characterized by a high level of openness and trust from the very beginning of the project. Honesty and openness are important when talking with the members of the project team as well.

Commmunicate regularly and efficiently with external and internal people. Sometimes it is difficult to maintain good communication, especially, in larger and longer-running projects, or, in international projects with the team members working in 10-15 different countries. In these cases it is useful to turn to intranet sites or project management applications to which team members have access. (Basecamp, IRIS, Happytodos and Doolphy to mention but a few. examples).

Care is needed when selecting the medium by which messages are communicated. Sending a sensitive message via email for example, can create a lot of problems. Sensitive issues need to be clarified first in personal meetings. The following table illustrates how to select the right medium for a concrete message, depending on its emotional and intelllectual impact.

Message: simple, but emotionally charged, possibly requiring action from the recipient **Medium:** ad-hoc meeting, one-to-one meetings, telephone conversation	**Message:** complex, with a high risk of misunderstanding or hurt feelings. Need for the recipient to take action **Medium:** formal meeting, video conference
Message: simple, with a low risk of misunderstanding or hurt feelings **Medium:** Voicemail message, email, note on the desk	**Message:** intellectually complex. But there is no risk of emotional involvement. Focuses on facts and figures **Medium:** fax, email, letter, memorandum

5. chart
Adapted from Hobbs: Project Management. 2009. p. 49.

Some project managers prefer the so-called active methods including face-to-face meetings, video conferencing, or telephone conferencing, while others tend to opt for passive methods of communication including emails, text messages, memos, or websites. Although modern technology can be very popular, it is very important for a project manager to mix the active and the passive forms.

5.3. Written versus verbal

As it can be seen from the table above project communication implies written and verbal forms. In addition, non-verbal forms (body language, paralanguage – including intonation, pitch, tone) also play a role. Communication during projects can be of many different types such as oral, written and non-verbal. Oral communication is mainly utilized in face-to-face meetings or over the telephone as well as in group meetings and affords a lot more flexibility to the speaker, such as the ability to communicate not only with words but body language (postures, gestures, facial expressions) as well. On the other

hand, written communication is usually more precise. It can be sent through correspondence such as memos, letters or notices. It can also be sent via email or the project management information system. It is mainly for its clarity that project communication is dominated by written forms. A golden rule in project management is „What hasn't been written hasn't been said!"

The purpose of the written document is twofold. First, it is essential for project records and project evaluation. Second, the written document can be helpful to clarify and refine meanings within the project team or between the project team and the outside world.

Each document needs to have a so-called version control panel on it which indicates

– Number and name (acronym) of project,

– Number of revision,

– Date,

– Responsible person issuing document,

– File identification and location.

5.4. Project records

The following project files need to be maintained:

1. Correspondence
2. Minutes of meetings
3. Stakeholder contact details, team organization chart (Who is doing what within the project?)
4. Project initiation including details of project purpose, needs analysis, objectives, evaluation criteria.
5. Project proposal
6. Project plan (signed-off copy and its amendments. Mandate, Consortium agreement or any other legal contract including work contracts and timesheets).
7. Change requests
8. Project budget
9. Risk log.

10. Status reports

11 Procurement documents

12. Instructions issued (letters, emails, memos etc.)

13. Quality plan.

14. Project archives. (Timesheets, photos, blogs, flyers, presentations, articles etc).

5.5. The SPEAQ project: examples of project communication

The Sharing Practice in Enhancing and Assuring Quality (SPEAQ) project is an LLP Multilateral Project, coordinated by experts from the University of Southampton (United Kingdom). Project partners include the University of Aveiro (Portugal), Babes-Bolyai University (Romania), Copenhagen Business School (Denmark), Deusto University (Spain), Innsbruck University (Austria), University of Jyväskalä (Finland), University of Trento (Italy), University of Szeged (Hungary) and the European Students Union.

5.5.1. Sample documents

MANDATE

Szegedi Tudományegyetem (SZTE)

H-6720 Szeged, Dugonics tér 13.

(„the co-beneficiary"), represented for the purposes of signature of this mandate by professor Dr. Gábor Szabó, Rector.

of the one part, and University of Southampton (SOTON)

RC000668

Highfield, Southampton, SO17 1BJ, UK

GB 568 6304 14,

(„the co-ordinator"), represented for the purposes of signature of this mandate by COE, Amanda, Faculty Finance Manager for Faculty of Humanities of the other part,

---

HAVE AGREED

For the purposes of the implementation of the project „Sharing Practice in Enhancing and Assuring Quality" with the Education, Audiovisual and Culture Executive Agency,

The following:

1. The co-beneficiary grants power of attorney to the co-ordinator, to act in his name and for his account in signing the above-mentioned agreement and its possible subsequent riders with the Education, Audiovisual and Culture Executive Agency. Accordingly, the co-beneficiary hereby mandates the co-ordinator to take full legal responsibility for the implementation of such an agreement.

2. The co-beneficiary hereby confirms that he has taken careful note of and accepts all the provisions of the above agreement with the Education, Audiovisual and Culture Executive Agency, in particular all provisions affecting the co-beneficiary and the co-ordinator. In particular, he acknowledges that, by virtue of this mandate, the co-ordinator alone is entitled to receive funds from the European Union and distribute the amounts corresponding to the co-beneficiary's participation in the action.

3. The co-beneficiary hereby agrees to do everything in his power to help the co-ordinator to fulfil its obligations under the above agreement. In particular, the co-beneficiary hereby agrees to provide to the co-ordinator whatever documents or information may be required, as soon as possible after receiving the request from the co-ordinator.

4. The provisions of the above agreement, including this mandate, shall take precedence over any other agreement between the co-beneficiary and the co-ordinator which may have an effect on the implementation of the above agreement between the co-ordinator and the Education, Audiovisual and Culture Executive Agency.

5. A copy of this mandate shall be annexed to the above agreement and shall form an integral part of it.

SIGNATURES

For the co-beneficiary
(name/forename/function)
(signature)
Done at (place), (date)

For the co-ordinator
(name/forename/function)
(signature)
Done at (place), (date)

In triplicate in English

Document 1.

