The Job of the Project Manager

Robert Youker
World Bank (retired)
5825 Rockmere Drive
Bethesda, Md. USA 20816
bobyouker@worldnet.att.net

For any organization and for any project manager it is vitally important to know what are the specific duties or Terms of Reference for the Project Manager, what tasks must he or she must perform and what is their authority and responsibility (Project Charter). Yet in the literature of Project Management there are few references or specific examples of these much needed items. This paper presents examples of three key documents on the Project Managers job: 1. A list of tasks organized by the sequence of management activities, 2. a list of duties or Terms of Reference and 3. a Project Charter defining organzational relationships. There are obvious overlaps and similarities as well as differences in these three documents.

Exhibit 1 is a list of on-the-job tasks for the Project Manager organized by the sequence of activities on a project. It is based on the 12 modules of the World Bank Institute training package on *Managing the Implementation of Development Projects* as follows:
1. Understanding the Project and Project Management
2. Structuring the Project Organization
3. Building the Team
4. Analyzing the Project Context
5. Refining Objectives, Scope, and Other Project Parameters
6. Preparing the Work Breakdown Structure (WBS)
7. Planning and Scheduling with the Critical Path Method
8. Obtaining Management Approval and Support
9. Designing Control and Reporting Systems (Cost, Time,
Resources, and Scope (Performance and Quality)
10. Organizing Procurement
11. Executing and Controlling the Work
12. Terminating the Project.

The list assumes that the Project Manager has not been involved in project preparation activities and was not appointed until the start of the Implementation Phase. Thus the first step is to study the existing documentation and find out what the project is all about.This is a very detailed list of tasks which forms a useful checklist for the Project Manager, the project team and the rest of the organization including functional managers.

Exhibit 2 is a sample list of the Duties or Terms of Reference (TOR) for a Project Manager.It is less detailed than the on-the-job tasks list and organized by topic rather than by chronology. The content would vary by organization and specific project but the

basic content would be the same. The list would be useful in recruiting Project Mangers and defining their job responsibilities. (job description)

Exhibit 3 is a sample of a Project Charter defining the authority and responsibility of a Project Manager. It is primarily intended to establish the role and responsibility of the Project Manager vis-a-vis the functional managers in the organization in a matrix structure. Again the details would be different for different organizations and specific project situations.

Professor David Wilemon of Syracuse University has spelled out the vital nature of a Project Charter, "Unless the project manager's charter is delineated very clearly, not only to him but to others in the organization, he is neither fish nor fowl. He is not master of his destiny. The charter is the environment that is created for the project manager. It is 50% of the battle of whether he is successful or not. It says, does he have management's support to run his project as he sees fit, or does someone else."

It is hoped that these three documents will serve as drafts for organizations to prepare their own Checklists, Terms of Reference and Project Charters. This paper was prepared for the June 2002 IPMA Conference in Berlin and they control the copyright.

These documents are part of the World Bank Institute's, ***Managing the Implementation of Development Projects,*** a Resource Kit for Instructors on CD-ROM. For information please contact John Didier at jdidier@worldbank.org.

Exhibit 1

Job Aid
On-the-Job Tasks for the Project Manager by Module

Module 1–Understanding the Project and Project Management

- Review the existing project documentation, such as the project analysis report, to understand the project's history.
- Identify end-of-project objectives and deliverables.
- Review or establish a hierarchy of objectives and identify higher-level project objectives (logframe).
- Analyze the project to assess if it is likely to meet its higher-level objectives.
- Identify the assumptions underlying the project.
- Identify changes or errors in these assumptions, including technological, financial, economic, institutional, social, and environmental issues.
- Determine if these changes or problems justify recommending a reappraisal of the project to management.

Module 2–Structuring the Project Organization

- Review the project analysis report and the initial project charter (obtained from superiors) that define the responsibility, authority, and relationships of the project manager, project staff, and functional department heads.
- Specify staff responsibilities.

- Assess the level of authority of the project manager and project staff.
- Evaluate the probability of successful implementation under the current charter and determine if there is a need to renegotiate the charter.
- Determine how to strengthen the project manager's authority if necessary.
- Create a proposal for a revised project charter.
- Have the revised charter approved and distributed.

Module 3–Building the Team

- Select appropriate staffing for a project office if not assigned.
- Identify team members and other stakeholders.
- Agree on procedures.
- Prepare a team building strategy.
- Form the team and hold a project start-up workshop for the core team.
- Provide leadership to the team.
- Manage core team meetings.
- Build the team's commitment to the objectives of the project.
- Make sure that team members know their roles and responsibilities.
- Use forms of power that are appropriate to the situation, including gaining influence without formal authority.
- Keep the team motivated.
- Be aware of interpersonal relations among team members.
- Identify sources of conflict and apply conflict resolution strategies.
- Analyze communications and perceptions within the team.
- Use information on personality styles and types to improve collaboration.
- Plan and convene project launch workshop(s) for stakeholders.

