

I Project Management

Project Management skills



TSI ref. 23SI05

- Planning
- Communication
- Delivering results
- Monitoring risks
- Managing resources



Project Management Life Cycle



TSI ref. 23SI05

- Phase 1: Initiation
- Phase 2: Planning
- Phase 3: Execution
- Phase 4: Monitoring
- Phase 5: Closing



Investment Projects



Investment Projects



TSI ref. 23SI05

- Investment projects are a fundamental factor in business development and economic growth as well as crucial for national and regional economic development as they promote innovation, create new jobs, and improve quality of life.
- An investment project is a detailed action plan that includes finances, risk management, project description, etc. and is aimed at capital investment with the goal of generating economic benefits.



Investment Projects



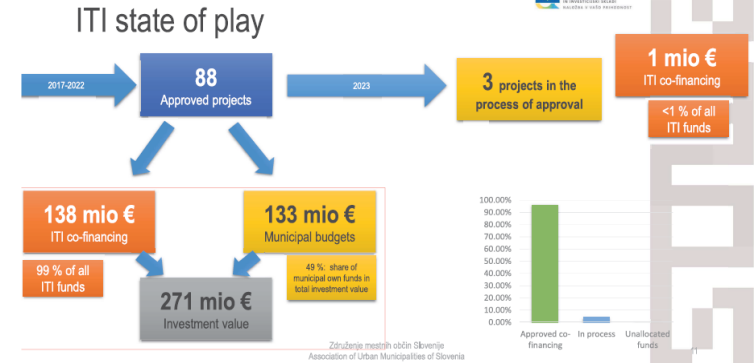
TSI ref. 23SI05

- Private sector investors evaluate projects using standard financial appraisals that focus on private financial returns.
- Economic appraisal, in turn, takes a broader view to include other benefits and costs to society, accounting for all resources used by the project, whether human, technological, or natural, and scales the value the project generates to all stakeholders, to determine whether society at large gains from the investment. The economic viability of a project can be seen as synonymous with sustainability, cohesion and growth in many respects.



You are the experts !!!

The Integrated Territorial Investments (ITI) mechanism is aimed at fulfilling the aims of sustainable urban strategies of urban municipalities with funding from the European Regional Development Fund and the EU Cohesion Fund. The Association of Urban Municipalities of Slovenia (ZMOS) acts as an intermediary in selecting ITI operations.



ITI PROJECTS IN SLOVENIA



Ljubljana – Cukerna Gallery (23 mio €, ITI 13 mio €)

Novo mesto – Main Square (7 mio €, ITI 4,5 mio €)



Koper – Smedela promenade revitalisation projects (17 mio €, ITI 8,5 mio €)



Celje – Generator / Tehnopark (8 mio €, ITI 4 mio €)



Funded by
the European Union

Main requirements:

- Clearly defined goals
- Detailed plans and budgets
- Compliance with laws and regulations

Investment Projects Management



What *exactly* are you trying to achieve?

How will you know when you've achieved it?

Is it genuinely possible to achieve it?

Does it contribute to your agency's revenue growth?

When do you want to achieve this by?

Project Management Smart Goals



Specific: The specifications are clear and exact.

Measurable: The outcome can be quantified or measured.

Achievable: The goal is realistic to achieve.

Relevant: The goal relates to the goals of a particular project or the larger goals within an organization.

Time-Bound: The goal includes a deadline or date by which success or failure will be determined.

Preparation:

- Preparing investment projects requires competence and experience, so this process is often carried out by specialists or consulting firms.
- Idea generation - formulating the initial idea and evaluating its feasibility. To generate a truly unique idea, you can use various methods and tools as a source of inspiration. It is also useful to talk to your target audience or clients to whom this project, product, or service will be directed.

Feasibility study:

- Project evaluation, including market analysis, economic benefit assessment, and risk analysis. This part will require more detailed analysis, reading, and research.

Efficiency assessment:

- involves analyzing the project's results and benefits to determine whether the project meets established goals and is economically justified.

Risk assessment:

- helps identify potential challenges and develop strategies to manage them, reducing the likelihood of project failure and ensuring its successful implementation.

Project planning:

- Setting goals, allocating resources, assessing risks, and creating a project schedule.
- It is very important to anticipate all possible scenarios, risks, and have several plans for different situations, as this will help you during critical situations since you will already have a plan and know how to act.

Implementation:

- Carrying out actions according to the established plan, continuous monitoring, and control.
- It is very important that your plan does not remain just a plan, it must be implemented exactly as planned. Of course, you need to consider the situation and adapt because if unforeseen circumstances occur, your previous plan may be unsuitable, and you should quickly change it to fit the new conditions.

Evaluation:

- Analyzing project results to assess its success, identify improvement opportunities, and provide recommendations for future initiatives. Such analysis can be useful in the future when seeking funding for other investment projects.

Public Investment Project/ Management

COMMUNITY INVESTMENT

Enter your sub headline here



Public Investment Management (PIM)



TSI ref. 23SI05

- What is being managed? PIM is designed to manage public investment projects.
- Define public investment, project, public infrastructure investment (part of PIM and total infrastructure investment), PPP (part of public infrastructure investment and PIM).
- Why and how is public investment being managed?
- Public investment is part of public expenditures.
- Basic features of a system for managing public investment projects.



