

Documentation template package for project managers in the area of education within the Project Manager 250+ project

What is the "Package" and what it is good for

It is a set of 23 forms for project management support in schools and education institutes. Each form is commented to maximally simplify its use. Additionally, each form comes with a template of a completed document.

The forms are a part of project documentation and are used to record important decisions (e.g. Identification project sheet), for planning (e.g. WBS), for documenting various analyses and business processes (e.g. Project target group analysis, transfer protocol).

None of the tools (represented by the appropriate form) represent a dogma. The offered template form can be suitably adjusted to each specific project and situation.

When to use the "Package"

If you have decided to realise a project, it is a good idea to read this introduction and subsequently browse through the offered forms and decide whether you wish to use the package or not. If yes, then for large and complex projects it is a good idea to use all or at least most of the offered tools, since they are mutually interlinked and are only complete when used together. The table below lists three basic categories of recommendations for using tools/forms for small and large projects:

- A: must be used,
- B: should be used,
- C: may be used.

It is necessary to consider the extent and complexity of each individual project (small/large) and find a suitable set of forms/tools for managing your project:

Project phases	Form – tool	Recommendations for a small project	Recommendations for a large project
Beginning	1-1 Logical Framework	A	A
	1-2 Project Target Group Analysis	C	B
	1-3 Stakeholders' Register	B	A
	1-4 Project Purpose	C	C
	1-5 Project Identification Sheet (ILP)	A	A
Preparation – Planning	2-1 WBS (Work Breakdown Structure)	A	A
	2-2 Schedule	A	A
	2-3 Project Budget and Financial Plan	B	A
	2-4 Responsibility Matrix	C	B
	2-5 Organisational Structure	B	A
	2-6 Risk Register	B	A
	2-7 Communication Plan	B	A
	2-8 Cost-Benefit Analysis (CBA)	C	C
	2-9 Document for the Project Team Kick-off Meeting	C	B

Implementation	3-1 Report	C	A
	3-2 Issue Log	C	C
	3-3 Lessons Log	C	C
	3-4 Acceptance Report	A	A
	3-5 Handover Protocol	A	A
	3-6 Change Request	B	A
	3-7 Meeting Minutes	A	A
Completion	4-1 Lessons Learned	B	B
	4-2 Project Evaluation	B	A

What and how to use the forms from the "Package"

The following diagram illustrates the relations between individual documents and the project management cycle. This is separated to the pre-project, project and post-project phase. The Package contains forms only used in the project phase, which are divided into:

1. Commencement of the project
2. Project preparation – planning
3. Project implementation
4. Project completion

Note: Some documents used within the Commencement of the project may originate (and often originate) from the pre-project phase, e.g. the Logical Framework.

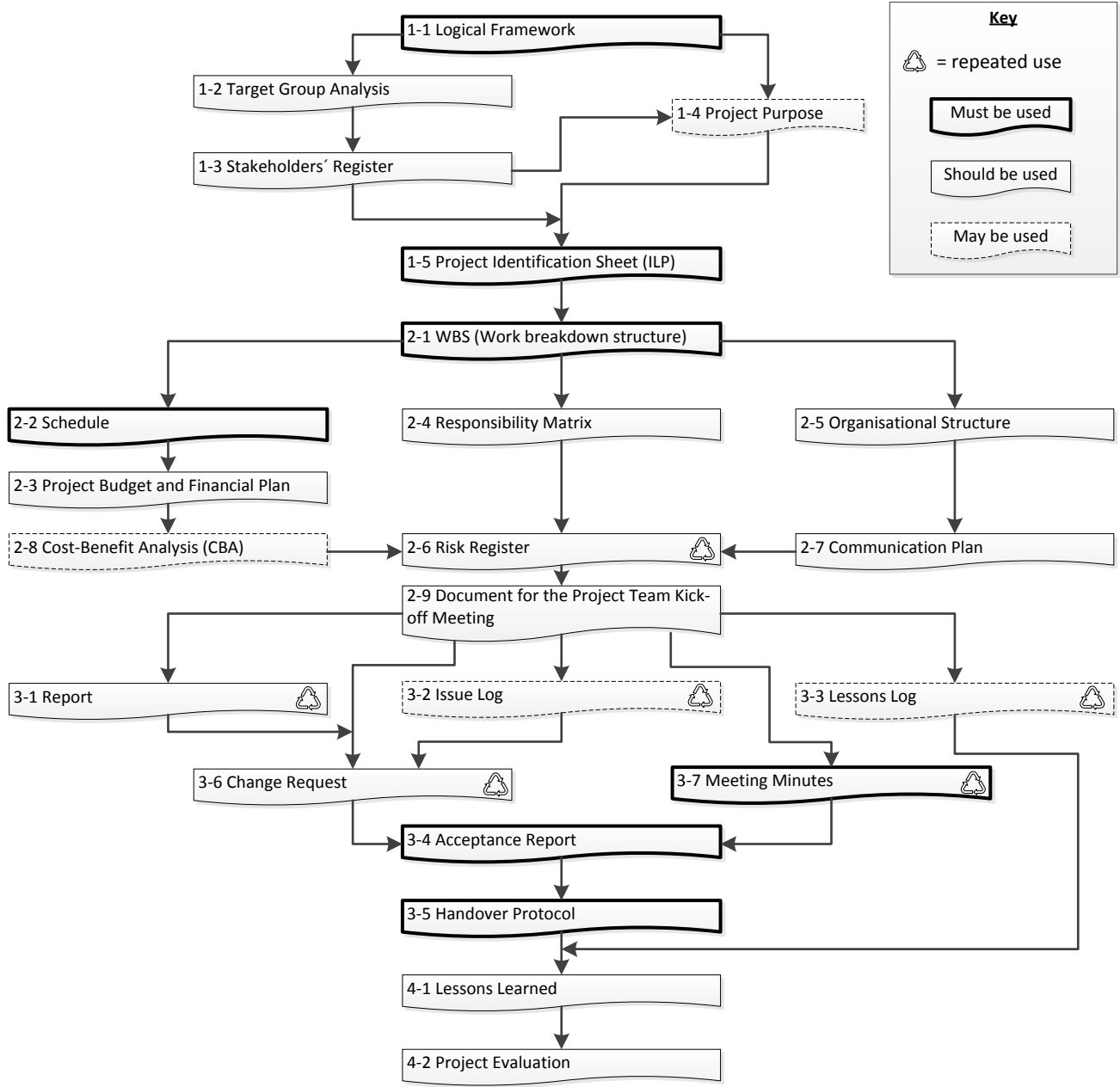
Individual forms/tools are listed in the usual order of their appearance or use (some are used several times, others only once).

