

Inspired by: Geoff Reiss / Project Management Demystified

Project Management is the discipline of planning, organizing and managing resources to bring about the successful delivery of specific project impact, outcomes and outputs. The primary challenge of project management is to achieve all of the project results, while honouring the preconceived project constraints related to scope, budget, schedule and quality. The project manager is responsible for ensuring the overall success of the project and seeing that deliverables arrive on time, on scope, on budget and within acceptable quality levels. (PMD Pro 1)

SUMMARY

Why this manual?

The project management manual will help to ensure a consistency of practice across all projects by providing a single source of instructions at SNV Vietnam for the management of project start-up, implementation and closure.

Who is this for?

The manual is for you – the project manager in SNV. It can also be used by project team members and those who support project managers, such as the Programme Assistant, Finance Officer, Human Resources Officer, Sector/Programme Leader, Business Development Officer, Communications Officer, Planning, Monitoring and Evaluation Officer and Country Director. The [index](#) contains all these job titles and references the pages that are relevant for each job.

What does it contain?

- **Tools:** The manual gives an overview of project management practice, requirements, systems and tools in SNV, and provides [hyperlinks](#) to these.
- **Project phases:** The manual gives project management instructions for each of the project phases, i.e. start-up, implementation and closure. At each phase, the manual explains how SNV expects you – the project manager in SNV - to manage:
 - 1) team and partners,
 - 2) results, and
 - 3) finance and administration.
- **Find what you need:** The [one page quick reference](#), detailed [contents](#) and the [index](#) are all designed to help you to find back what you need.

How to use it?

The manual captures essential practice to successfully complete a project for SNV Vietnam. Put a shortcut to this manual on your desktop, so that you are reminded on a daily basis to consult it. It will enable you to always have access to the most up to date information to effectively manage your project.

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ONE PAGE OVERVIEW OF PROJECT MANAGEMENT IN SNV

	 Start-up	 Implementation	 Closure
 Team and partners	<p>Prepare internal project team for donor compliance</p> <p>Recruit project staff and organise their induction in SNV</p> <p>Ensure shared understanding of project impact and strategy by project team, partners and other stakeholders</p>	<p>Manage personnel and consultants performance</p> <p>Encourage regular reflection and peer-to-peer consultation by advisors.</p> <p>Maintain relationships with key stakeholders, including donors</p>	<p>Close all contracts and settle final contract benefits</p> <p>Conduct final staff performance review</p> <p>Register suitable CVs</p> <p>Write letters of recommendation</p> <p>Celebrate Accomplishments</p>
 Results	<p>Develop detailed work plan(s), including knowledge management and communication</p> <p>Create online Planning, Monitoring and Evaluation (PME) format</p> <p>Establish project baseline within the first six months</p> <p>Manage preconditions and risk</p>	<p>Prepare two-monthly progress update for SNV Management team</p> <p>Organise regular team meetings to steer towards impact</p> <p>Projects monitoring in quarterly Sector/Programme meetings</p> <p>Monitor with online Planning, Monitoring and Evaluation (PME) format</p> <p>Manage risks and adjust to change as per donor contract</p> <p>Arrange knowledge management and communication of practice and results</p>	<p>Organise evaluation as per online Planning, Monitoring and Evaluation (PME) format and baseline</p> <p>Document and disseminate lessons and results</p> <p>Prepare for scaling or exit</p> <p>Present final project results to partners, donors and other stakeholders</p>
 Finance and administration	<p>Establish delegation of authorities</p> <p>Contract the implementing partners</p> <p>Set-up the project filing system</p> <p>Prepare detailed budget, organise time writing, and agree financial information needs</p> <p>Double check donor contract for compliance, e.g. with reporting, procurement and visibility guidelines</p>	<p>Manage and control contracting and procurement</p> <p>Monthly monitoring of expenditures and time writing, and budget forecasting</p> <p>Quarterly progress update to SNV Management Team via Sector/Programme Leader</p> <p>External donor progress/narrative and financial reporting</p>	<p>Ensure that all expenditures can be made before end of contract</p> <p>Final reporting to donor.</p> <p>Organise audit as per contract requirements</p> <p>Archive project files as per donor and SNV requirements</p>



Tip: Use the [index](#) at the back of this manual to quickly find what you are looking for.

PROJECT START-UP

WHY DOES SNV WANT YOU TO FOLLOW PROJECT MANAGEMENT STANDARDS?

In the absence of formal start-up processes, a project runs the risk of (PMD Pro 1):

- Wasting time, money, personnel capacity and organizational capital pursuing a project that ultimately lacks commitment and support from key decision makers and/or ties-up resources that could be used to better effect on other projects;
- Demoralizing SNV colleagues and partners who have worked hard to produce the proposal;
- Creating false expectations and hopes on the part of project team, partners and other stakeholders;
- Damaging the credibility and reputation of SNV.

WHY SHOULD YOU CARE ABOUT SNV BEYOND THE SCOPE OF YOUR PROJECT?

While it is your primary responsibility as project manager to deliver results as per the project contract, your project contributes to a wider SNV programme or sector strategy, and builds on SNV capacity development expertise (see [SNV Way Map](#)). During the project start-up phase you prepare to capitalise on these unique aspects of SNV's work, so that your project achieves longer term impact in the sector, and adheres to SNV capacity development standards.