TEAM ORGANIZATION CHART
Description of Szeged activities
The activities of Szeged will include the following:

– Participation in three project meetings
– Running a quality workshop in own institution
– Collecting data on quality experience of students, quality administrators and subject teaching staff in own institution
– Submitting summary reports on data collection activities
– Developing and running an institutional quality project
– Submitting project plan and post-project report
– Publicising the Project on their institution's website
– Providing quarterly online summaries of their activities, timesheets and related financial documents
– Providing documentation for the Progress and Final Reports
– Participating in the dissemination of results at regional and national level, including one local dissemination activity
– Communicating and collaborating with SPEAQ partners through the SPEAQ online project space

In addition Szeged will:
– Devise questions for quality manager interviews

Document 2.

SKYPE meeting – February 2013

Dear All,

Thank you for your replies in Doodle. I can confirm that our next SKYPE meeting will be:

Thursday 14 February, 4pm (UK time)

Hopefully, Christine will be able to join us but unfortunately, Natalia won't. We will try and record the discussion and send it to you like we did before. During the meeting we will talk about your project plans and the feedback on the interim report we just received form the EC, which I am going to circulate on Basecamp shortly.
If you have any questions, please let me know.

All the best,

Document 3.: Sample email

5.6. Tasks and questions

What is a communications management plan good for?

Why is it important to be a good listener?

Who does a project manager have to communicate wih?

What communication types do you know?

What is the added value in oral communication?

What is the added value in written communication?

What project documents need to be filed and maintained?

Project managers are often presenters at project meetings or dissemination conferences. It is essential for them to learn how to do good presentations. Watch the following video and compile a to-do-list what needs to be done before, during and after a presentation. (WWW.PROJECTMANAGER.COM/HOW-TO-DELIVER-A-GREAT-PRESENTATION)

Key

	Formal	Informal
1	Could we just rewrite the financial section of the project application?	**This is wrong. Let us rewrite the fianncial section of the application.**
2	Do not hesitate to contact us if you have any questions relating to our project.	**Let us know if you want to know more about the project.**
3	I apologize for not getting in contact with the project assistant before now.	**I'm sorry for not writing to the project assistant earlier.**
4	I would be grateful if you could give me some information on the project partners.	**Could you, pleae, tell me something about the project partners?**
5	Thank you in advance for your assistance in this matter.	**Thanks for your help.**
6	**I think we should focus on the project itself.**	This is totally irrelevant to our project.
7	**Sorry, could the project manager just finish his/her point?**	Don't interrupt the project manager.
8	**Could I possibly have the project dossier, please?**	Bring me the project dossier.
9	**I would find it difficult to agree with your position here.**	I don't agree.
10	**I am attaching the document you have requested.**	Here is the document you wanted.

6. chart

6. ALL ABOUT MONEY: BUDGETING

6.1. Lead-in

Match the following money-related idioms with their meaning:

	Idiom		Meaning
1	Finances are tight.	A	To be determined to earn an enormous amount of money.
2	Black money.	B	To spend money in one go.
3	To be after the big money.	C	Being short of money.
4	Smart money.	D	A means of making money quickly.
5	A money spinner.	E	Secret money used illegally.
6	To blow one's money on something.	F	Money wasted.
7	To fork out money.	G	To be very rich.
8	Ready money.	H	Money invested wisely.
9	To be in the money.	I	Money that is available.
10	Money down the drain.	J	To pay with reluctance.

7. chart

6.2. Project budgets

Project managers constantly have to try to find answers to money-related questions. How much will my project cost? How much have we spent on salaries/travel/ equipment/telephone? Are we on budget? Do we have enough money to complete all these tasks?

Project budget is an issue of significance – occasionally can be a headache, too – throughout project life cycle. Money-related questions occur all the time when initiating, planning, implementing, closing or evaluating projects. It has various reasons why it is is important to keep track of project costs, i.e. monitor project costs effectively. First, effective monitoring enables project managers to get a true picture of project finances and progress and inform external stakeholders accordingly. Also, cost monitoring reduces risk and it becomes possible to identify problem areas at an early stage and take immediate action. Eventually, cost monitoring provides valuable information for planning future projects.

What is a project budget? It is a prediction of the costs associated with a particular project. These costs include labour, materials and other related expenses. In longer running and more complex projects the project budget is often broken down into specific tasks with task budgets.

6.3. Project costs

There are three basic cost types project managers can work with when estimating project costs.

1. **Resource rates:** The cost of work resource based on the amount of time spent on working on the project. Usually daily or hourly rates are used when calculating these costs. There are rate-based material costs as well, such as building materials or supplies which have standard rates.

2. **Fixed costs (Lump sum):** One total cost that represents the price for doing a task or project, regardless of the number of days or hours spent on the work. (For example organizing a conference or, designing a project website).

3. **Per-use costs:** It is the single amount that it costs each time to use a resource. (For example renting conference facilites at a hotel).

6.4. EU funding

The various departments and agencies of the European Commission, one of the European Union's three key institutions[3] are in charge of the Community grant programs. The Commission awards money in the form of various grants in order to elaborate and implement projects and activities in accordance with EU guidelines and policies. These grants may be awarded in diverse fields from agriculture to environmental protection, health and education. It is possible to find useful information on them by clicking on the relevant area on the website of the European Commission Grants. (EC.EUROPA.EU/ GRANTS/INTRODUCTION_EN.HTM)

The grant beneficiaries are mainly private or public organizations. The grants are a form of complementary financing. It means that the EU does not finance 100% of project costs. The beneficiaries have to use their own funds as well. Another basic principle of EU grants is that they cannot generate profit for their beneficiaries. It is also important to note that EU grants cannot be awarded retroactively for actions that are already completed.

Grants are subject to annual programming The Commission's relevant departments publish calls for proposals every year on their websites. All applications are evaluated on the basis of publicly available criteria. (In case of emergencies some grants are exceptionally awarded directly to certain beneficiaries without a call for proposals. Humanitarian aid is one of the possible examples).

Cost Categories

Indirect costs: The indirect costs of the project are a flat-rate amount set at a maximum of 7% of the total amount of eligible direct costs Indirect costs include all costs for equipment related to the administration of the project (i.e. PC's, portables, etc.); communication costs (postage, fax, telephone, mailing, etc.); infrastructure costs (rent, electricity, etc.) of the premises where the project is being carried out; office supplies; photocopies.

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[3] European Parliament, The Council of the EU, The European Commission

Staff Costs : The rules on staff costs apply to all partners (including the applicant) of the consortium. These costs relate to staff, having either a permanent or a temporary individual contract with a partner of the consortium. Applicants should base the project budget on real daily staff cost rates, which cannot exceed the maximum rate indicated in the table, available on the Commission's website. The estimated staff costs result from multiplying the number of days with the real daily staff cost rate.

