



# Key Resources for Project Managers

*Because no staff member plays a more critical role  
in ensuring successful project results than the  
project manager*



# Session Outline

- Background and Purpose of the **Key Resources for Project Managers guide**
- Structure of the guide
- Content covered
- Ways to use the guide
- Recommendations for implementation



# Background of Resource Guide

- Assistant Country Directors (ACDs) in Africa determined that project manager capacity building was a critical need in Regional Countries
- The guide was developed through a process of gathering information and feedback from ACDs and other field-based staff



# Purpose of Guide

## The **Key Resources for Project Managers:**

- Explains the essential information a Project Manager needs to know to perform their job
- Acts as a reference guide (not a training manual)
- Reduces the start-up time for the new Project Manager



# Structure of the Guide

*Key Resources for Project Managers* contains six guides. Each guide has 3 sections:

1. **A reference** that contains the content for the topic
2. **A self-study** that the project manager can use to gauge his or her learning
3. **Leader's notes** give tips and a structure for using the self-study to train and coach the project manager



# The Reference

- It **DOES NOT** provide information on **everything** a project manager may ever want or need to know
- It **DOES** explain essential information to orient the Project Manager to his or her assignment
- It **DOES** reinforce key concepts that are aligned with CARE's strategy
- It **DOES** provide tips for effective management oversight of people and projects



# Self-Study for the Project Manager

The self-study is used to reinforce the key points and provide a “learning check”. The self-study contains two parts:

1. Check Your Understanding
2. Application to Your Job



## **TIP**

*The self-study is more valuable if the supervisor or a colleague reviews the work and engages in a discussion with the project manager about how this information applies to his or her job.*

# Leader's Notes

- Provided for the supervisor or mentor who works with the project manager on the self-study.
- Includes suggestions for coaching the project manager and for customizing the learning experience to make it more relevant and personal.



# Content Covered

- Guide 1- Orientation to CARE
- Guide 2- Project Manager Basics
- Guide 3- Critical Thinking
- Guide 4- People Management
- Guide 5- Finance
- Guide 6- Report Writing



# Guide 1- Orientation

*Gives the project manager basic information about who CARE is, what we do, and what it means to be a CARE employee*

## Topics include:

- History of CARE
- CARE's work today
- The program approach
- CARE International
- CARE USA
- CARE USA's structure
- The CARE employee



# Guide 2- Project Manager Basics

*Focuses on the “nuts and bolts” of the project manager’s responsibility in each of the phases of the project life cycle*

## Topics include:

- The big picture: how project management fits into CARE’s program approach
- Understanding project documents
- Preparing project implementation plans
- Budget planning and monitoring
- Managing and monitoring sub grants
- Complying with contracts
- Monitoring and evaluation
- Project report writing



# Guide 3- Critical Thinking

*Explains why critical thinking is so important to the job of project manager- It focuses on problem solving as the heart of the critical thinking process*

## Topics include:

- The basics of critical thinking
- Problem-solving techniques
- Tools for problem solving



# Guide 4- People Management

*Based on CARE's management standards and the key managerial actions that affect the performance of our employees*

## Topics include these managerial actions:

- Set direction
- Coach and develop
- Promote staff wellness and safety
- Model gender equity and diversity
- Communicate



# Guide 5- Finance

*Gives a foundation for managing the finances of a project*

## Topics include:

- CARE Chart of Accounts
- Financial management of grants
- Sub grant management
- Principles of internal control
- Budgeting and reporting



# Guide 6- Report Writing

*Explains the reporting process, the role the report plays in maintaining the quality of CARE's work, and the information needed to write an effective report*

## Topics include:

- Preparation for writing the report
- The content
- Effective report writing practices
- Review and practice



# Ways to Use *Key Resources for Project Managers*

- Use guide with existing project managers as a review
- Use guide with new hires to introduce them to their job and review a chapter every week for the first 6 weeks
- Use the guide as routine agenda item in regular meetings
- Create formal training for a group or team in a concentrated period of time customized to project and donor requirements



# Suggestions for Implementation

- Ask each CO to submit a short plan to the RMU for how they will use
  - a timeframe by which all current project managers will receive the materials
  - a plan outlining how the materials will be used in future
- Discuss use and impact of use at next Regional PQ meeting



# Ideas to Introduce this Guide to Staff

- Country Directors review contents and how the material is organized
- Country Directors and core leadership team discuss how to use this guide in the Country Office
- Put a follow-up system in place to ensure each project manager has received the guide, reviewed with a supervisor
- Identify appropriate ways of integrating the use of the pack in routines for your Country Office (for example, include in monthly/quarterly meeting agendas)



# Ways to Evaluate the Guide

## Questions to Ask at the Regional Meeting:

- How have you used or customized the use of these materials?
- How many PMs received the material in your CO?
- How do you know if they have used it as a reference?
- What feedback have you received from the Project Managers?
- What additional PM capacity building is needed that the guides do not cover?



# Next Steps for Distribution & Translations

- Each CO in Africa will receive several guides before August 1
- Additional copies can be downloaded from CARE Academy
- Each Regional Director will clarify their expectations regarding the introduction and use of the guides
- Initial set of the materials are in English, only. July-August is time to gather corrections before they are translated
- Send corrections to [rbaggett@care.org](mailto:rbaggett@care.org)
- Translation (pending budget) will happen in late September for French, Spanish, and Portuguese