START-UP: TEAM AND PARTNERS

Work with the Business Development Officer and the Human Resources Officer to:

- Prepare internal project team for donor compliance.
- Recruit project staff and organise their induction in SNV.
- Ensure shared understanding of project impact and strategy by project team, partners and other stakeholders.



Tip: Hyperlinks [like this](#) take you to details in this manual. Hyperlinks [like this](#) take you outside this manual, to an online document.

INTERNAL KICK-OFF MEETING

When the contract is signed by the donor, the Business Development Officer organises and facilitates an internal kick-off meeting with all internal SNV stakeholders, following a [standard checklist](#). Purpose of the kick-off meeting is:

- All SNV stakeholders are aware of the contracting and reporting requirements from the donor, and of SNV systems (e.g. [Time writing](#), [Planning, Monitoring and Evaluation \(PME\)](#))
- To develop a common understanding of who is doing what, and who is responsible and accountable for the different contract elements.

DONOR RELATIONS

Unless your project is in a follow-on phase, the Business Development Officer has managed donor relations so far. During the internal kick-off meeting the communication lead is handed over to you - the project manager. In order not to confuse communications with the donor, everyone in SNV (including the Finance Officer) relates with the donor via the project manager.

Not all donors will have a representation in Vietnam, but when they do, you should invite the donor to important project events, presentations and field visits.

You must enter key contacts and meetings in [Sales Force](#), or ask the Business Development Officer to do so. Feel free to invite the Business Development Officer to donor meetings, especially in early stages of your project.

SALES FORCE: PROJECT DESIGN AND CONTRACT

You can have access to the following project design and contract documents in Sales Force (managed by the Business Development Officer):

- Call for proposal
- SNV expression of interest
- Donor meeting minutes, and minutes of other relevant project design meetings
- Contact details of SNV staff and consultants that have worked on the project design
- References of relevant previous projects
- Project proposal and budget
- Project contract, reporting schedules
- Relevant donor documents / requirements

EXTERNAL KICK-OFF WITH PARTNERS AND OTHER STAKEHOLDERS

Before partners can start project implementation you must have the [Start-up: Finance and Administration](#) in place, and develop, as a minimum, a [Memorandum of Understanding](#) and an [annual work plan](#) (known as Assignment Agreement).

SNV works with multiple actors and coordination and negotiation can initially be demanding. Consider organising one external kick-off meeting to ensure that project stakeholders understand project results and strategy. This is especially important when significant time has elapsed between project design and signature of the contract. Managing a large group of stakeholders can take considerable time and runs the risk of communications challenges. However, the advantage of having the complete group of stakeholders involved in a project kick-off meeting is that it ensures a robust analysis of the project document, resulting from many perspectives, and it helps assure that there is collective ownership for the project once it begins implementation. (PMD Pro 1)

Stakeholders need to be 100% clear about the scope of the project. You need to ensure that they do not have incorrect or unrealistic expectations. It is also important that there is no room for misunderstanding regarding accountability and reporting requirements between partners and SNV

PREPARE A BRIEF PROJECT DESCRIPTION

In consultation with Communications Officer, prepare a project synopsis (A4, double sided) summary of the project for stakeholders.

MAKE A STAFFING PLAN

To ensure that human resources are available to implement the project you must review the staffing needs for the project duration with the Human Resources Officer and the Finance Officer. The Programme Assistant will streamline the needs of your project with the Country Office [Staffing & PPD plan](#) (PPD stands for Primary Process Days). The illustration shows the contents of the staffing plan, and indicates what you – the project manager - are expected to monitor and explain.

Staffing & PPD Plan				Per:	From	01/01/12					
2012					To	18/09/12					
Programmes	Name Employee	Per.No	PPD available	Diff	Days covered by ext. fund	Days actual	Plan Balance	Norm Plan t	Contract balance	Norm contract ba	Remarks

Monitor this

Explain deviations

Illustration: Staffing plan

ORGANISE RECRUITMENT

LONG TERM POSITIONS

With the confirmation of the [staffing plan](#), you can contact the Human Resources Officer for recruitment and selection of project staff. S/he will help you to develop a [Job Profile](#) (for long term positions).

For long term positions a selection panel is organised, including: Sector/Program Leader, Project Manager, Human Resources Officer, Country Director, and Finance Officer (in case of project support staff for finance and administration). Unless the donor has stipulated that personal must be selected prior to project approval, the recruitment of staff takes at least 4-6 weeks, and the starting date may vary according to the availability of the candidate. Take this into account, so that recruitment does not delay project implementation.

The final decision to hire is not yours, but is made by the Country Director, based on input from the selection panel.

SHORT TERM CONSULTANTS / LOCAL CAPACITY BUILDERS

- You are responsible for the contracting process of short-term consultants/Local Capacity Builders.
- For short term consultants/Local Capacity Builders, you need to develop a [Terms of Reference](#). For substantial work consider developing an [Assignment Agreement](#).
- Hiring is subject to competitive bidding, with short listing of minimum three bidders. This can be done through publicised call for expressions of interest, or through a restricted procedure using the [SNV Vietnam data base](#) of consultants / Local Capacity Builders. The latter procedure requires justification in writing and agreement by the Country Director.
- Write a [Selection Report \(consultant/LCB\)](#) to justify the preferred consultant / Local Capacity Builder to the Country Director, who signs all contracts.