Subsistence Costs: Subsistence costs are for staff undertaking travel to another participating country in the framework of the given project. Subsistence rates cover accommodation, meals and all local travel costs at the place of destination abroad.

Travel Costs: Travel costs are allocated on the basis of real costs. The travel cost for a journey should include all costs and all means for travel from the point of origin to the point of destination (and vice versa) and may include visa fees, travel insurance and cancellation costs as well.

Equipment costs: Purchase, rent or lease of equipment (new or second-hand), including the installation, maintenance and insurance costs, is considered eligible.

Subcontracting costs: These are costs entailed by procurement contracts for the purposes of carrying out specific and limited work for the project with the participation of an external body, organisation or individual (only if not employed by any of the Partner organisations of the consortium). This includes work such as translation, interpretation and printing etc.

Other Costs: Other costs are allocated on the basis of real costs. These include costs arising directly: from dissemination of information, specific evaluation of the action, audits, reproduction, translation, the production of proceedings of a seminar, the production of a video. (See: HTTP://EC.EUROPA.EU/EDUCATION/PROGRAMMES/CALLS/2809/FINANCE_EN.PDF)

6.5. How to monitor costs?

It is important to use a timesheet system to keep track of time spent by project team members on project tasks. Particularly in a multi-project environment or in an international project time-sheets provide a mechanism to control and coordinate spending. Out-of-pocket costs (subcontracting costs) can generate problems because of inaccurate estimates, additional features, added later on, or parallel increases in the budget, all of which might lead to cost overruns. In this latter case additional increase in the project budget is needed. If it is not possible, because the budget is fixed, those non-essential features have to be identified, which can be removed from the project, or, can be modified to bring costs back in line.

6.6. The SPEAQ project: examples of budget documents

This and your expenses claim form should be signed and returned by normal mail.

[Name of institution]
Please print on headed paper

INVOICE

Date: 10/02/2012
To: SPEAQ (claims)
LLAS Centre for Languages, Linguistics and Area Studies
School of Humanities
University of Southampton
Highfield Road
Southampton
SO17 1BJ, United Kingdom

Re: Grant Agreement Number: 2011-3870/001-001
Project Number: 517706-LLP-1-2011-1-UK-ERASMUS-EMGR

Costs incurred by University of Szeged for the Lifelong Learning ERASMUS SPEAQ Project during the period from to	Euro
Staff costs (coordinating committee members only)	
Travel costs	
Subsistence costs	
Other eligible expenses (please specify)	
Total	

I hereby certify that copies of tickets, invoices and receipts relating to this invoice are true copies of the originals

Signature of legal representative: ....

Please print name: ....

Position: ....

Date: ....

and stamp with your Institution stamp

Document 4.: Invoice example

BUDGET AND CO-FUNDING FOR UNIVERSITY OF SZEGED

Budget and co-funding

Total estimated budget of the Partner	
Agency funding awarded (maximum)	
Minimum Partner Co-funding (own funds of the Partner, in kind)	

Budget headings for the Partner

Heading	Total Estimated Budget (EUR)	Maximum Amount of Community Grant (EUR)	Partner's own funding (EUR)
STAFF COSTS			
DIRECT COSTS			
Travel, Accommodation, Subsistence			
GENERAL ADMINISTRATION COSTS Communications – tel, fax, e-mail, mail, courier, etc. Office supplies Costs of photocopying documents			
Totals			

Transfers between headings of eligible costs are allowed, „provided that this adjustment of expenditure does not affect implementation of the action and the transfer between items does not exceed 10% of the amount of each category of costs for which the transfer is intended." (Article I.3.4 of the AGENCY AGREEMENT)

Document 5.

6.7. Tasks and questions

How can you define project budget?

Why is effective cost monitoring important?

What basic project costs can be identified?

Which eu organization is in charge of EU grants?

What principles of grant awarding do we know?

What cost categories do we work with in EU projects?

What can be done if project costs overrun?

Key
1C, 2E, 3A, 4H, 5D, 6B, 7J, 8I, 9G, 10F

7. QUALITY ASSURANCE AND QUALITY ENHANCEMENT

7.1. Lead-in

What does the quality of education mean to you? Answer the following questions:

– What was your most relevant quality-related experience at the university?

– Is your opinion considered at the university?

– Is there any action to follow?

– In what context is the issue of quality raised at the university?

– Do you ever discuss quality with your peers in informal contexts?

– Do you get any help from your institution to improve?

– How do you think the quality of higher education can be enhanced?

7.2. What is quality?

It is well-known that quality in education in general and in higher education in particular is a problematic issue and it has many specific features. In its broadest meaning in non-educational contexts, „quality" is a generic term used to describe the „goodness" or the „badness" of a product. In the educational context it cannot be related to one tangible product. It may describe several things including the „quality" of university staff, students, infrastructure and teaching programmes.

Another problem with quality in education is that it is retrospective, meaning that it refers to past achievements and practices by building on statistical data describing past performance. However, it is agreed by educational experts and researchers that quality of education should emphasise the future instead of the past. Its goal should be improvement, enhancement and change for the better. A third problem with quality in education is its external top-down approach. In this procedure quality assurance agencies and organizations formally check whether or not the given university is fulfilling its main role as educator and research centre.

7.3. Quality circles

Quality circles are essential to the success of projects. They can be a solution to the previously mentioned problems with quality. They have become important for us because quality circles, in general, represent participatory management techniques. They are primarily used in industries to help employees with improving quality and solving problems related to theri own work. Quality circle members regularly meet, brainstorm and share ideas related to their own work including product improvement, employee training and working conditions.

It is also important that the primary aim of quality circles is not to describe the actual quality of a product or of anybody's work, but to improve all these factors. From a historical perspective quality circles are usually associated with Japanese and American management and production systems of the post-war era. The idea of quality circles was introduced by W. Edwards Deming, the father of modern quality control systems, a statistician for the U.S. government. In his opinion workers of companies should get a more substantial share of quality control and they also should be educated in quality control techniques. Rather than inspecting ready-made products for defects, he suggested to use quality circles to prevent defects during production. Deming's quality circles were means by which workers were encouraged to use their knowledge and practical experience for the benefit of the whole company.

