



Тема 1

1.1. Введение в концепцию управления проектом: Основы управления проектным циклом (УПЦ)

*Программа территориального сотрудничества
Беларусь – Украина*

Подготовка и управление проектами

Георгий Баранец

г. Ровно, 23-26.09.2014

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What is the action (project)? *Что такое проект?*

(начало)

A project is a self-contained operation with the following components – Проект - самостоятельная деятельность, которая предполагает:

- clearly defined objectives and target groups – четко определенные цели и целевые группы;
- coherent set of activities – согласованный набор мероприятий (действий);

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What is the action (project)? Что такое проект?

(окончание)

- planned results – планируемые результаты;
- limited timeframe and timeline – ограниченные временные рамки и график выполнения;
- logistic & budget – материально-технические средства и бюджет;
- responsible structure and personnel – структуру, ответственную за реализацию, и персонал

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What is the action (project)? Что такое проект?

A project is – проект это

- **a plan** (document)
developed – **план**
(документ)
разработанный

- **an activity** (action)
implemented –
деятельность (действие)
реализованное

to achieve fixed objectives with specific/limited resources (financial, human, material and technical) within a defined timeframe – для достижения определенных целей с использованием конкретных/ограниченных ресурсов (финансовых, человеческих и материально-технических)

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Project as a plan *Проект как план*

A Project as plan (Project Application) consists of logically subordinated – Проект как план (Проектная заявка) состоит из логически соподчиненных:

- definitions - определений,
- descriptions - описаний,
- explanations - пояснений,
- justifications - обоснований,
- estimations - оценок,
- detailed budgeting and - детального бюджета и
- time and activity scheduling - графика реализации

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A project application *Проектная заявка*

A Project Application is justification/proof of opportunity to ensure reasonable and feasible input to the Policy/ Strategy/ Programme objectives within **required constraints** – Проектная заявка – это обоснование/доказательство возможности обеспечить приемлемый и достижимый вклад в достижение целей политики/стратегии/программы с учетом **требуемых ограничений (рамков)**

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A project constrains Ограничения проекта

- ▶ **Policy**/strategy/programme context – политический, стратегический и программный контекст
 - ▶ **Place**/geographical area/scale – место/территория/масштаб
 - ▶ **Scope**/subject/thematic area – сфера/предмет/тематика
 - ▶ **Methodology** as applicable – приемлемая методология
 - ▶ **Cost & resources** used – стоимость и используемые ресурсы
 - ▶ **Time** frames – временные рамки

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Why develop a project? Для чего разрабатывать проект?

**Projects provide answers to the following questions –
Проект дает ответы на следующие вопросы:**

- How to solve a problem – Как решить проблему?
- How to meet a need – Как обеспечить удовлетворение потребности?
- How to overcome a constraint – Как преодолеть сдерживающие факторы?
- How to take advantage of an opportunity – Как использовать возможности?

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Which project? Какой проект?

Projects should – проект должен:

- respect the programme principles – соответствовать принципам программы
- contribute to the objectives, results and indicators defined in the programme – вносить вклад в цели, результаты и индикаторы, описанные в программе
- have the recommended financial size and structure – иметь рекомендованный объем и структуру финансирования

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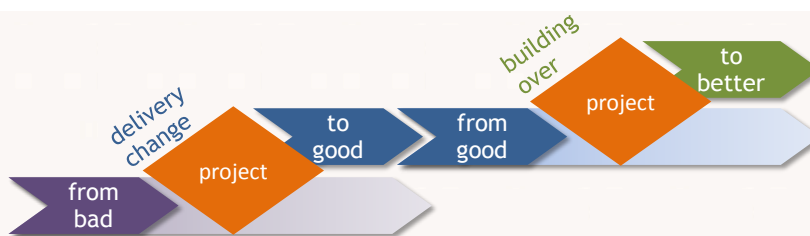


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Change for the best value



A **project** is instrument for delivering actual change



This **change** must bring concrete benefits



These **benefits** must be measurable/ evaluable



The ultimate **value** of the benefits must
significantly exceeding the project costs