- The final decision who to hire and how much to pay is not yours, but is made by the Country Director, based on your selection report.

The Programme Assistant¹ can support you with the identification and contracting of consultants/Local Capacity Builders, the [Rules for hiring consultants/Local Capacity Builders](#) apply.

TERMS OF REFERENCE OUTLINE

- **Background** - Indicate developments that have led to the need for this assignment. Gives a description of the project context in which the assignment is carried out.
- **Objectives** - Indicate the objective(s) of the assignment as concretely as possible.
- **Specific tasks** - Give a list of specific and concrete tasks
- **Expected outputs** - Describe the deliverables of the assignment. E.g. training, report, solution to a problem, etc.
- **Reporting** - If a report is requested, describe the contents (very broad lines) of the report, the deadline for delivery, the language in which the report is to be drafted.
- **Time planning** - Include at least starting and ending date, and total estimated days. For larger assignments also include an activity planning (e.g. [Assignment Agreement](#)).
- **Fee and logistic arrangements** - Indicate fee, transport, accommodation, workshop organisation, DSA, and the need to provide a timeheet, if applicable.

Adapted from: From admin 31 Consultants Hiring / annex 4

DEFINITION LOCAL CAPACITY BUILDER

A Local Capacity Builder (LCB) can be an individual or a national (sometimes regional) organisation that provides a significant volume and quality of non-financial capacity development support to meso-level organisations. Local Capacity Builders can be drawn from the public, civil society or private realm. Their services can include a variety of roles and techniques, such as training, advice, organisational development, change trajectories, coaching, multi-actor processes, institutional and policy development work, knowledge brokering and learning programmes..

CONTRACTING SUMMARY

- You prepare a [Selection Report \(consultant/LCB\)](#), in which you give justification for the preferred consultant/Local Capacity Builder
- The Programme Assistant prepares contract with short term consultants/ Local Capacity Builders
- The Human Resources Officer prepares staff contracts and negotiates contracts
- Contracts are approved and signed by the Country Director
- The Programme Assistant is responsible for [filing hard-copies](#) of contracts

¹ In this manual we only use the term Programme Assistant. If your project budget caters for a Project Assistant, this support staff will have the same duties as a Programme Assistant in SNV, although limited to support services for your project.

INDUCTION OF NEW STAFF

The Human Resources Officer can support you with the induction of new project staff to SNV Vietnam. For advisors, you need to organise the following:

- Access to the [SNV Strategy](#), the relevant sector/programme strategy (Water Sanitation and Hygiene – WASH, Renewable Energy - RE, Agriculture) and sector publications and evaluations, especially if your project is scaling-up previous work. Explain how the project fits in the broader SNV Strategy and more specifically in the sector strategy. Your Sector/Programme Leader can help.
- Introduction to [Managing for Results](#) (MfR) and [online Planning, Monitoring and Evaluation \(PME\) format](#). The Business Development Officer (is MfR focal point) and the Planning, Monitoring and Evaluation Officer can help.
- Introduction to [SNV timewriting](#) system, categories and related procedures.
- All advisors in their first year with SNV attend “The SNV Way – developing the capacity of our advisors” ([brochure SNV Way](#)). Contact the Human Resources Officer for the upcoming programme date.
- Encourage advisors to use the [SNV Way Map](#), so that they build on SNV capacity development expertise.
- Probation (2 months) and development of a Personal Results and Development Plan (Brochure: [Managing for High Performance and Results](#)).

COMMUNICATION

Follow the requirements of the donor regarding communications. Some have strict rules, e.g. about visibility. In the absence of donor guidelines, use [SNV Brand Passport](#).

Always use the SNV logo in your communications, including email, and use the SNV power point format for presentations. In case of partnerships, the SNV logo should be equal size with the partner's logo, and with multiple partners the SNV logo is preferably on the left. For more specific information see the [Communication Toolbox](#).

You can count on the Communications Officer to support you, asked and unasked, on communication matters, application of corporate brand and promotional activities.

COMMUNICATION PLAN

The Communications Officer can support with the planning, implementation and monitoring of your communications; communication materials for participation in events; and website management where applicable.

START-UP: RESULTS

Work with the Business Development Officer and the Planning, Monitoring and Evaluation Officer to:

- Develop detailed work plan(s), including knowledge management and communication.
- Create online PME format
- Establish project baseline within the first six months.
- Manage preconditions and risk.

MANAGING FOR RESULTS INTRODUCTION

SNV is catching up with donor M&E requirements, especially building an evidence base of results at the various levels of the results chain (outputs, outcomes and impacts). That is why PME receives extra attention at this critical junction in SNV history, where SNV moves from fully core funded to fully externally funded. The [PME online tool](#) (see illustration below) is the new home for all result monitoring data (all projects online by mid December 2012). However, a PME format does not produce results, so here we present a coherent set of measures that enable you to "manage for results". For a complete overview see [Managing for Results](#) on the SNV intranet.