After these early beginnings of the 1940s the practice of quality circles spread rapidly, primarily in the U.S. and in Japan in the 1990s. The SPEAQ (Sharing Practices in Enhancing and Assuring Qualiy) project also aims to fulfil this new approach to quality in higher education. The project collects and analyzes data from different stakeholders, representing three quality circles in higher education. As a result, quality managers, teachers and students think together and share ideas about quality in education in order to improve it.

7.4. How to manage project quality?

People might have different views on what makes a project a quality project. The generally agreed parameters to project quality (success) are that it delivers the desired outcomes on time and within budget. We have seen in the previous chapters that **good planning, effective communication** and **appropriate stakeholder management** are key factors to project success.

Another key success factor is **good measurement**. Early in the process it is important to identify the key outcomes (outputs, deliverables) of the project and how it can be measured whether they have been delivered. Qualitative and quantitative measurements are equally important at individual, team and project levels.

Good review mechanisms go along with measurement. Successful project managers and/or quality managers regularly review progress against the schedule, budget and quality elements of the project. These reviews allow problems to be identified early so that corrective action can be taken. Reviews also help team members to learn and improve their skills.

Measurement and review are important, but they are only effective if **immediate action** is taken. Simple issues can be addressed right away. More complex problems need to be added to the project plan and resources should be allocated to solve them.

7.5. Quality plan

When it comes to project quality, not only the quality of the deliveries matter. The processes or activities that produce deliverables should also meet certain quality requirements.

As a principle, if the processes and activities that produce the deliverables do not adhere to their own quality standards (process quality standards), then there is a high probability that deliverables will not meet the delivery quality standards.

To address all the quality requirements, standards, and quality assurance mechanisms in a project, a document called „**project quality plan**" is developed by the project team. Project quality plan is one of the mandatory documents for any type of project.

Depending on the type of the project, the components or the areas addressed by a quality plan may vary. However, there are some components that can be found in any type of quality plan. These are as follows:

– **Responsibility of Management:** This part of the quality plan describes how the management is responsible for achieving the project quality.

– **Document Management and Control:** Docmuents are the main method of communication in project management. Documents are used for communication between the team members, project management, senior management, and the client. Therefore, the project quality plan should describe a way how to manage and control the documents used in the project.

– **Development Control:** Once the project starts, all the processes, procedures, and activities should be closely monitored and measured.

– **Testing and Quality Assurance:** This is the element which describes the main quality assurance functions of the project. This section should clearly identify the quality objectives for the project and the approach to achieve them. .

– **Quality Audits:** For every project, regardless of its size or the nature, there should be periodic quality audits to measure the adherence to the quality standards. These audits can be done by an internal or an external team.

– **Training Requirements:** Every project team requires some kind of training before the project commences. For this, a skill gap analysis is done to identify the training requirements at the project initiation phase. The project quality plan should indicate the training requirements to fill the gaps.

7.6. Total Quality Management

Total Quality Management (TQM) is an integrative philosophy of management for continuously improving the quality of products and processes.

The key principles of the total quality management are presented in

– Management commitment – Plan-Do-Check-Act cycle,
– Employee empowerment – training, measurement and recognition, excellence teams etc.,
– Fact-based decision making – statistical process control, other statistical tools,
– Continuous improvement – systematic measurement, crossfunctional process management etc.,
– Customer focus – supplier partnership, customer driven standards etc.

7.7. SPEAQ Project QM Questionnaire

The quality questions were grouped into three broader areas, which were as follow:

– What does quality mean to you?
– Quality culture at your institution
– Improving quality.

What quality means to you

– What in your opinion are the elements of a good institution/ programme/course?
– What makes your experience as a professor/manager a valuable one?

- What is the most rewarding learning experience you have had on your programme/course? Say, why it was very rewarding.
- What do you understand by the term quality within your university context?
- How do you make sure your courses are coherent within the degree programme?
- Can you provide any examples of good practice in your institution?

Quality culture at your institution

- Do you have a voice within your university? Are you listened to? If so, how is your opinion heard/acted upon? Where is your voice heard? By whom?
- In what contexts, both formal and informal, is quality/teaching practice/learning experience discussed in your programme/institution?
- Is quality a daily matter for you, or something, which occurs only sporadically?
- Is quality something, which is imposed externally? How do you know what works well in your practice? What do you think you do well in your department that other departments can learn from?
- Who are the quality managers in your institution?
- What are the particular features of your institution, which would or should be taken into consideration when dealing with quality issues?

Improving quality

- How can the learning experience be enhanced?
- What can you contribute to enhancing the learning experience?
- What is in place for future developments in quality?
- What would you like to improve in the study experience and how would you do it?
- What do you think a quality manager does/should do to improve quality?
- How do quality processes in your institution reflect changes/trends in higher education?

7.8. Tasks and questions

What is the difference between quality in educational and in non-educational contexts?

What do you know about W. Edwards Deming?

What are the quality circles good for?

What factors lead to project quality?

What is a Project Quality Plan?

Who is it developed by?

What are the components of a Project Quality Plan?

What do the letters TQM stand for?

8. WHAT CAN GO WRONG? RISK MANAGEMENT

8.1. Lead-in

What would you do if the following problems occurred in your project? Match the problems with their possible solutions.

1	lack of money	A	improve inner and external communication flow
2	running behind time	B	request additional resources from sponsor
3	non-realistic project goals	C	interview and hire new personnel
4	staff shortage	D	rescheduling the project
5	poor management skills	E	renegotiate project goals
6	poor communication	F	discuss the new issues at a staff meeting
7	too many changes	G	design and implement a training programme
8	lack of flexibility	H	implementing a top-down management style

8. chart

8.2. Risk management

It is a fact and not a saying that all projects carry risks. This is why **project risk management** is an important aspect of project management. Project risk can be defined as **an unforeseen event or activity** that can impact the project's progress, result or outcome in a positive or negative way. A risk can be assessed using two factors:

impact (seriousness) and probability (the likelihood of occurrence). If a problem is diagnosed as serious and is very likely to occur it has the potential to ruin the project.

Risk management is the **identification, assessment, and prioritization of risks** followed by coordinated and economical application of resources **to minimize, monitor** and **control** the probability and/or impact of unfortunate events. It is also important to seize new opportunities.

In order to avoid „fire fighting", risk management has to be part of the project from the very beginning. It should also be included in project meetings and in staff training programmes.