Public Investment Management (PIM)



TSI ref. 23SI05

- Laws, rules, systems and processes used by sovereign nations (and sub-national governments), to mobilize revenue, allocate public funds, undertake public spending, account for funds and audit results.

- Broader than financial management
 - Policy Design
 - Budget Formulation
 - Budget Approval
 - Budget Execution
 - Accounting
 - External Audit and Evaluation

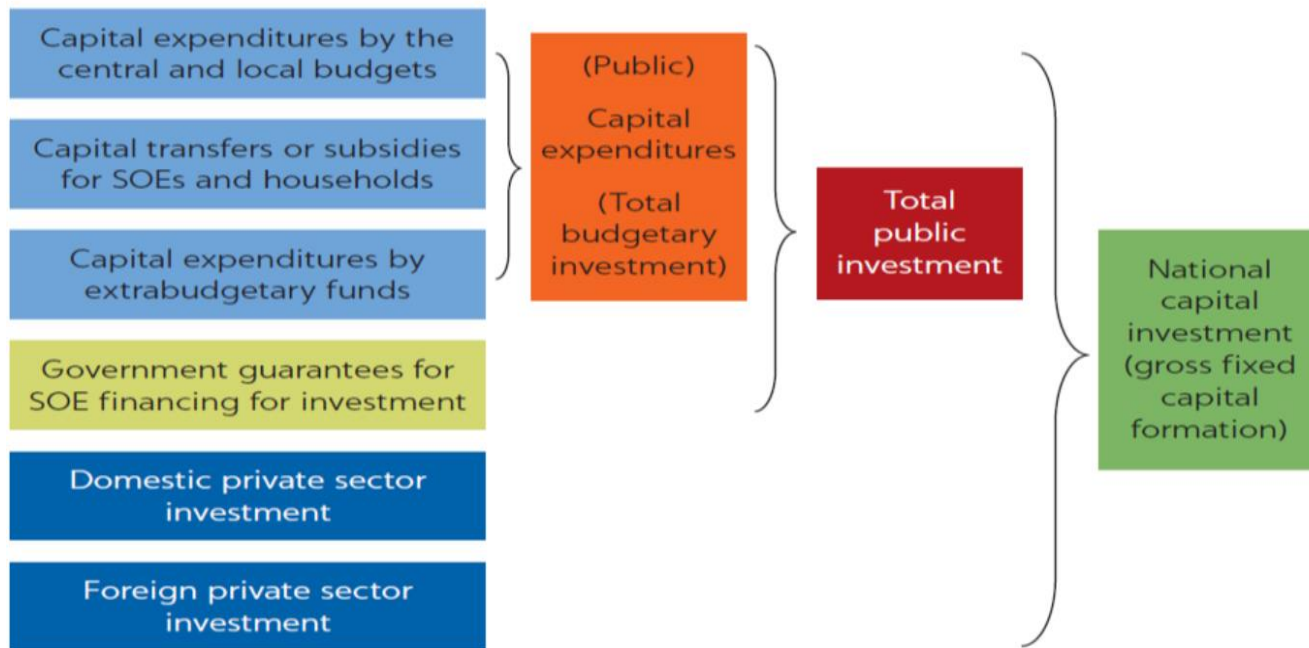


Public Investment Management (PIM)

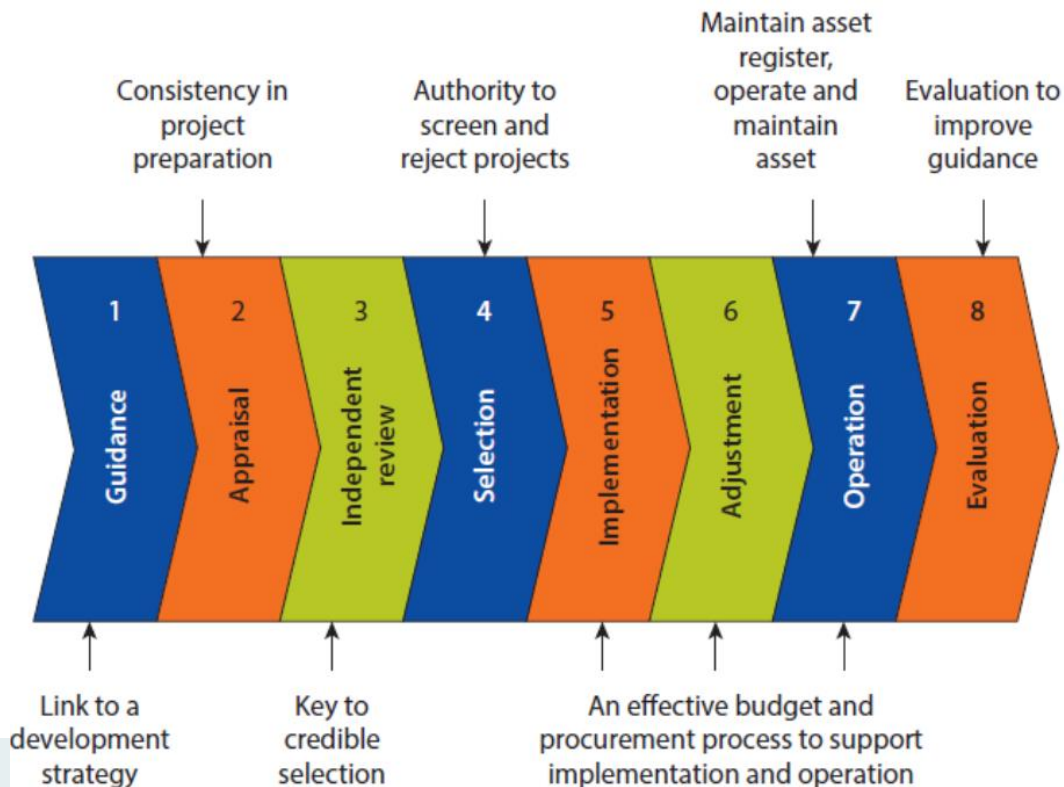


Public Investment Management (PIM)