Module 4–Analyzing the Project Context

- Identify relevant actors and factors.
- Determine the degree of dependency of the project on each actor or factor.
- Estimate the risk (for example, the probability of something going wrong) associated with each relevant actor or factor.
- Assess the degree of management control or influence over the actor or factor.
- Identify actors or factors that need special attention.
- Develop strategies for increasing control or influence, including informal linkages (for example, inviting a person to lunch) and formal linkages (for example, forming a committee).
- Develop a plan to cope with potential problems caused by actors and factors, especially those characterized by medium or high dependency, medium or high risk, and medium or low control.

Module 5–Refining Objectives, Scope, and Other Project Parameters

- Lead the project team in reviewing the project analysis report.
- Work with team members as a group to systematically review the project analysis report and to reach a common understanding of objectives, deliverables, organization structure, and other key parameters.
- Set the control period and level of detail.
- Develop product structure by listing major components and subcomponents.
- Review the overall budget and the budget for each deliverable.
- Clarify process structure (for example, life cycle subphases, milestones, and decision gates) for the implementation phase of the project life cycle.
- Identify where a project is in its life cycle.

- Identify risks and resolve issues. Issues may relate to deliverables, schedule, budget, risks, and so forth.
- Make recommendations to management.

- ***Module 6–Preparing the Work Breakdown Structure, Responsibility Matrix, and Master Summary Schedule***

- Convert the product structure into a tree diagram.
- Add necessary process-related work from the process structure to the work breakdown structure (WBS).
- Add the necessary organization-related work to the WBS.
- Adjust the level of detail of the WBS as required.
- Code the WBS.
- Create a responsibility matrix.
- Create a master summary schedule.

Module 7–Planning and Scheduling with the Critical Path Method

Planning
- Review the WBS, responsibility matrix, and master summary schedule.
- Select the appropriate planning tool: activity list, bar chart, or network diagrams (precedence, arrow, and PERT).
- Generate a list of activities for each summary activity and assign responsibility.
- Estimate the duration of each activity.
- Establish the sequence of activities.
- Prepare a precedence network diagram.
- Determine the critical path.
- Calculate float (slack).

Scheduling
- Calculate resource requirements.
- Schedule float activities.
- Compare the results to the original schedule and resource constraints.
- Evaluate risks based on expert advice and experience and modify the schedule accordingly.
- Identify discrepancies and opportunities and escalate to management.
- Determine if the project can meet the target completion date specified in the project analysis report and, if not, decide on the best strategies to reduce duration.
- Revise master summary schedule.

Using Computers
- Apply selection criteria to choose the right tool.
- Set up the computer tool (modify defaults).
- Read and interpret sample output reports.
- Match different types of reports with different users and purposes.

Module 8–Getting Management Approval and Support

- Review the proposed project implementation plan.
- Verify resource commitments with the heads of departments where various pieces of the project work reside.
- Determine who needs to give formal and informal approvals.
- Develop a strategy for obtaining approval from relevant decisionmakers.
- Prepare a presentation to management (project review).

- Practice delivery of presentation.
- Present to management and negotiate.
- Revise plan as required.
- Obtain sign-off (approvals).
- Develop a strategy for maintaining support.
- Implement the strategy for maintaining support.

Module 9– Designing Control and Reporting Systems (Time, Cost, Resources, and Scope (Performance and Quality))

- Understand and be able to use standard tools for monitoring time, cost, and performance in relation to plan and for controlling scope.
- Determine which management tools to use for controlling the process in terms of scope, time, performance, and cost.
- Use the control period to determine the frequency of reporting.
- Identify the kinds of data that need to be collected.
- Identify who will provide the data.
- Identify ways of making the provision of data rewarding or at least not burdensome.
- Identify who will receive the reports.
- Identify information processing requirements.
- Design forms for data collection, display, and reporting.
- Work with the information systems department as required to establish data collection, processing, and reporting systems.
- Avoid setting up duplicate systems.
- Design systems for simplicity.
- Schedule routine, regular meetings for staff.
- Separate project review sessions from detailed problem solving sessions.
  Use appropriate technology.
- Match the appropriate report style and content to the audience and purpose.

Module 10–Organizing Procurement

- Hire (if not already assigned) and supervise procurement staff.
- Review national procurement requirements and those of financing institution(s).
- Establish procurement strategy in collaboration with procurement staff:
- Review deliverables and identify items for procurement.
- Decide on methods of procurement (for example, local, international, and so forth).
- Identify donor requirements and incorporate in the plan.
- Select appropriate type of contracts.
- Decide how the total procurement will be divided into separate contracts.
- Prepare a schedule for procurement.
- Supervise preparation of necessary documents (announcements, letters, invitation to bid, and so forth.).
- Supervise planning and execution of bidding and selection process.
- Supervise process for evaluating bids.
- Supervise preparation and negotiation of contracts.
- Supervise creation of procedures for management of contracts and disbursement of funds.