The first step is the **identification** of risks. Initial identification of risks often takes the form of a **Risk Workshop**. Interviews with other – more experienced – people, risk brainstorming with project team members are among the methods to identify as many potential risks as possible.

Risk communication is also an important part of risk management. It is a good approach to include it in the agenda of project meetings and these occasions give team members an opportunity to discuss risks that occurred and report new ones as well.

There are risks in every project, but, at the same time, a project can open up **new opportunities** as well. Some of these uncertain events may be beneficial for the project and can make it more efficient, better or more profitable. It is also one of the project manager's tasks to make use of these new opportunities.

Some risks have higher impact than others. This is why it is essential to **prioritise risks**. The criteria most project teams use include the consideration of the effects of a risk and the likelihood that the unforeseen event will occur. Project team members as well as the project manager should primarily focus on the big risks.

The next step of risk management is **risk analysis**, i.e. understanding the effects and the causes. At another level risk analysis involves the investigation of the entire project and looking at project outcomes, budget and time. After that a project manager may simulate situations with certain risks occurring and see how it will effect the project's key parametres.

There are **five ways** of dealing with risks, as outlined in the internationally recognized project management standard PRINCE 2. (HTTP://WWW.PRINCE2.COM/WHAT-IS-PRINCE2.ASP). These are as follows:

1. **Planning contingency** i.e. elaborating Plan B that will achieve the same result by a different route.

2. **Risk reduction**, i.e. take action to reduce either the likelihood or the impact of the risk.

3. **Transfer**, i.e. spreading the risk so that the consequences become less serious.

4. **Acceptance**, especially in case of minor risks, or, when the cost of dealing with them is too great.

5. **Prevention** which is the most common way of dealing with risks. It means to terminate the risk by doing things differently.

8.3. Risk categories and risk log

What kind of risks threaten our projects most often? Risks can be classified into 13 categories:

1. **Operational Risk:** Examples include failure to address priority conflicts, insufficient resources or the lack of proper training etc.

2. **Schedule Risk:** examples include failure to keep the deadlines or falling behind scheduled time.

3. **Budget Risk:** Wrong budget estimation or project scope expansion may lead to budget risks.

4. **Business Risk:** Non-availability of contracts or purchase order.

5. **Technical Environment Risk:** These are the risks related to the environment under which both project team and stakeholders work.

6. **Information Security Risk:** The risks related to the security of information.

7. **Programmatic Risks:** These are outside the control of the programme. E.g. government rule changes.

8. **Infrastructure Risk:** Improper planning of infrastructure/resources .

9. **Quality and Process Risk:** These risks occur for example when new employees allocated to the project are not trained in the quality processes and procedures.
10. **Resource Risk:** This risk depends on factors like schedule, staff, budget and facilities.
11. **Supplier Risk:** This type of risk may occur when some third party supplier is involved in the development of the project.
12. **Technology Risk:** It is related to the complete change in technology or introduction of a new technology.
13. **Technical Risk:** Failure of technical equipment.

In all projects risks should be recorded in a document, which is called **risk log.** It actually means a risk register.

A risk log is a risk management tool and it acts as a „warehouse" of all risks identified within the project and, for each risk, includes information such as risk probability, impact, counter-measures to be taken and the name of the „risk owner", i.e. the name of the project team member who is assigned to deal with it. The contents of the risk log should be reviewed throughout the lifecycle of the project.

8.4. Managing changes

It can be concluded from the nature of project risks that it is sometimes necessary to introduce changes in projects so as to adapt to new circumstances. The changes must be managed and communicated carefully to all parties involved.

The most common reasons for changes include indecision, changes in circumstances, new personnel, loss of resources, poor planning or added benefit.

Change request forms are used to have the changes approved by the sponsor. Request forms can be downloaded from a variety of project management websites, including. (WWW.PROJECTMANAGEMENT-DOCS.COM)

8.5. Tasks and question

Why is risk management an important part of project management activities?

How can project risk be defined? Is risk always a threat?

What factors are investigated when assessing project risks?

What phases does risk management consist of?

What ways are there to identify project risks?

How many ways of dealing with risks do we know? What are they?

What is PRINCE 2?

What risk categories do we know?

How is the risk register called? What information does it include?

Identify the most common reasons for project changes.

Listen to a word of advice from an expert on how to manage project troubles. What „bad" and „good" choices does a project manager have? (WWW.PROJECTMANAGER.COM/MANAGING-PROJECT-TROUBLES.PHP)

Key
1B, 2D, 3E, 4C, 5G, 6A, 7H, 8F

9. ALL ABOUT MONEY: BUDGETING

9.1. Lead-in

In general there are four categories of events. Study the list of events below and assign the individual items to the category they belong to.

Birthday party, Open-Air Theatrical festival, Product Launch Celebration, Winter Olympic Games, EXPO 14, St. Patrick's Day, Book Launch, Democratic Party Convention, International Opera Festival, wedding anniversary, Carpathian Basin Folk Dance Festival, University Degree Awarding Ceremony, Formula 1, housewarming party, project closing conference, picknicking

Leisure events	Cultural events	Personal event	Organizational event

9. chart

9.2. Project events

Organizational events

Based on their purpose and objectives organizational events include. commercial, political, charitable, sales events, product launches and expos.

Project events belong to the category of organizational events and they include a variety of small-scale and large-scale events organized at various stages of the project lifecycle. Project events most often include a kickoff meeting at the very beginning of the project. A large-scale closing event is for example a closing conference. Inbetween a number of workshops, seminars, project team meetings and, in case of larger projects project management or leadership meetings are organized.

Kickoff meeting

The Kickoff Meeting is the first meeting with the project team and the client of the project and serves other project planning purposes. This meeting introduces the members of the project team and the stakeholders and provides the opportunity to discuss the role of each team member and participant. A well-planned kickoff meeting can pave the way for a successful project.

Closing conference

In its most common definition the word „conference" denotes a meeting for consultation and discussion or for an exchange of views.

In project terminology closing conferences are large-scale events to review the project and celebrate its success. It is the time to evaluate the changes and the benefits the project has achieved. External stakeholders should be made part of the closing events and they should also assess the work and its impact. This is the occasion to thank all participants for their contribution and give them a project gift. Project gifts should be tasteful and as personal as possible including for example a framed photograph of the project team, an inscribed pen, pendrive or a desk ornament.