Capital expenditures, public investment, and national capital investment



Public Investment Management (PIM)



PIM and Public Financial Management (PFM)



TSI ref. 23SI05

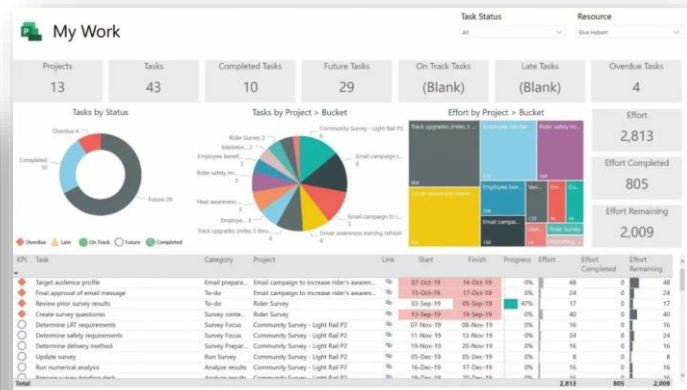
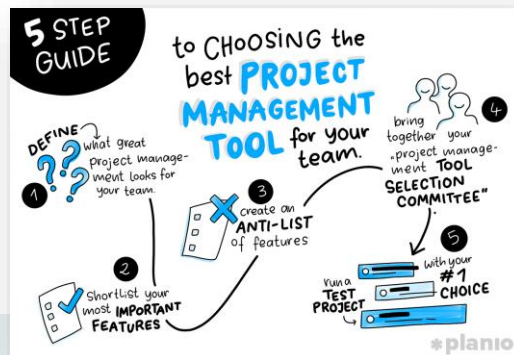
- What is being managed? PIM is designed to manage public investment projects.

LEVEL	OBJECTIVES OF PUBLIC FINANCIAL MANAGEMENT	IMPLICATIONS FOR PUBLIC INVESTMENT MANAGEMENT
Level I: aggregate fiscal discipline	Exercising effective control of the total budget and management of fiscal risks	Aggregate public investment spending planned within realistic resource ceilings and individual projects completed within budget
Level II: strategic allocation of resources	Planning and executing the budget in line with government priorities aimed at achieving policy objectives	Capital investment projects selected and budgeted in accordance with government's strategic priorities to address the most pressing problems or constraints
Level III: efficient service delivery	Using budgeted resources to achieve the best levels of public services within available resources	Capital investment projects evaluated to verify that they represent efficient and effective solutions to identified problems; that they are procured economically, implemented efficiently, and operated as planned



Project Management Tools

PM-Tools



Benefits of Using Project Management Tools



TSI ref. 23SI05

- **Increased efficiency** - simplify complicated workflows and automate repetitive tasks
- **Enhanced organization** - Organization is the backbone, PM tools help to stay organized
- **Work centralization** - information consolidated in one place and accessible to authorized stakeholders
- **Faster and improved collaboration** - features like file sharing, chat, and other forms of communication between teams, huge advantage among remote teams



Benefits of Using Project Management Tools



TSI ref. 23SI05

- **Improved resource management** – PM tools are project managers' eyes and ears (e. g. track team workloads, identify resource requirements, address bottlenecks)
- **Proactive risk mitigation** - bird's eye view of the project and its underlying activities
- **Data-driven insights** - track project performance, health, and status, critical metrics and benchmark performance
- **Transparency and accountability** - create a sense of ownership, updates and performance data
- **Resilience and adaptability** – PM tools scale with your needs



- Project management software for the public sector



L A N D T A G
B R A N D E N B U R G



Stadt Köln

Project Management Tool



TSI ref. 23SI05

- **Work packages**
- With the work packages you can easily create, assign and manage your work. Responsibilities and timings are visible to all project members. Filtering e.g. by open tasks, your own tasks or priorities makes your work easier.

The screenshot displays the OpenProject web interface. On the left, a sidebar shows navigation options like 'Work packages', 'All open', 'Assigned to me', etc. The main area is titled 'Work packages' and contains a table with columns: TYPE, ID, SUBJECT, STATUS, ASSIGNEE, and PRIORITY. The table lists various project items, including milestones and tasks, with their current status and assigned personnel. For example, a task 'Strassenbau Planung' is assigned to 'Stephan Strahlen' and is in 'New' status. To the right of the table, a detailed view of a selected task is shown, including its description and a map visualization.