Start-up

Preparation – Planning

Implementation

Completion



Explanatory dictionary of the Package

The project team and reviewers of the Package have selected a list of terms to facilitate the understanding of the text and entered them into the following summary:

Seq. no.	Term	Explanation
1	Cost-Benefit Analysis (CBA)	Cost-Benefit Analysis is a practical tool for answering the fundamental question for each project co-financed from public resources : "What will the realisation of the project bring to society as a whole and what will it take from it?" To obtain more detailed information about the subject, we recommend visiting, e.g. www.sroi.cz – a website dedicated to Social Return of Investment (SROI).
2	Cost-Benefit Analysis (CBA) – pure impact	How much of the impact (in percentage) would occur even if the project wasn't realised (dead weight). Which part of the impact will be participated in by other organisations or individuals (other influences). Cleaning the impact by removing dead weight and other influences result in pure impact – an impact which has been caused purely by the activities of the project.
3	Cost-Benefit Analysis (CBA) – impact attenuation	The impact attenuation is the ratio used to reduce the value of the pure impact in the second and subsequent years after the end of the realisation.
4	Target group	The target group of the project is the group of individuals or organisations which will use the outputs of the project. These are included in the stakeholders.
5	Target group analysis	Description – number of members, demographic characteristics (age, gender, education, etc.), number of members participating in the project. Real needs of the target group and the problems it needs to face. Motivation of the target group to participate in the project.
6	Financial plan	The financial plan consists of a plan for drawing down expenses and a resource plan to cover the expenses. The plan for drawing down expenses is a breakdown of project expenses over a period of time, e.g. by months. The resource plan for covering expenses enables to plan and monitor the cash-flow and to determine what resources will be necessary to cover expenses in the individual months of the project.
7	Schedule	The time schedule of the project is a graphical output of time planning. The schedule described the duration of individual tasks, the sequence of tasks and when each task should occur. The schedule may include who should perform which task (or how resource-intensive the task is).
8	Project Identification Sheet (ILP)	The ILP is a document which contains the most important information about the project and defines the basic organisational structure.
9	Issue Log	The issue log is a list of open issues and