Choose your intervention:

Search all columns:

Show all interventions

nr.	filter	VIET NAM	select fit	select filter:	select filter:	select filter:	from date
Id	Title	Countries	State	User Roles	Sectors	Sub sectors	start date
63	Asia Biogas Program II: Biogas program for animal husbandry sector of Vietnam	VIET NAM	Active		Renewable Energy	Renewable energy / biogas	1-1-2007
75	ENRICH-Advancing Understanding of	LAO PEOPLE'S DEMOCRATIC	New		Other - describe		7-3-2011

Illustration: SNV online PME format

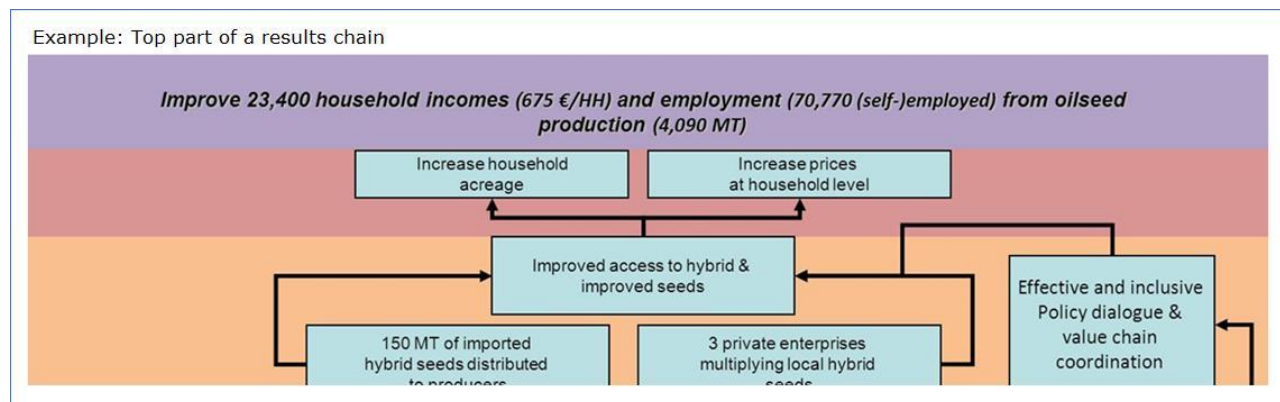
ALIGN DONOR AND SNV REQUIREMENTS

Together with the MfR focal point (see MfR intranet page for [a list](#)), and your project team, check donor compliance requirements for planning, monitoring and evaluation, including the process for making adjustments along the way. Align donor and SNV requirements.

MANAGING FOR RESULTS: TOOLS AND FORMATS

Some of these compulsory formats/tools are developed during project design. You need to either update or create them together with your team, based on the project document and the evolving situation in which your project intervenes. Your project team needs to understand and work with these formats/tools as instructed throughout this manual.

- **Actor Constellation:** An actor constellation map is a graphical representation of actors in your project and the various connections and interrelationships between them. The objective is to have an accessible, well organised and contextualised overview of relevant actors in your project and their interrelationships – including with SNV. An actor constellation map also includes a brief description of the dynamics of, and between, actors. The actor constellation map is thoroughly reviewed once a year. Can also be in the form of a value chain, so long as the main stakeholders and capacity development issues are identified.
- **Results Chain:** a diagram summarising the logframe / intervention logic / strategy of the project in four levels - activities, outputs, outcomes and impact. The results chain shows how activities, in parallel or in a particular sequence, will occur in order to achieve the anticipated outputs, outcomes and impact.



Tip: For more on actor constellation and results chain see the [Facilitators Guide for Intervention Logics](#).

- **Narrative:** a short description of the results chain (e.g. logframe / intervention logic / strategy of the project).
- **SMRV Indicators and targets:** To measure results, targets and indicators need to be Specific, Measurable, Relevant and Verifiable (SMRV). SNV uses [Harmonised Corporate Indicators](#) to redefine results targets and indicators, in case the project document results are not SMRV (also see [Handout indicators](#)).
- **Baseline:** The project baseline must be completed within the first 6 months of the project, and is used to set specific result target. The baseline is focussed on the indicators in the project document (or the SMRV version thereof), and is the basis for the project evaluation. SNV collects gender disaggregated data, where appropriate. The [SNV Baseline Guide](#) explains how to go about conducting a baseline survey.
- **PME plan:** The planning, monitoring and evaluation plan includes - what will be monitored and evaluated, when it will be monitored and evaluated, as well as details about who is responsible for monitoring.

WORK PLANNING

It is important not to confuse the project document, logical framework, or other documents developed during project scoping and design with project work planning. The project document is different in format, purpose, audience, level of detail, participation, timing, and schedule constraints. The project document was written with the aim of obtaining project approval and funding resources. Project work plans give detailed guidance for the successful implementation of the project. (PMDPro 1)

The responsibilities marked with # formally require a plan in SNV. However, timely implementation of all the following responsibilities is essential for effective implementation of your project, and this requires you to plan, schedule, or block time:

- **Coordination & Control Schedules** – project progress meetings and plan development with team and partners / project steering committee; time writing approval and status updates to SNV Management Team / project reports to donor ; implications analysis of updates to project scope, schedule or budget, and documentation of changes; communications and donor relations/negotiations.



Tip: Download this [SNV Project Management Calendar](#), which already includes required SNV meetings and monthly project management task, to plan your coordination and control schedule.

- **Staffing #** – the hiring, induction, time writing, and performance management and development of project staff, consultants / Local Capacity Builders.
- **Work / activity planning #** – the (annual) planning of activities (in December) and the definition of mutual responsibilities between team and partners; per project component or group of stakeholders as appropriate.