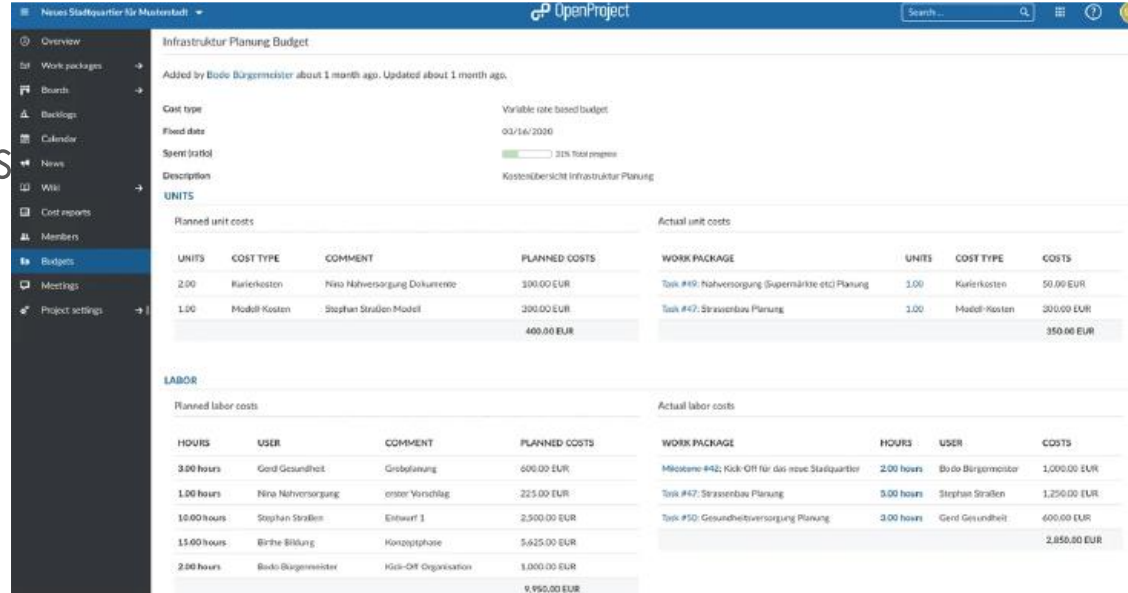
TYPE	ID	SUBJECT	STATUS	ASSIGNEE	PRIORITY
MILESTONE	42	Kick-Off für das neue Stadtquartier	Closed	Bodo Bürgermeister	High
TASK	43	Bauliche Beschaffenheiten prüfen	In progress	Ingo Ingenieur	Immediate
TASK	44	Besitz des potenziellen Baulands klären	Closed	Bodo Bürgermeister	Normal
TASK	45	Klärung Möglichkeit Fördermittel vom Bund	In progress	Friedrich Finanzen	Normal
PHASE	46	Infrastruktur planen	New	Bodo Bürgermeister	Normal
TASK	47	Strassenbau Planung	New	Stephan Strahlen	Normal
TASK	48	Kita Planung	New	Birthe Bildung	Normal
TASK	49	Nahversorgung (Supermärkte etc.) Planu...	New	Nina Nahversorgung	Low
TASK	50	Gesundheitsversorgung Planung	New	Gerd Gesundheit	Normal
MILESTONE	51	Meeting Planungskreis Infrastruktur	Scheduled	Planungskreis Infrastruktur	Normal
TASK	52	Einholung Genehmigung aller anderen Beh...	New	Ingo Ingenieur	Normal
MILESTONE	53	Baubeginn öffentliche Gebäude und Strass...	New	Bodo Bürgermeister	High



- Charts
- Plan and manage your projects and tasks collaboratively with the team. Keep track of important deadlines, manage dependencies and see what needs to be done next.



- **Budget planning**
- Keep an overview of project budgets and spent costs. Plan the costs for each project phase and see at a glance how much of the assigned budget has been spent.



Neues Stadtquartier für Musterstadt

OpenProject

Infrastruktur Planung Budget

Added by Bodo Bürgermeister about 1 month ago. Updated about 1 month ago.