Workshops and seminars

Seminars are small group discussions of a particular topic. In projects for example learning about quality assessment could be a good seminar topic.

A workshop is a meeting or a series of meetings emphasising interaction and exchange of information among a usually small number of participants. In project context risk management workshops can be an example.

Project team meetings

They create a platform where team members can communicate with each other, share ideas, review progress, come to conclusions and, eventually, make decisions. Project team meetings also provide an opportunity to refocus on project goals and how to achieve them.

In order to be effective team meetings need to have a structure, i.e. there should be a focus, meeting objectives to be achieved and a strict agenda. During the meeting time should be kept, meaning that the meeting always should start and finish on time. Shorter meetings are more focussed and more effective. It is equally important to do good minutes for project records.

Project management meeting, also called leadership meeting

These types of events are typical for larger and more complex projects which can be characterized by several working groups. In this case opportunities should be provided for working group leaders to meet, review, report and focus on their own tasks, also to create an opportunity for synthesis. Effective meetings are motivating, make project work smooth and they also strengthen the bond between individual working groups, group leaders and the project management.

9.3. Event manager

The event manager is the person who plans and executes the event itself. Event managers and their teams are often invisible, i.e. they work and run the event behind-the-scenes. The event manager and

his/her team are experts at the creative, technical and logistical elements that help an event succeed. This includes event design, written and oral communication, logistics, budgeting, negotiation and, of course, client service. It is a multi-dimensional profession.

The stages of event management include
– Site surveying,
– Client Service,
– Brief clarification, informing attendees,
– Budget drafting,
– Cash flow management,
– Supply chain identification (catering, cleaning services),
– Procurement,
– Scheduling,
– Site design,
– Technical design,
– Health & Safety including the organization of First Aid Services,
– Risk management (development of Plan B).

Some Practical Tips for Event Managers:
– Always find out in advance if attendees have any special dietary needs (kosher, vegetarian).
– Clarify with speakers in advance if they need any special equipment for their presentations.
– Always include cultural and social programmes (sight-seeing, concerts, receptions, dinners etc.) which allow participants to
– mingle and have discussions informally.

9.4. Sample programme

SPEAQ 3rd partner meeting

University of Aveiro
14–15 December 2012

AGENDA

DAY 1
10.00–10.30   Introduction & welcome
Welcome from Ali and Gillian
Questions from the partners
(quality circle slide displayed in the background)

10.30–12.00   Ideas for year 2 projects
Work in pairs: look at your list of issues/project ideas you prepared before the meeting. Present it to your partner for 10mins, then swap over. The person listening should not interrupt the person talking. If you need more time, carry on for another 5 mins once each of you has had time to present their ideas.

Work on your own: identify your best ideas (ideally no more than 3) and present them to group

12.00–12.30   Anca's project at Babes-Bolyai University
Anca and Iulia will give a brief presentation of their project and where they have done so far

12.30–13.30   LUNCH

13.30–13.45   Feedback from the morning

13.45–14.45   Project analysis
Group work: (3 groups: student-focused, staff-focused and teacher-focused projects)

Ask each other key questions:

– How are you going to do this?

– Why are you doing it?

– Who are you going to work with?

– What resources will you need?

– What's your proposed outcome?

14.45–15.15   BREAK

15.15–16.15   Dissemination

– Conference feedback

– Project dissemination event

– Journal article

– Short news report

– Other, incl. website

DAY 2
10.00–11.00   Action plan

– The Basecamp calendar and your key dates

– Project deadlines

– Work in pairs to create your project to-do list and feedback to
  the group

11.00–11.30   Evaluation summary
Comments on the meetings, key issues, questions, etc.

11.30–12.00   Finance

12.00–12.30   Conclusion
Go back to questions raised at the start of day 1 – have all the questions
been answered?

12.30   LUNCH

9. 5. TASKS AND QUESTIONS

What event categories do you know?

What category do project events belong to?

What are the characteristics of kickoff meetings?

Could you give a definition of the word conference?

How can a project closing conference be described?

What are the similarities and the differences between seminars and workshops?

What is the purpose of project team meetings?

Why are project management meetings necessary to organize?

Who is the event manager? What are his/her tasks?

What practical issues need to be considered when organizing project events?

Key

Leisure events	Cultural events	Personal event	Organizational event
Winter Olympic Games	Open-Air Theatrical Festival	Birthday party	Product Launch Celebration
Formula 1	St. Patrick's Day	Wedding anniversary	EXPO 14
School picknicking	Book Launch	Wedding reception	Democratic Party Convention
	International Opera Festival	Housewarming party	University Degree Awarding Ceremony
	Carpathian Basin Folk Dance Festival		Project closing conference

10. chart

10. TASKS, QUESTIONS AND QUIZZES

10.1. Task 1

Match the following project-related words with their definitions:

	Word		Definition
1	Project team members	A	The means by which a particular result is delivered using specified resources within a set timeframe.
2	Project	B	The Education, Audiovisual and Culture Executive Agency.
3	Feasibility study	C	These projects produce knowledge.
4	EACEA	D	An analysis and evaluation of a proposed project to determine if it is feasible technically and within the estimated costs.
5	Stakeholders	E	People who work toward a common goal and share responsibilites.
6	Research project	F	People, who are affected by or who affect project work.
7	Audit	G	A prediction of the costs associated with a particular project.
8	Budget	H	It is used to measure the adherence to the quality standards.
9	TQM	I	An integrative philosophy of management for continuously improving the quality of products and processes.
10	Risk management	J	An unforeseen event or activity that can impact the project's progress, result or outcome.
11	Minutes	K	The identification, assessment, and prioritization of risks.
12	Risk	L	Official note that records comments and decisions of meetings.

11. chart

10.2. Task 2

Compare and contrast the two pictures by answering the questions.

– What project events can be seen in the pictures?

– What are the participants doing?

– How do they feel about the project? About the event?

– Is there anyone to facilitate and control what's going on?

1. picture

2. picture

10. 3. Close-test

Add the missing words to the following text.

Projects .... the mechanism by which organizations and individuals change and .... to take advantage of new opportunities or counter threats. In a .... in which business competitiveness is based ...... a search for new products and ways to ...... things, every individual can improve their prospects by thinking: Where is the project ...... my current situation?