Some donors require that annual implementation plans be submitted for their multi-year projects, outlining operations for each year of the project. These annual implementation plans serve not only to ensure that the project work estimates are accurate and relevant, but also serve decision making. The review and approval process for the annual plans is an opportunity to verify that the assumptions of the project, as well as to confirm the availability of required resources, assess the external project context/risks, and monitor the vertical logic of the project. Based on the results of this review, a decision is made whether or not the project should continue, or whether the project should be delayed, revised or discontinued. (PMDPro 1)



Tip: Excel has a [project planning format](#) which helps to track your project by unique activities using the Gantt chart model. It allows you to easily see where each activity is according to plan.

- **Planning, Monitoring and Evaluation #** – collecting data, processing data, analyzing data, documenting results and communicating messages; includes risk identification, monitoring, mitigation and control
- **Communications** – Publication of project information leaflets or brochures, and of documents developed by the project such as manuals, technical guidelines, study reports, and policy briefs.
- **Procurement #** – the acquisition of equipment and materials.
- **Project Closure** – the end of project transition, including, but not limited to, administrative closure and contract closure. It takes time to close a project, so plan for it and do not leave it until the last month!

CAPACITY ASSESSMENT

SNV has a basic [capacity assessment tool](#) to identify, appreciate and plan for capabilities which are needed to achieve planned capacity development outcomes.

GENDER AND EMPOWERMENT

Use the [Gender and Empowerment Leading Questions](#) in support of planning for gender and empowerment results.

CREATE ONLINE PROJECT PME

The online PME format is designed to build an evidence base for results. You use it once maybe twice per year, depending on donor requirements for review and reporting.

Ask the Business Development Officer (Managing for Results focal point) to create the online Planning, Monitoring and Evaluation (PME) format for your project and to give you access to it. Check that you get the type of access that allows you to write/delete in the online PME format. All SNV employees can [view PME of all projects](#), but you can only add or change information for your project with "Manager/Editor" access.

PARTNER/DONOR ACCESS TO ONLINE PLANNING, MONITORING AND EVALUATION

We recommend working on Planning, Monitoring and Evaluation (PME) together with partners, as they may have information that you do not have easy access to.

The ICTHelpdesk@snvworld.org can add external people, such as partners and donors (or even potential donors!) to the User Directory so that they have access to the online PME format of your project.

LOGIN AND FILLING THE ONLINE PLANNING, MONITORING AND EVALUATION FORMAT

Use your SAP number and corresponding SAP password to login (same as login to your email and to the intranet) to the [PME website](#).

To fill the online PME format with your project information, you need the project results chain, logframe and indicators, baseline data and other project planning and monitoring documents. Have these available printed and also open the project folder on the "S drive". It is easier to refer to printed copies, and you can cut from the digital version and paste into the online PME format. For more instructions see the [Lean Guide to PME format](#).

The Planning, Monitoring and Evaluation Officer can help with data entry into the PME online system.

MONITORING PLAN (IN PME ONLINE FORMAT)

You need to plan your monitoring using the [online PME format](#) based on donor requirements, for instance annually or during mid-term review. The PME format enables you to monitor the result indicators (outputs, outcomes and impacts), changes in risks & opportunities, the results chain (the intervention logic) and the budget.

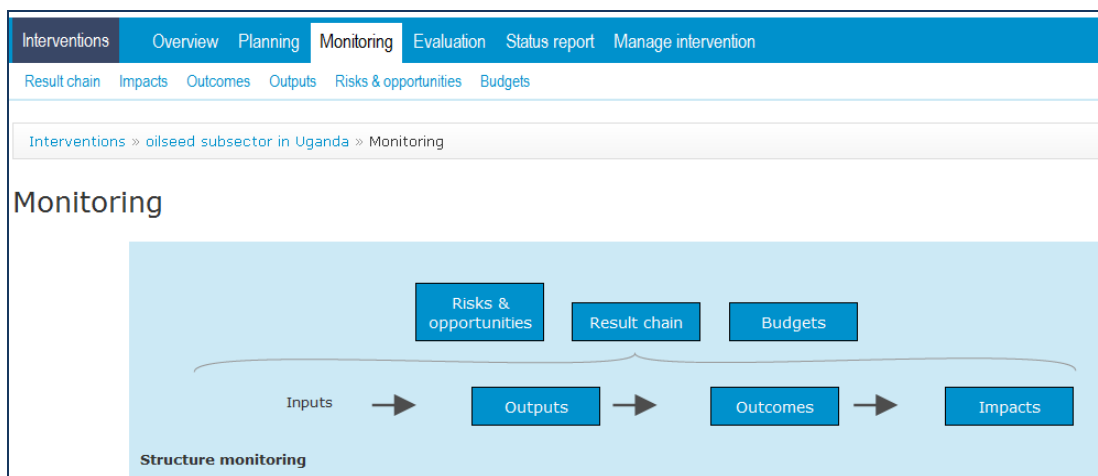


Illustration: Online monitoring

PME PLANNING

The planning or "P" part of the online PME format includes:

- An updated analysis of the current situation (actor constellation), and of the definition of what needs to be changed among whom and how (results chain and narrative).
- Which indicators will be assessed for each of the levels in your results chain (Impact, Outcomes, Outputs and Risks & Opportunities).
- The budget - meaning the costs of concrete deliverables or outputs, monitoring, and evaluations, and contributions from stakeholders.
- Stating what evaluation will be conducted for what purpose.