Cost type: Variable rate based budget

Fixed date: 03/14/2020

Spent budget: 21% Total progress

Description: Kostenübersicht Infrastruktur Planung

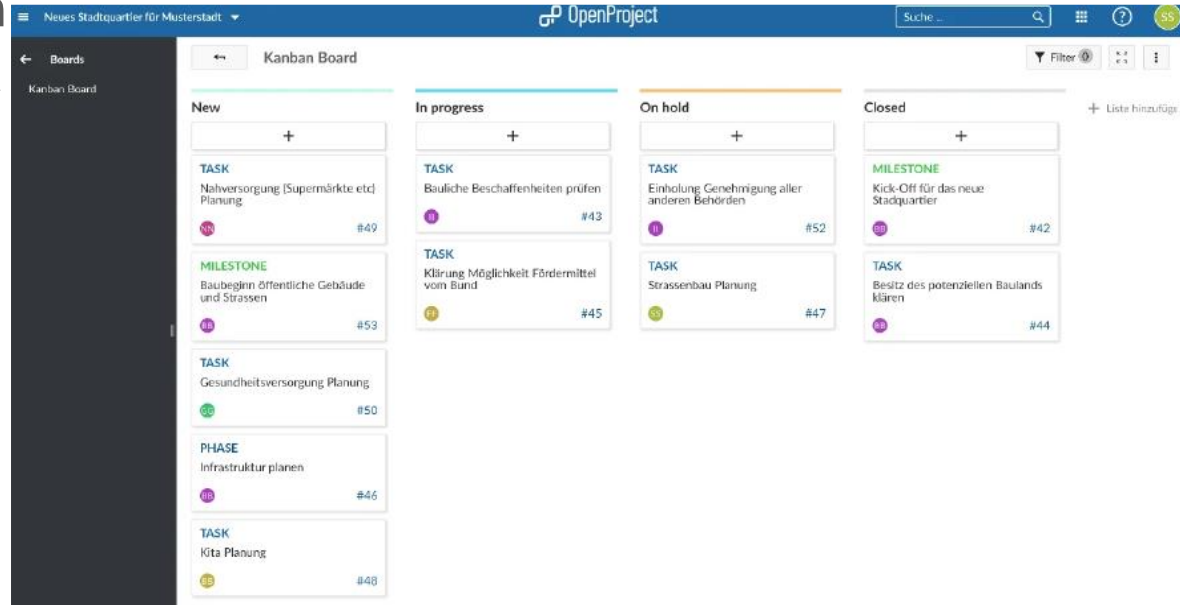
UNITS

Planned unit costs				Actual unit costs			
UNITS	COST TYPE	COMMENT	PLANNED COSTS	WORK PACKAGE	UNITS	COST TYPE	COSTS
2.00	Karierkosten	Nina Nahversorgung Dokumente	100.00 EUR	Task #19: Nahversorgung (Supermärkte etc) Planung	1.00	Karierkosten	50.00 EUR
1.00	Modell-Kosten	Stephan Straßen-Modell	300.00 EUR	Task #47: Strassenbau Planung	1.00	Modell-Kosten	300.00 EUR
			400.00 EUR				350.00 EUR

LABOR

Planned labor costs				Actual labor costs			
HOURS	USER	COMMENT	PLANNED COSTS	WORK PACKAGE	HOURS	USER	COSTS
3.00 hours	Gerd Gesundheit	Gedplanung	600.00 EUR	Milestone #42: Kick-Off für das neue Stadtquartier	2.00 hours	Bodo Bürgermeister	1,000.00 EUR
1.00 hours	Nina Nahversorgung	onster Vorschlag	225.00 EUR	Task #47: Strassenbau Planung	3.00 hours	Stephan Straßen	1,250.00 EUR
10.00 hours	Stephan Straßen	Entwurf 1	2,500.00 EUR	Task #50: Gesundheitsversorgung Planung	3.00 hours	Gerd Gesundheit	600.00 EUR
15.00 hours	Birthe Bildung	Konzeptphase	5,625.00 EUR				2,850.00 EUR
2.00 hours	Bodo Bürgermeister	Kick-Off Organisation	1,000.00 EUR				
			9,950.00 EUR				

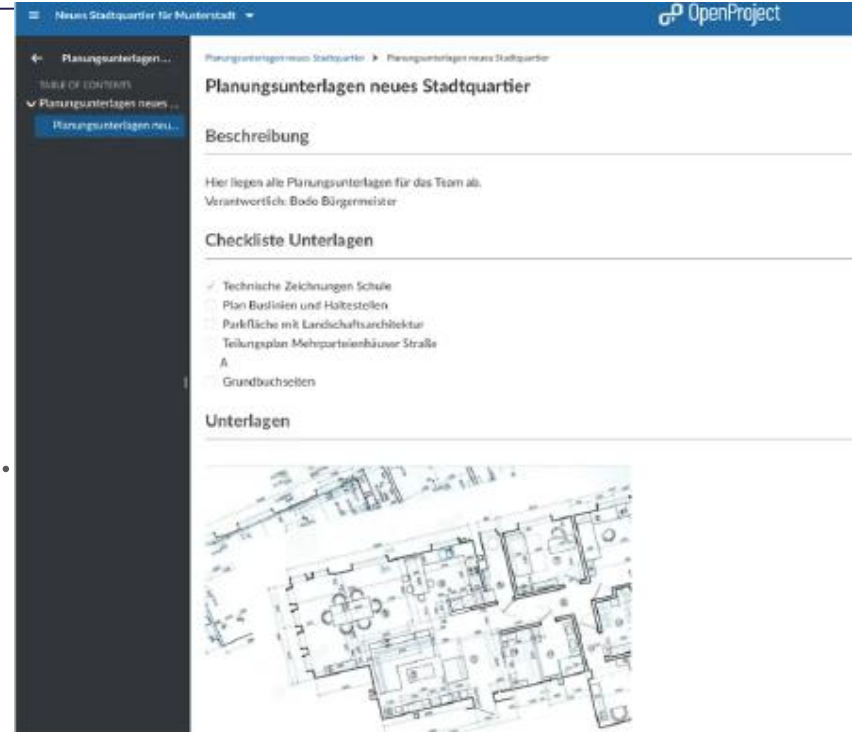
- **Boards**
- In agile boards you can easily control and track workflows. Implement processes and enable simple and intuitive tracking.