10.4. Quiz

1. Project lifetime is also called
  A) lifecycle   B) lifespan
  C) lifeline   D) life story

2. Project activities are often grouped as
  A) teams   B) working groups
  C) work packages   D) portfolios

3. EU programmes are managed by the
  A) EC Directorates-General   B) European Parliament
  C) European Commission Agencies D) European Council

4. The LEONARDO Programmes are aimed at improving
  A) primary education   B) vocational education
  C) audiovisual education   D) higher education

5. Sir Christopher Wren designed
  A) The Tower   B) Buckingham Palace
  C) St. Paul's Cathedral   D) Westminster Abbey

6. A list of project activities displayed against time is called
  A) Gantt chart   B) pie chart
  C) Basecamp   D) organizational chart

7. Fayolism is
   A) project management tool   B) project management theory
   C) project management software   D) project management centre

8. The phase in which the deliverables do physically come into
   existence is
   A) Dissemination   B) Initiation
   C) Desig   D) Implementation

9. The phase when the responsibility for the project outcome is
   getting transferred from the project team onto the users' team.
   A) Closure   B) Monitoring
   C) Initiation   D) Implementation

10. Project team members have
    A) many friends   B) a lot of money
    C) a strong sense of identity   D) physical strength

11. An ideal project team has .... members.
    A) 3–5   B) 5–7
    C) 7–9   D) 10–12

12. The two resources which are indispensable for the success of
    every project team.
    A) time and talent   B) time and money
    C) talent and money   D) time and money

13. The .... are also called change agents.
    A) project assistants   B) stakeholders
    C) client   D) project managers

14. Indirect costs are a maximum of ....% of all project costs.
    A) 10   B) 5
    C) 20   D) 7

15. Applicants should base staff costs on
   A) real daily rates   B) annual salaries
   C) monthly salary   D) a lump sum

16. Costs entailed by contracts with the participation of an external
    body, organisation or individual.
   A) staff costs   B) subcontracting costs
   C) indirect costs   D) subsistence costs

17. Quality assessment in higher edcucation means to look at the
    ....
   A) quality of programmes   B) quality of staff
   C) fulfillment of the role of universities as educator and researcher
   D) quality of infrastructure

18. Quality circles were first used in
   A) industries   B) communication
   C) agriculture   D) services

19. The project quality plan is developed by the
   A) project team   B) project assistant
   C) manager   D) stakeholders

20. PRINCE 2 is an international
   A) project management standard   B) quality management tool
   C) risk management type   D) project management theory

21. Risk log is a
   A) risk logistics   B) risk register
   C) contingency plan   D) problem

22. Small group discussions of a particular topic are a
   A) kickoff meeting   B) workshop
   C) seminar   D) presentation

Key

10.1. 1E, 2A, 3D, 4B, 5F, 6C, 7H, 8G, 9I,, 10K, 11L, 12J

10.3. are, adapt, world, on, do, in

10.4. 1A, 2C, 3C, 4B, 5C, 6A, 7B, 8D, 9A, 10C, 11B, 12A, 13D, 14D, 15A, 16B, 17C, 18A, 19A, 20A, 21B, 22C

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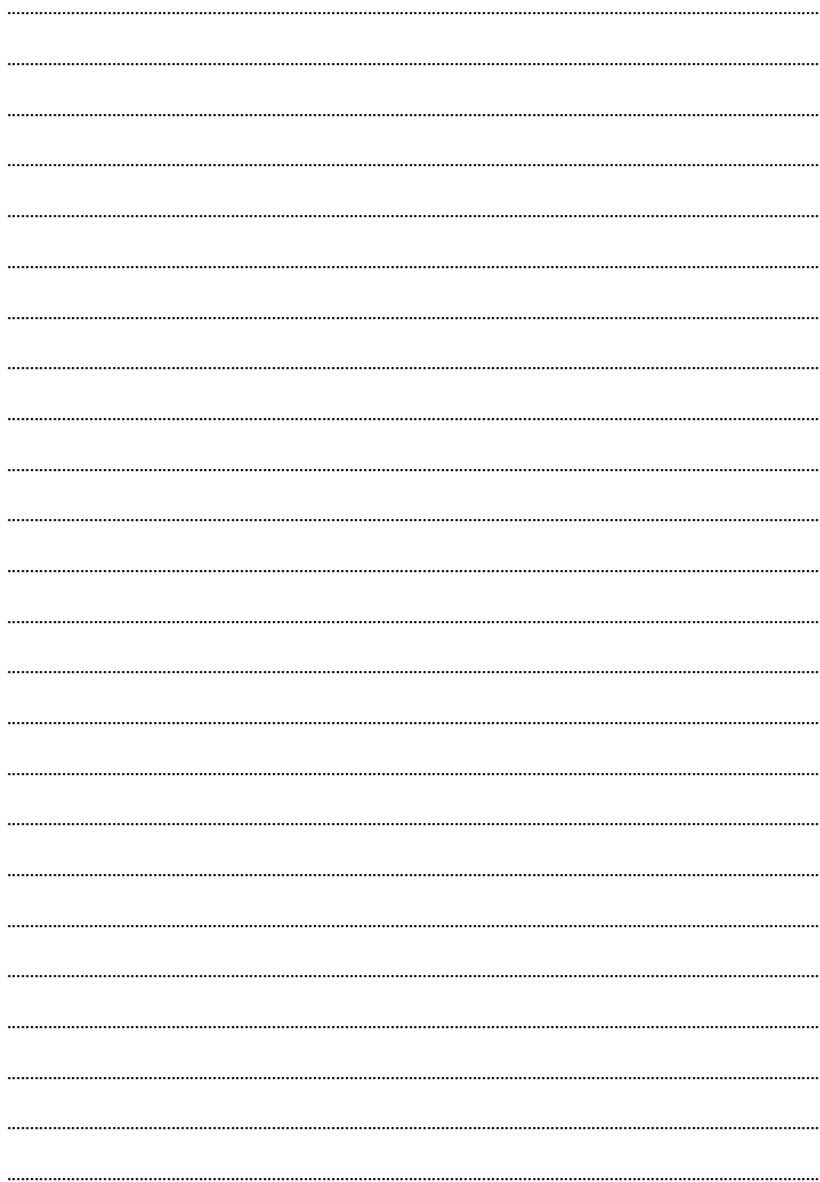
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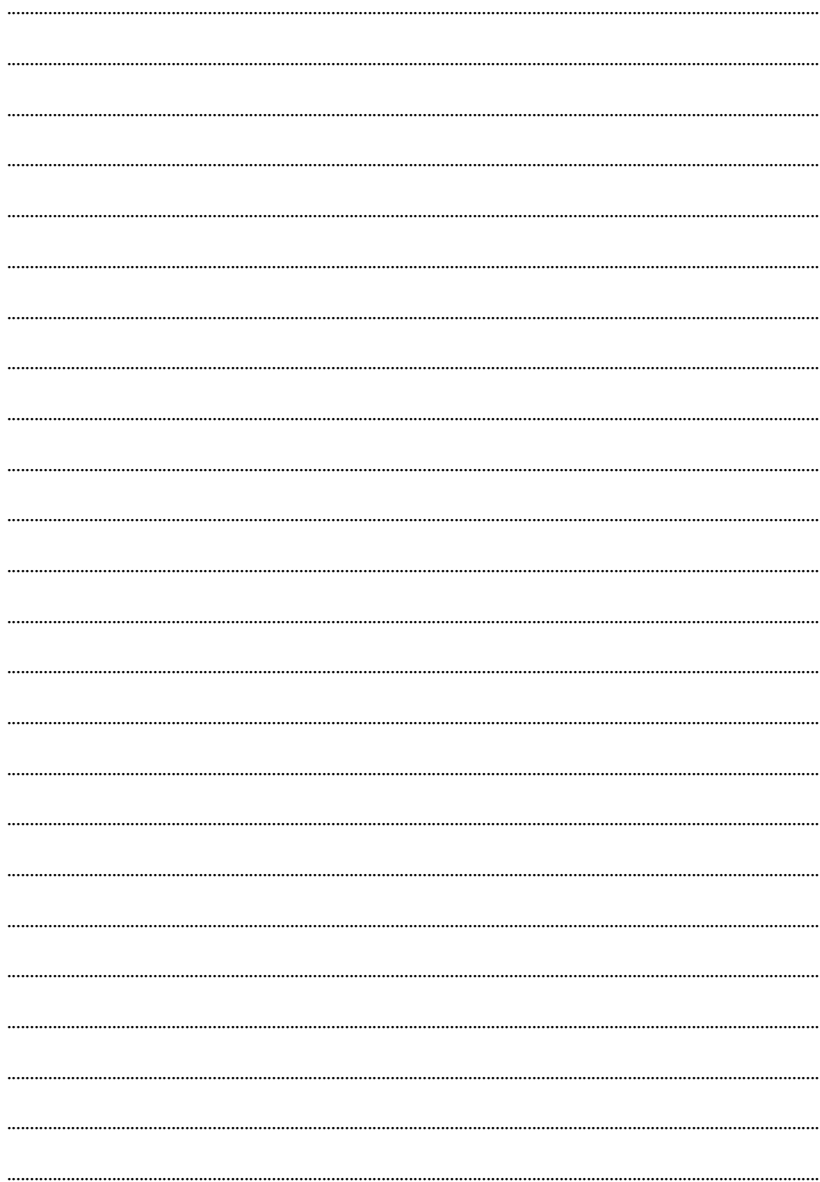Deeprose, Donna: Project Management. 2002