DEFINITIONS RESULTS CHAIN TERMINOLOGY

- **Input** - Input refers to the financial, human and material resources used to deliver a particular service or implement an activity or intervention.
- **Output** - Refers to the quality and quantity of SNV's services. Each *assignment* is assessed in terms of its outputs in qualitative and quantitative terms. The quality dimension indicates what has changed in the specific capabilities of the client (not in theory but in real-life daily operations).
- **Outcome** - SNV defines outcome as the improved performance of (groups of) client organisations or sector as a whole, in terms of delivery of basic services and value chains for the poor, and its related improved enabling environment. Outcomes are assessed against the objectives of the Memorandum of Understanding in relation to an overall client relationship. Such assessment can take place at key moments during the relationship and/or at the end.
- **Impact** - Positive and negative, primary and secondary long-term effects produced by a development intervention, directly or indirectly, intended or unintended. The desired development impact in SNV terms is defined as the improved use of Water Sanitation and Hygiene and Renewable Energy by the target population and the increased food security, income and employment of target population.



Tip: Use the [index](#) at the back of this manual to quickly find what you are looking for.

START-UP: FINANCE AND ADMINISTRATION

Work with the Finance Officer, latest before the [kick-off meetings](#), to:

- Establish delegation of authorities.
- Contract the implementing partners.
- Set-up the project filing system.
- Prepare detailed budget, organise time writing, and agree financial information needs
- Double check donor contract for compliance, e.g. with reporting, procurement and visibility guidelines.

DELEGATION OF AUTHORITIES

The project manager:

- Authorizes advance and expenses of project related travel for advisory staff < 700 EUR within the approved local travel budget, and as long as previous travel advances are settled
- Authorizes Program Support payments of both SNV core budget and project budget within approved budgets with single amount <EUR 2,500. Project Support in SNV means workshops, training and related costs.
- Authorizes instalment payments of consultants/ Local Capacity Builders contracts signed by the Country Director, and within the scope of the project
- Initiates and advises the Country Director on the [selection of consultants / Local Capacity Builders](#) within the project
- No purchase and selling of assets unless specific written approval from the Country Director.

PROCUREMENT

The project manager is authorised to as follows:

- **Procurement plan:** In coordination with Programme Assistant, and based upon your project budget, identify needs and prepare a bi-annual procurement plan. Send to Finance Officer (in January and July), who will get approval from CD.
- **Purchasing:** Prepare [Purchase Request](#) (note: form in annex!), with support from the Programme Assistant, and send this to the Finance Officer, who will process the request.
- **Acquisition:** Upon approval from Country Director, authorise purchase order [LINK](#) and purchase outside Hanoi (Finance Officer for purchase payment in Hanoi)

Note that the Programme Assistant takes care of petty cash and supplier payment.

REQUEST A PROJECT ASSIGNMENT NUMBER

Your project needs an Assignment Number (I/O internal order) so that it can be entered into the SNV SAP system for finance and administration. To avoid double naming of projects, check with the Finance Officer if your project already has an administrative or abbreviated name. If not, agree on the project name, and complete the [Mutation Form](#). Email the form to the Programme Assistant and Finance Officer with the request that a new Assignment Number be created for your project.

CREATE A PROJECT FILING SYSTEM

SNV Vietnam stores all project related documents in a private network drive accessible only in SNV offices called the "[S drive](#)", because its location is "S:\". Contact the IT administrator ictvietnam@snvworld.org to request the creation of a project folder, under the relevant sector and program file. When the new folder is created it will follow this naming structure:

S:\2. SNV Country Office\4. Programmes\Programme Name\VN_SECTOR_Project_Donor

An example of a project file name: VN_AFP_CassavaAcacia_Ford Foundation

The project file has seven sub-folders, structured as follows:

0. Proposal

- Proposal and contract with donor

1. Planning

- Sector studies, Sector Analysis, Value Chain Analysis
- Results Chain, Indicators, Theory of Change
- Actor Constellation,
- Baseline
- Monitoring Plan and/or Monitoring Guideline

2. Implementing / Includes but not limited to:

- TORs
- Work plans
- Meeting minutes

3. Monitoring / Includes but not limited to:

- Quarterly, Interim, Annual and Final Reports
- MoU Reviews and/or other reviews by SNV and clients/partners
- Client testimonials
- External monitoring

4. Evaluation

- Internal evaluation
- External evaluation

5. Finance

- LCB budget monitoring and LCB financial reports

6. Knowledge management / Includes but not limited to:

- PR and communication materials ; case studies; media clips
- Independent reports on the project

The structure to name a document is as follows: Document Title_Date created (yyymmdd) . An Example of a document name is: Project management manual_260912.