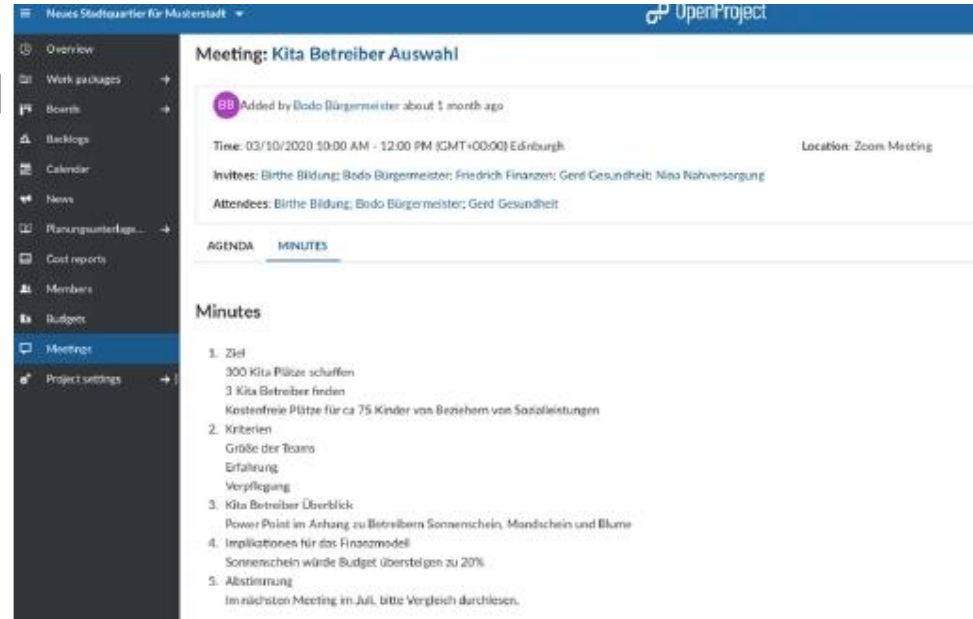
Project Management Tool



- **Content management**
- Manage project documentation, references, policies, user manuals, and more in one central location and create a knowledge base for your projects and share it with your team and other stakeholders.



- **Meetings**
- Send invites directly for meetings or calls. Agenda and minutes can be shared and edited by everyone. This way all information of the project is recorded.



Project Management Tool



Project Portfolio Management	Project Planning	Task management
Overview of entire project portfolio	Project objectives deliverables	Track the work and achieve results
Several projects - project structure with hierarchies	Detailed plan, project scope	Organize, prioritize and assign tasks
Status - Project list or Project dashboard	Team member's priorities and workload	Tasks and communication in one place
Budgeting	Product roadmap	Workflows
Time tracking	Share roadmap, release plan	Organization's needs
Project performance and allocated resources	Plan, visualize and communicate	Work package forms, workflows etc.
Costs for each project phase	Transparency	Standardize





Some features in a Live-Presentation

PM-Practice



Project Management

Project assignment

PROJECT PLAN TEMPLATE – EXAMPLE for Microsoft Word

PROJECT NAME	PROJECT DELIVERABLE	PROJECT MANAGER
SCOPE STATEMENT		
START DATE	01/02/2023	END DATE
PROJECT DURATION (in days)	85	OVERALL PROGRESS
37%		

WBS No.	TASK NAME	RESOURCE ASSIGNED	START DATE	END DATE	DURATION (in days)	STATUS
1	PROJECT CONCEPTION AND INITIATION		01/02	02/02	29	Complete
1.1	Project Charter	Chloe L.	01/02	01/11	10	Complete
1.1.1	Project Charter Revisions	Kennedy K.	01/02	01/11	5	Complete
1.2	Research	Alex B.	01/02	02/03	45	Complete
1.3	Stakeholders	Frank M.	01/10	01/20	11	Complete
1.4	Guidelines	Kennedy K.	01/14	01/29	14	Complete
1.5	Project Initiation	Jacob V.	01/19	02/01	19	Complete
2	PROJECT DEFINITION AND PLANNING		01/28	03/14	18	In Progress
2.1	Scope & Goal Setting	Frank M.	01/28	02/04	10	On Hold
2.2	Budget	Jacob V.	01/28	02/02	3	In Progress
2.3	Communication Plan	Valerie C.	02/04	02/12	9	Complete
2.4	Risk Management	Chloe L.	02/04	02/14	9	Complete

WBS No.	TASK NAME	RESOURCE ASSIGNED	START DATE	END DATE	DURATION (in days)	STATUS
3	PROJECT LAUNCH & EXECUTION		02/18	03/24	38	In Progress
3.1	Status & Tracking	Rebecca H.	02/18	02/20	3	In Progress
3.2	KPIs	Chloe L.	02/18	02/23	6	In Progress
3.2.1	Monitoring	Frank M.	02/18	02/24	9	In Progress
3.2.2	Forecast	Alex B.	02/21	02/23	3	Not Started
3.3	Project Updates	Emily H.	02/22	02/23	2	Not Started
3.3.1	Chart Updates	Kennedy K.	02/25	03/04	31	In Progress
4	PROJECT PERFORMANCE / MONITORING		02/25	03/26	31	In Progress
4.1	Project Objectives	Kennedy K.	02/25	02/28	4	In Progress
4.2	Quality Deliverables	Alex B.	02/26	03/03	7	On Hold
4.3	Effort & Cost Tracking	Jacob V.	02/26	03/06	11	Not Started
4.4	Project Performance	Chloe L.	03/03	03/26	24	Not Started

Bundesministerium
Finanzen

PROJEKTAUFTRAG „Management der praktischen Ausbildung in der Finanzverwaltung“ (Konzeptionsprojekt)