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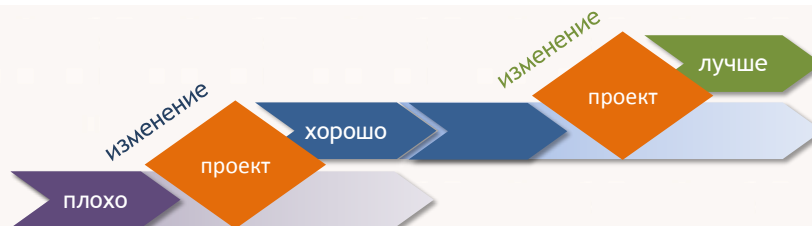


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Изменение с наибольшей выгодой



Проект – это инструмент достижения изменения

Такое **изменение** должно приносить выгоду

Такая **выгода** должна быть измерима

Окончательная **ценность** полученной выгоды должна превышать затраты

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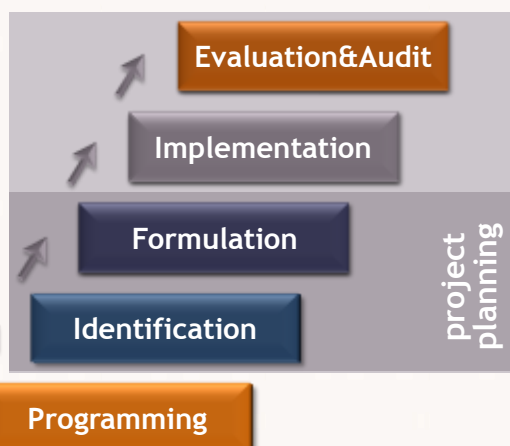
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The PCM operations



Programme/project Management Cycle (PCM)



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Действия в рамках ЦУП



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PCM phase 1

Setting up geographical, thematic scope, budgetary and time frames for projects



Programming

Based on previous achievements

- **Situation analysis** at the national / regional level
- Review of **wider** policy / strategy **framework**, national and sector / area / institution / stakeholder **specific priorities**
- **Identification of** policy / strategy / programme **objectives**

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ЦУП, фаза 1

Определение географической и тематической области, бюджетных и временных рамок проектов



Программирование

Основывается на предшествующих достижениях

- **Ситуационный анализ** на национальном/региональном уровне
- **Определение** политических и стратегических рамок и конкретных приоритетов
- **Определение** целей политики, стратегии или программы

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PCM phase 2

Project identification & planning: mostly concentrated on conceptual issues



Identification



- Detailed problem & stakeholder analysis
- Objective analysis and strategy selection
- Definition of objectives and priorities
- Stakeholder consultations, screening for identification of relevance

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ЦУП, фаза 2

Определение и планирование проекта: в основном на концептуальном уровне

Определение

- Детальный анализ проблем и заинтересованных сторон
- Анализ целей и выбор стратегии
- Определение целей и приоритетов
- Консультации с заинтересованными, тщательная проверка на соответствие

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PCM phase 3

Project planning:

Formulation

mostly concentrated on detailed planning

- Development of logic and clarification of expected benefits
- Evaluation of institutional opportunities, feasibility and sustainability
- Evaluation of environmental, social and economic consequences
- Activity planning
- Resource planning (budgeting)

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ЦУП, фаза 3

Планирование
проекта:



Формулирование



детальное
планирование

- Разработка логики и уточнение ожидаемых выгод
- Оценка институциональных возможностей, реализуемости и устойчивости
- Оценка экологических, социальных и экономических последствий
- Планирование действий
- Планирование ресурсов (бюджет)

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PCM phase 4



Implementation



Requires
consideration during
the project planning
phase

- Initiating and implementing of activities (how project activities will be implemented)
- Tracking of the achieved progress (how progress will be measured and documented)
- Monitoring (comparing actual and planned results)

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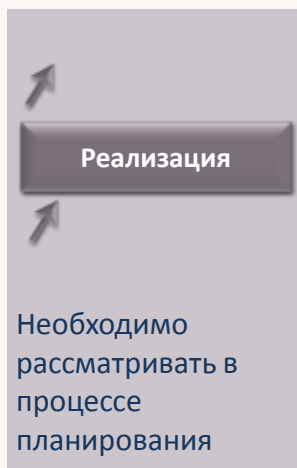