		problems which need to be resolved during realisation. These include problems and the activities required to solve them, which are above the extent of the planned work. Such pending issues must be tracked and assigned a priority along with a responsible person and date of resolution.
10	Communication plan	The purpose of the document is to specify the what (what information), why (for what reason), how (through which information channels), when (how often) and by who (who will be responsible) for project communication to the outside environment and within the project (with who).
11	Project success criterion	Success criteria are formulated at the commencement of the project (e.g. in the ILP) and are used to evaluate the project after the realisation phase.
12	Lessons learned	Lessons learned contain a structural summary of experiences obtained by the project team during the entire project cycle. It represents a valuable set of information for teams that will implement similar activities or projects.
13	Lessons log	This is a list of lessons from the project, learned by the project team during the entire project cycle. It serves as an easy-to-navigate description of positive or negative events, their impacts and recommendations for future projects.
14	Logical framework	The logical framework (logical framework matrix) is a formal definition of the project. It is a table containing four columns: Column 1 – column of project objectives, outputs and primary project activities; 2 – indicators of completion and resources for primary activities; 3 – areas for documenting indicators and a general time schedule for primary activities; 4 – primary prerequisites and risks.
15	Responsibility matrix	The responsibility matrix is a tool used to specify the responsibility of individual project team members in various parts of project outputs/activities (work packages).
16	Thought map	The thought map is a graphic depiction of the flow of thought, including all branching, rebounds and continuations. Here, we graphically depict the sequence of creation and use of forms.
17	Control meeting	Used to identify divergences from the plan and find methods to correct divergences.
18	Manager meeting	The objective is to make decisions – the log is used to document the decisions made.
19	Operative meeting	Used to quickly resolve one or several subjects – no written minutes are taken.
20	Resolution meeting	The objective is to find the best solution for a given problem – minutes usually have a standardised form.
21	Project	The project is the unique process of change comprising a range of coordinated and

		controlled activities carried out to reach the objective, which fulfils the specific given requirements, including time, cost and extent requirements/limitations. (One of several definitions.)
22	Acceptance report	Acceptance (handover) is a legal act of the client, who thus accepts the end of the work, part of the work or other performance and its correctness and quality, with the exception of reservations specified in the protocol. The acceptance report (protocol) is used to document the performance of the acceptance procedure.
23	Handover protocol	The handover protocol is used to formally confirm the transfer of project performance to the customer. This usually simply constitutes a confirmation of physical transfer, which provides the performance to the customer. The handover is significant for the deadlines specified in the contract – the deadline for expressing reservations and accepting the performance usually begins upon handover. The protocol needs to explicitly specify the subject of the handover in relation to the contract.
24	Risk register	The risk register is a tool for storing information about each given risk: especially the probability of occurrence, impact and others (see form). It is a live document, since risks may change, arise or disappear during the realisation of the project.
25	Risk	Risks are uncertain events which may occur and affect (usually negatively) the project or its objectives.
26	Project budget	The project budget specifies individual expenses/costs of the project in detail
27	Risk management	Risk management comprises the identification and evaluation of a risk, determining a reaction to the risk and monitoring new risks.
28	Status report	Report on the project status
29	Kick-off meeting	This is the first meeting of the project team, which starts the realisation of the project. It especially serves as a means of allowing the team members to know each other, presenting the project and its context and clarifying roles and responsibilities.
30	Project user	see target group.
31	Template form	Template forms are forms which are ready to be filled in, including commentary. The commentary contains the purpose of the form, who prepares the form and when, and the procedure for preparing the form.
32	WBS (Work Breakdown Structure)	Work Breakdown Structure (WBS) is presented as a structural decomposition of the project. This means that the project gradually deconstructs its outputs into the appropriate work packages realising these outputs. Since the WBS is also the plan of the project extent, the project management activities are also

		included in the structure.
33	Stakeholder	Stakeholders include every individual, group or organisation affected by the project, be it negatively, positively, directly, indirectly, intentionally or unintentionally, or which influences the project in any way.
34	Stakeholder – analysis	The aim of the stakeholders’ analysis is to realise the actual expectations of individuals and groups connected with the project in order to ensure satisfaction of the largest possible number of stakeholders. The analysis will output a matrix of influence vs. stance (positive, negative).
35	Stakeholder – management	Managing relationships with stakeholders is one of the main areas of project management since the stakeholders’ interests fundamentally influence the set-up and implementation of the project, and the project success depends on the stakeholders’ assessment.
36	Change – procedure	Changes usually occur during the realisation of projects. The project must react flexibly to these changes (either refuse them or realise them) and each change must be controlled and logged. To this end, the organisation should have a change management procedure.
37	Project management cycle	The cycle (service life) of the project comprises the pre-project, project and post-project phase. The project phase is divided into the following parts: project commencement, planning, realisation and completion.

Conclusion

The scheme described above and the manner of use of the forms/tools (some items are simple forms, others are used for relatively sophisticated project management tools) might not be suitable for all projects. Each project is specific and unique. The offered template form can be suitably adjusted to each specific project and situation. However, the specified procedure is fully in compliance and is based on international standards and good practices for the preparation and management of projects.

If you use a different process, there should be a serious reason to do so, and it is necessary to take care of the risks related to such alternative processes. Specifically, it is necessary to consider the impact of the absence of some of the forms/tools and whether you are capable of efficiently eliminating this impact. In this context, it seems to be preferable to slightly adjust the documents for the appropriate specifics of the given project.