More detailed information about where and how to file project documents can be found in the [Filing Guidelines](#)

PROJECT FILING SYSTEM: ACCESS

You will save a lot of time if you set-up a shortcut to your project folder on your computer as follows:

- Open Windows Explorer
- Right click "Computer"
- Select "Map network drive"
- Choose an empty drive – e.g. "T"
- Copy the project folder, i.e. S:\snv.org.vn\snvdata\2. SNV Country Office\4. Programmes\Program Name\VN_SECTOR_Project_Donor
- ok

If you need to regularly work offline, outside the SNV office, we recommend that you activate an automatic synchronisation². Your project file will be available offline, and automatically synchronises with the S drive when you next connect to the SNV network. With the network cable plugged in at the SNV office, you can activate the synchronisation function as follows:

- Open "Sync Center" in Control Panel
- Select "Manage offline files", you will be prompted to restart computer
- Right click the S drive project folder you want to sync (e.g. VN_SECTOR_Project_Donor) and select "Always available offline"
- It will then sync a copy of that folder to your hard drive

You may need to visit the "Sync Center" occasionally to manually manage any conflicts. Ask the IT Officer for help if needed. **Beware:** this procedure may slow down your computer, so only do this if you often need access to the S:/ drive outside the SNV office.

HARD-COPY FILING

Ask the Programme Assistant and Finance Officer to coordinate the creation of a hard-copy file for the project. The hard copy file should contain the documents described below:

0. **Proposal:** Proposal and Donor Contracts[#] (final, signed originals)
1. **Implementation:**
 - Memorandum of Understanding, project agreements (e.g. Assignment Agreements, consultants / Local Capacity Builders contracts), official communication with the donor
 - Communication with the donor: financial[#] matters and project implementation
2. **M&E:** Annual results measurement
3. **Finance:** Financial reports[#], invoice[#]

[#] The Finance Officer is responsible for filing the correct, final and signed versions of any document marked with the hashtag (#). The Programme Assistant is responsible for filing all other documents and has ultimate responsibility for ensuring the completeness and accuracy of hard-copy filing.

BUDGET DETAILS AND FINANCIAL REPORTING

You will need to meet with the Finance Officer to discuss the details of your project budget and related donor financial reporting. Agree with the Finance Officer on the information you will need to receive periodically about your project budget. For instance:

- Fund balance
- Profit / Loss Account
- Timesheets
- Expenditures line item (details expenditure overview)
- Overview of fund receipts
- Report based on donor requirements (Expenditures per cost category and activity code)

² With thanks to Matt Carr

As the illustration shows, the current SNV financial system (Sambal) has a very limited number of costs categories, namely Programme Support, Consultants, Local Capacity Builders³ and Other Costs (mainly travel related). The system also accounts for staff time spend on the project in PPD or Primary Process Days, based on data from [Time writing](#).

Project Details Report

Data until period 7 of 2012

Vietnam Field Office

58.3 % of time passed

Per project		Prog.Supp.	Consultants	LCB	Other costs	TOTAL costs	TOTAL Income	IS PPD	NS PPD	Cons PPD	LCB PPD	Total PPD	Comments	
92421 AS-VN-WashAus-SS&H4A	Plan	10,000	48,811	10,000	4,000	72,811	-	-	32	290	80	402		
	Actual	-	598	17,759	-	5,767	6,397	-	-	40	96	-	136	
	Forecast	10,000	48,811	10,000	4,000	72,811	0	0	32	290	80	402		
92424 AS-VN-RERNE-ABP	Plan	-	34,175	-	-	34,175	-	-	-	134	-	134		
	Actual	-	29,459	3,147	3,460	36,065	-	-	-	142	74	216		
	Forecast	0	34,175	0	0	34,175	0	0	0	134	0	134		

Illustration: SNV financial system (Sambal)

SNV FINANCIAL SYSTEM

Input is via Excel sheets into the SAP server in Head Quarters. Output data is available online to all staff in [Business Warehouse](#). Business Warehouse reports are summarised in the monthly Sambal reports (see the illustration above), but the details are only available through Business Warehouse.

PARTNER BUDGET

In case the donor agreed that part of the budget be managed by the partner, the total subcontracted budget will be classified as SNV "Programme Support". SNV has the overall fund management responsibility, and will consolidate the budget, but the implementation and administration is done by the partner. Note that in this case there is no registration of Primary Process Days (PPD), and thus no [time-writing](#). The Finance Officer will book the lump sum cost reported by the partner into the cost account "Programme Support". Of course the financial report to donor will breakdown the expenses as per the approved budget.

TIME WRITING AND INVOICING REQUIREMENTS

SNV uses a capacity development strategy, and the bulk of project resources will therefore go to pay for staff salaries. In order to account for this time, SNV advisors write time using Adobe time writing per email.

The Programme Assistant will organise time writing for all team members, including for you – the project manager. All staff will receive a weekly email alert. As project manager, you will automatically also receive the time-writing from your team members for approval.

For project staff that is not full time on your project, your must check the time allocation based on the [monthly monitoring](#). The monitoring sheet ([illustration](#)) indicates under- and overbooking of time, so that you can take appropriate measures.

³ Local Capacity Builders have a separately cost category, due to SNV contractual obligations for core funding from DGIS. The promotion of Local Capacity Builders is an important pillar of SNV's strategy 2007 - 2015.

You can use the time writing data to discuss deviations with your team. The Finance Officer will use the time writing data in a progress update to the SNV Management team (every two months), and in reports to donor as required.