Projektstarttermin:
15.03.2023

Projektendtermin:
15.06.2023

Ausgangssituation:

Die Modernisierung der österreichischen Finanzverwaltung, die geplanten Neuaufnahmen (für die Verwendungsgruppen A1/v1, A2/v2 und A3/v3 sowie Steuer- und Verwaltungsassistenten/innen) und die Covid-Pandemie haben u.a. auch massive Auswirkungen auf die Aus- und Fortbildung der Mitarbeiter/innen in der Finanzverwaltung:

- Die Grundausbildung ist in der Grundausbildungsverordnung-BMF (BGBl. II Nr. 315/2020

Projektauftraggeber: Sektionschefin Dr. Angelika Schätz

Projektleitungsausschuss:

Vorsitz: Siegfried Manhal (FAÖ)
Stimmberechtigt: Heike Fetka-Blüthner (ZAÖ)
Alfred Hacker (ABB)
Edith Madlberger-Schmidt (PLAB)
Sabine Schloffer-Stamper (FAG)
Nicht stimmberechtigt: Vertreter/In Personalvertretung (ZAUS)

Projektmanager/in:

Projektleitung: Manfred Elmecker (FAÖ)

Projektteammitglieder:

- Einbeziehung aller Ämter (FAÖ, ZAÖ, FAG, ABB, PLB)
- Einbeziehung Bundesfinanzakademie
- Vertreter/innen Personalvertretung



Dr. Angelika Schätz
(Projektauftraggeberin)



Dr. Manfred Elmecker
(Projektleiter)

Project Management

Project assignment

TSI ref. 23SI05

 Bundesministerium
Finanzen

PROJECT ASSIGNMENT	
"Project title"	
Project start date :	Project end date:
Initial situation:	
Strategy reference (strategy/strategy program/impact goals):	
Project goals:	Non-project goals:
Main tasks (phases):	
Project client:	
Project Steering Committee: Chair: Eligible to vote: Not entitled to vote:	
Project Manager:	
Project team members:	
Signatures:	
(Project Client)	(Project Manager)
Date:	

PROJECT MILESTONE PLAN			
Milestone (Description)	Planned dates	Adapted plan dates	Actual dates

Process Management



What is process orientation?

- Process orientation means viewing and understanding the processes of an organization/project as a combination of processes or process chains.

What is process management?

- Process management includes coordinated activities in order to consistently align all processes with the strategy of an organization/project and to design, introduce, continuously optimize and control them efficiently.

Man, Machine, Material, Method, (m)Environment, Management, Measurability

- This process analysis method is used to look at various aspects and influences of a process and to identify potential problem areas. Process influences that are discovered during the analysis should be used as input for later process optimization.

Man

- The focus here is on the role and behavior of the people involved in the process. Their skills, training, motivation and working conditions are taken into account.

Machine

- This aspect refers to the technical devices and tools used in the process. It includes the efficiency, reliability and maintenance of the machines.

Material

- Factors influencing the process in relation to the material are raw materials, components or products that are used in the process. The quality, availability and storage of the materials play an important role.

Method

- The method refers to the working methods and procedures used in the process. This includes the efficiency, accuracy and standardization of the methods.

Environment

- This refers to the environment in which the process takes place. It includes the influences of external factors such as laws, regulations, customer requirements and competition.

Management

- This area relates to the management and organization of the process. Important topics of this influencing factor concern the planning, control, monitoring and improvement of the process.

Measurability:

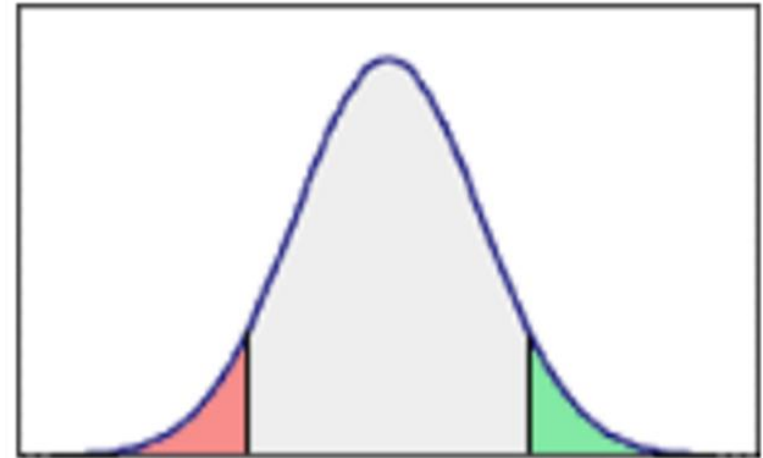
- This refers to the ability to measure and monitor the process. This includes the definition of performance indicators, data collection and analysis, and the use of metrics to evaluate process performance.

Change Management



- Is a systematic approach to dealing with the transition or transformation of an organization's goals, processes or technologies. The purpose of change management is to implement strategies for effecting change, controlling change and helping people to adapt to change.