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ЦУП, фаза 4



- Начало и реализация мероприятий проекта (как они будут реализованы)
- Отслеживание прогресса (как достигнутый прогресс будет отслеживаться и документироваться)
- Мониторинг (сопоставление запланированных и фактически достигаемых результатов)

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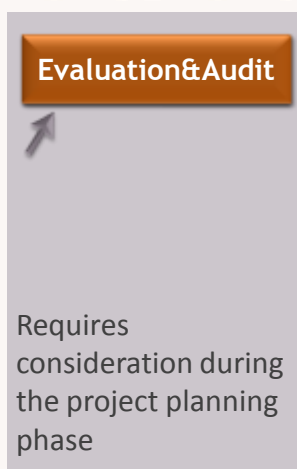


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PCM phase 5



- Evaluation of achieved results
- Adapting activities
- Ensuring sustainability
- Project reporting and audit
- Input made to achievement of programme indicators

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ЦУП, фаза 5

Оценка и аудит

Необходимо
рассматривать в
процессе
планирования

- Оценка достигнутых результатов
- Адаптационные мероприятия
- Обеспечение устойчивости
- Отчетность по проекту и аудит
- Вклад, сделанный в достижение индикаторов программы

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PCM key definition

Основное определение УПЦ

Project Cycle Management (PCM) - a methodology for the preparation, implementation and evaluation of projects and programmes based on the principles of the **Logical Framework Approach (LFA)** [PCM Guide]

Управление проектным циклом (УПЦ) – это методология, которая используется для подготовки, реализации и оценки проектов и программ, основанная на **логико-структурном подходе (ЛСП)** [PCM Guide]

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Useful source
Полезный источник

Aid Delivery Methods
Volume 1. **Project Cycle
Management Guidelines**
(EN)

<http://goo.gl/0Mb5JE>



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Тема 1

1.2. Введение в логико-структурный подход (ЛСП)

*Программа территориального сотрудничества
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Подготовка и управление проектами

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PCM & LFA УПЦ и ЛСП

PCM and LFA are the first and foremost tools to effective planning, planning that makes change – УПЦ и ЛСП – это лучшие передовые инструменты проектного планирования, которое несет реальные изменения

PCM - УПЦ

- reflects the decision-making and implementation process – отражает процесс принятия и реализации решений

LFA - ЛСП

- provides methodological basis for key phases of planning process – обеспечивает методологическую основу ключевых этапов планирования

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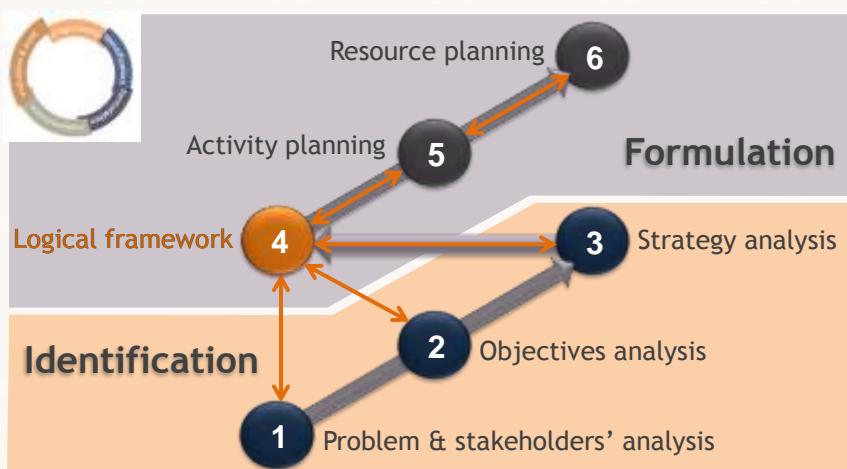