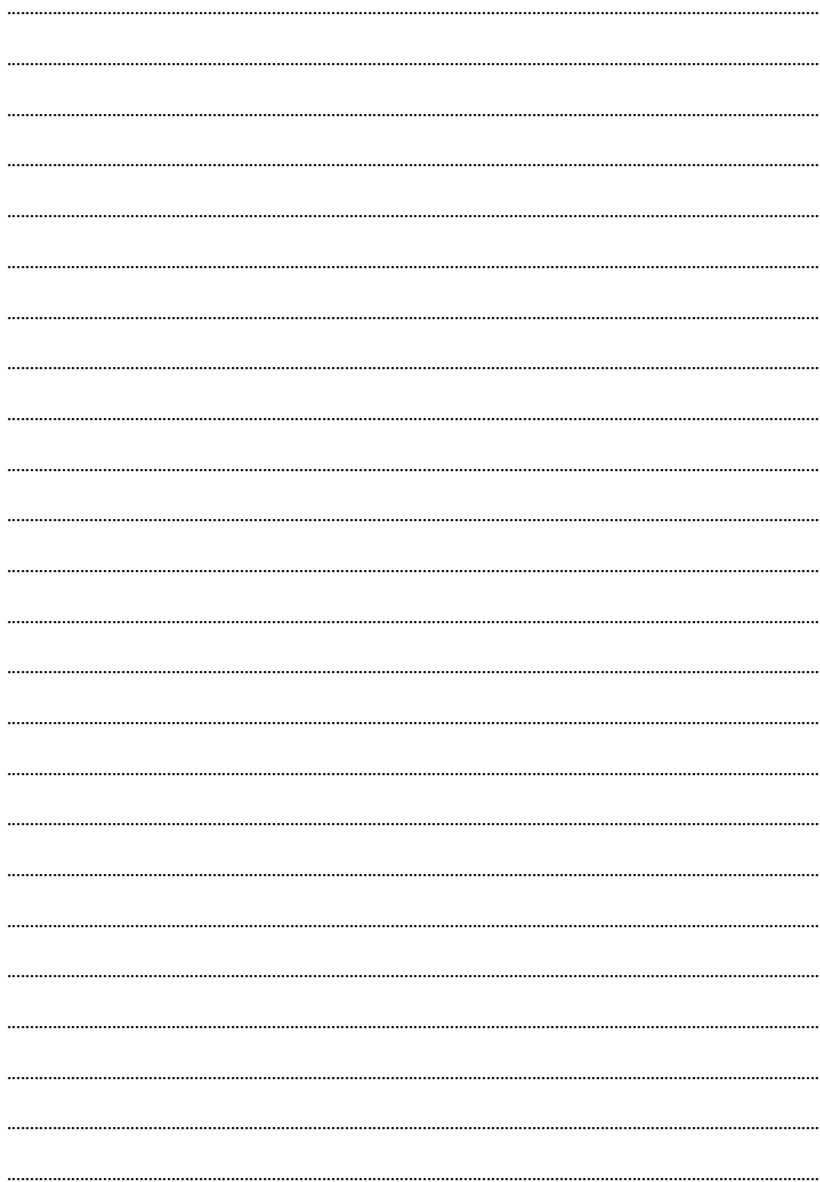Hobbs, Peter: Project Management. Dorling Kindersley, 2009

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