- The resistor speaks of fear and what we will lose
- The supporter speaks of opportunity and what we will gain
- Unfortunately - people are more persuaded by loss than by gain



Resistant Neutral Supportive
The Attitude Bell Curve

Change Management

Details of Change	Implementation of Change	Review of Change
Identify the Change Particulars of the Change	Implementation Strategy	Appraisal of Change Strategy
Change Approach	Release Strategy	



- Schedule of Activities
- Action Plan
- Communication Plan
- Training Plan
- Resistance to Change Plan
- Employee's Change Readiness Plan
- Release Plan
- Review Strategy



CHANGE MANAGEMENT PLAN

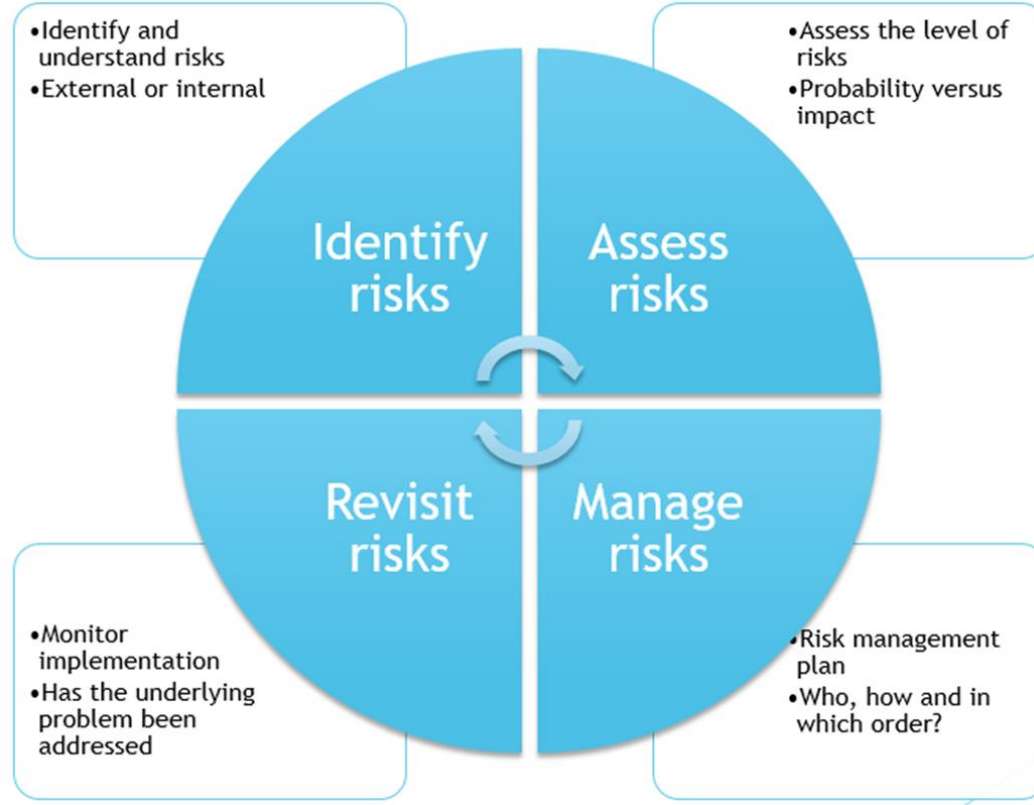
Risk Management



- In the process of considering the different aspects of a project we need to consider what might happen leading up to and implementing the project as well as what may be the unintended consequences of the project.
- The Risk Matrix will allow you to assess the likelihood and consequences of the change,
- What risks may occur upfront, during implementation and after implementation?
- What tactics will you put in place to minimize these risks? = RISK MANAGEMENT,

- As defined in ISO 31000 RISK is the effect of uncertainty on objectives, whether positive (opportunity) or negative (threat).
- RISK MANAGEMENT is the identification, assessment, and prioritization of risks followed by the application of resources to minimize, monitor, and control the probability of occurrence of any unfortunate events.
- Effective Risk Management increases the probability of positive risks and decreases the probability of threats.

Risk Management Cycle



Risk Matrix

		Consequence				
		Negligible	Low	Moderate	Major	Extreme
Likelihood	Certain					
	Likely					
	Possible					
	Unlikely					
	Rare					





















Risk Assessment – Likelihood/Consequences

■ Risk areas - examples

External risks	Market risks	Operational risks
Cost risks	Performance risks	Technology risks
Communication	Skills resource risks	Financial risks
Strategic risks	Law risks	Compliance risks
Natural environment risks	Lack of clarity	Scheduling risks
Change management	Cost uncertainty	Market changes
Project management	Public procurement	Budget risks

Risk Matrix

Consequence Skills resource risk Operational risk
Cost risk Financial risk Technology risk

Likelihood		Negligible	Low	Moderate	Major	Extreme
	Certain					 
	Likely					
	Possible					
	Unlikely					
	Rare	  		 		

- **Avoid the Risk** - It is a good option, but have to remember about one thing that by avoiding the risk, one is missing out an opportunity.
- **Share the Risk** - Share the risk as well as the potential gain with other organization or even with some third parties (insurance companies).
- **Accept the Risk** – Especially when the potential loss is less or when the potential gain is worthy.
- **Control the Risk** - Using preventive (aim to prevent a high-risk situation from happening) and detective actions (involve double-checking, quality assessments ...)

Other important management issues

- **Communication** (target groups, stakeholders)
- **Budget** (investments, co-financing, expenditures)
- **Human Resources** (Project team, responsibilities)
- **Time** (plan, schedule, milestones, monitoring)
- **Quality** (controls, quality assessments)

Thank you for your attention

Manfred Elmecker, Gerhard Levy



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