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From idea to application



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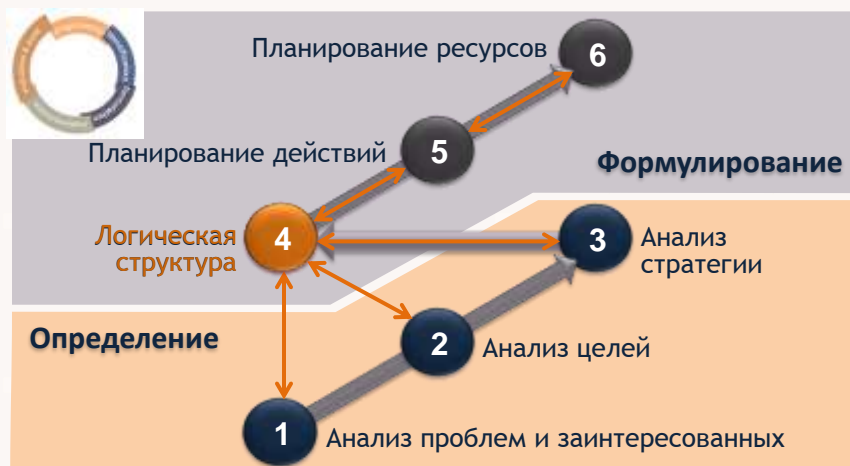


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От идеи к заявке



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A Project Application (PA) Проектная заявка (ПЗ)

- A Project Application is the key output of the formulation stage of the PCM – Проектная заявка является основным результатом стадии определения в процессе УПЦ
- Understanding of all documents and requirement of any Call to the Project Application is the key to success – Понимание всех документов любого конкурса заявок является ключевым фактором успеха
- Read all documents carefully (including footnotes) – Читайте документы внимательно (включая сноски)!!!

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Developing the PA Разрабатывая ПЗ

The main advise is – **Основной совет**

be as **specific** and as **precise** as possible while develop definitions, descriptions, explanations, justifications and estimations for your Project Application

при разработке проектной заявки будьте максимально **конкретны и точны** в определениях, описаниях, пояснениях, обоснованиях и оценках



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Key elements of the PA

The PA order

- Estimated cost
- Objectives of the action:
 - *overall objective(s)*
 - *specific objective(s)*
- Target group(s)
- Final beneficiaries
- Estimated results
- Main activities
- Problems / needs

The project logic order

- Problems / needs
- Objectives of the action:
 - *overall objective(s)*
 - *specific objective(s)*
- Estimated results
- Main activities
- Target group(s)
- Final beneficiaries
- Estimated cost

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Основные элементы ПЗ

Порядок ПЗ

- Estimated cost
- Objectives of the action:
 - *overall objective(s)*
 - *specific objective(s)*
- Target group(s)
- Final beneficiaries
- Estimated results
- Main activities
- Problems / needs

Порядок логики проекта

- Problems / needs
- Objectives of the action:
 - *overall objective(s)*
 - *specific objective(s)*
- Estimated results
- Main activities
- Target group(s)
- Final beneficiaries
- Estimated cost

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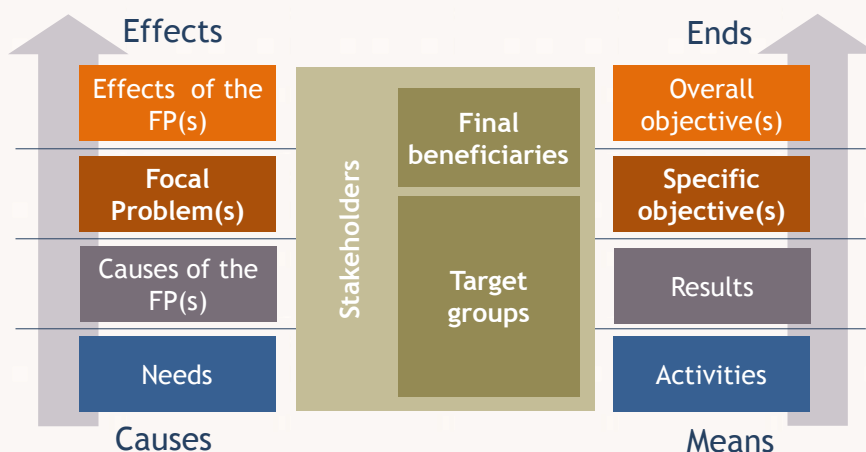


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The project logic order



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Порядок логики проекта



Thank you for your attention!
Благодарю за внимание!

Georgii Baranets