- ## *Module 11–Executing and Controlling the Work*

- Start up management information systems (for time, performance, cost, and scope control and reporting).
- Implement processes for data collection, processing, and reporting.
- Initiate procurement of works, services, and goods/equipment.

- Monitor project parameters (through reports) and compare progress versus plan.
- Monitor procurement and resolve procurement issues.
- Replan and reschedule as required.
- Secure approval from management for required changes in resource use or schedule.
- Distribute revised plans.
- Maintain team building and communication activities.

Module 12–Terminating the Project

- Close out project accounts, including work orders and work packages.
- Close out contracts and settle any outstanding disputes.
- Arrange for transfer of personnel to other assignments.
- Prepare as-built drawings, or the equivalent, and other project documentation.
- Transfer files and documentation archives.
- Obtain required government approvals and certification.
- Close physical facilities.
- Review punch list to ensure that outstanding items are finished.
- Plan for maintenance.
- Plan for an ex post evaluation of the project and design of monitoring system for operations, if required by the lender or owner.
- Plan inspection and acceptance procedures.
- Inspect and accept deliverables.
- Coordinate transition to operations.
- Train operations team.
- Conduct an end-of-project audit.

Exhibit 2

The Project Manager's Duties

[Purpose: To implement the project within budget and according to project specifications, project schedule, and organizational policy and procedures]

Organization and Staffing

- **Set up and manage the project implementation unit**
- **Build Teamwork**
- **Coordinate across the matrix**
- **Work with other departments**
- **Establish procedures**
- **Arrange training**
- **Provide administrative services**

Objective and Plans

- **Define and clarify objectives and specifications**
- **Develop plans and schedules; define and approve all changes in plans and scope**
- **Arrange resources**
- **Approve technical design decisions**

Procurement

- **Organize procurement; award contracts**
- **Recruit and hire consultants**
- **Supervise consultants and construction**

Management

- **Be responsible for management of all aspects of the project**
- **Lead and motivate the project team**
- **Manage human relationships**
- **Manage staff and resolve conflicts**
- **Cope with risks**

- Maintain quality control

MIS (Management Information Systems)
 - Prepare budgets and financial reports
 - Hold staff meetings and project reviews
 - Monitor and control actual vs. plan
 - Submit periodic reports to top management
 - Maintain project files

Other

 - Handle public and
   customer relations
 - Travel to the field
 - Work with stakeholders

Exhibit 3

Typical Elements in a Project Charter

Authority:

The project manager has the delegated authority from top management to direct all project activities.

Responsibility:

The project manager's responsibilities are to the chief executive for overall project direction according to established business objectives and contractual requirements regarding technical specifications, schedules, and budgets.

More Specifically, the Project Manager Is Responsible for:

1) Establishing the project organization

2) Establishing and maintaining the project plan

3) Managing and controlling the project, and

4) Communicating the project status

5) Escalating decisions or unresolved problems in a timely manner

The Project Charter Should Address

I) Establishing the project organization

1. The project manager's position directing all project activities

2. The need for a defined authority-responsibility relationship among

The project manager,

Functional managers,

Task managers, and

Top management

3. The need for influence to cut across functional and organizational lines

4. Collaborating (with the personnel office and the functional supervisors) in staffing the project

5. Establishing a project organization (a matrix organization) for the duration of the project

6. Having a voice in maintaining the integrity of the project team during the complete life of the project

7. Participation in the merit evaluation of key project personnel assigned to the project

8. The need to state clearly who the project sponsor is and what access the project manager has to him/her/them

The Project Charter Should Address

II) Establishing and maintaining the project plan

9. Establishing project plans through the coordinated efforts of the organizations involved in the project

10. Providing leadership in the preparation of operational requirements, specifications, and bid packages and change control

11. Active participation in major management and technical decisions

12. Allocating and controlling the use of funds on the project

The Project Charter Should Address

III) Managing and controlling the project

13. Control over the allocation and expenditure of funds, and active participation in major budgeting and scheduling deliberations
14. Selection of subcontractors to support the project and the negotiation of contracts
15. Rights in resolving conflicts that jeopardize the project goals
16. Promoting technological and managerial improvements throughout the life of the project
17. Managing the cost, schedule, and technical performance parameters of the project

IV) Communicating project status

18. Providing an information system for the project with sufficient data for the control of the project within allowable cost, schedule and technical parameters
19. Maintaining prime customer liaison and contact on project matters
20. Reporting on project progress