PARTNERS AND TIME WRITING

If your project subcontracts to a partner, their staff will be remunerated through the subcontracted budget. SNV will account for the partner budget under "programme support" ([illustration](#)), so there is no need to write partner's time (i.e. that would be double accounting).

CONSULTANTS / LOCAL CAPACITY BUILDERS AND TIME WRITING

The Programme Assistant will write time for project consultants and Local Capacity Builders who do not have access to SNV internal systems. In the [monthly monitoring](#) you must check completeness and correctness of this data.

PARTNERS, CONSULTANTS / LOCAL CAPACITY BUILDERS FINANCIAL GUIDELINES

[***Financial Guidelines for Clients and Local Capacity Builders \(in Vietnamese\)***](#)



Tip: The index references all staff positions in SNV. If you are not the project manager, you can use the indexed pages numbers for your Position Title to find out how you relate to the project manager.

PROCUREMENT

Usually, a contract with a donor will contain their procurement guidelines in an annex. Sometimes these are part of their financial guidelines more generally. Take a careful look, as often this section explains that depending on the price-point different steps must be taken, e.g. goods and services over \$5000 in value must go to public tender and obtain 3 quotes.

The key phrase to look out for is "the organisation may follow their procurement guidelines or policy". In this case, the [***SNV Vietnam Procurement Guidelines***](#) should be used.

You are not responsible for procurement, the Finance Officer is, but you do need to make a [procurement plan](#), check that procurement complies with donor requirements, and check during implementation that costs stay within your budget limits.

CONTRACTS WITH IMPLEMENTING PARTNERS

The project document specifies implementing partners, and the donor will have approved the partner selection and related subcontracted budget. It is likely that SNV signed a (pre-)Cooperation Agreement with the partner for project design (the Business Development Officer will know).

At the start of the project, it is important to review the roles and responsibilities of partners in the project. SNV uses the following documents to formalise the contractual relationship with the partner:

- [***Memorandum of Understanding***](#) defines the project results for which the partner is responsible, the resources needed for implementation, and the mutual responsibilities of the partner and SNV (including

reports and payments). This contract is signed for the duration of the project, as indicated in the project document.

- **Assignment Agreement** (an annual work plan) defines the activities and specific responsibilities of the partner and SNV for maximum one year. The Assignment Agreement communicates directly with the Memorandum of Understanding.

NOTES ASSIGNMENT AGREEMENT

The Assignment Agreement can also be used as a stand alone annual planning document. For instance in case of delegation of project implementation by a provincial authority (partner) to a specific department or district authority - you do not need to sign a separate Memorandum of Understanding (MoU) with lower level authorities, so long as the MoU with the partner indicates such delegation of project implementation.

The Assignment Agreement can also help to ensure consistency in planning substantial work of consultants / Local Capacity Builders that have not been designated as project partners in the project document.

DOUBLE CHECK DONOR CONTRACT COMPLIANCE

Check donor contract:	In place:
Contracts with implementing partners	Memorandum of Understanding has been signed with implementing partners as specified in the project document
Reporting schedule	<ul style="list-style-type: none"> • Narrative and financial reporting deadlines are marked in your – Project Manager - calendar, and entered in Sales Force by the Business Development Officer • Donor reporting templates have been discussed with the project team, Business Development Officer and Finance Officer, and have been saved in the project file as well as Sales Force
Procurement guidelines	You have confirmed with the Finance Officer which guidelines to use - donor or SNV, donor procurement guidelines have been saved in the project file
Financial invoicing requirements	Finance Officer is responsible, but you – Project Manager - have checked that donor requirements are followed, and where applicable have been saved to the project file
Communications and visibility requirements	<ul style="list-style-type: none"> • Communication and visibility requirements have been discussed with the project team and the Communications Officer, and have been saved in the project file • Project team understands the type of knowledge capture that is required, and has agreed how to regularly track lessons
Project adjustments	Process for making adjustments to the project, if allowed by the donor, has been discussed with the project team and the Business Development Officer

Note that **Donor Administrative Instructions** are available for your reference.

PROJECT IMPLEMENTATION

IMPLEMENTATION: TEAM AND PARTNERS

- Manage personnel and consultants/Local Capacity Builders performance.
- Encourage regular reflection and peer-to-peer consultation by advisors.
- Maintain relationships with key stakeholders, including donors.

PERFORMANCE MANAGEMENT

At the core of SNV's Performance Management approach is the understanding that setting objectives and supporting and motivating employees to achieve them requires a focus on results, constant dialogue and a good relationship between employee and manager throughout the year:

- Resolve internal conflicts among the project team. It is ultimately the project manager who is accountable if a project team has poor morale and is missing deadlines.
- Encourage [regular individual or peer group reflection](#) among the advisors in your team, especially during stressful and difficult times.

The SNV's performance management cycle helps the project manager and each individual team member to set and pursue the right targets and results:

- **Personal Results and Development Plan (PRDP)** by end January - Agree on key results the employee needs to deliver. This can be directly related to the work plan, but it is also possible to focus on other essentials like improving a relationship with a key partner, or capitalising on an opportunity that was not foreseen in the project document.
- **Mid-term Review** by end July - If you are stressed for time to hold individual conversations, consider organising one performance review session with the project team, including SNV full-timers who function part-time on your team.
- **Performance Appraisal Review (PAR)** by end December – Check performance against the Personal Results and Development Plan (PRDP). Discuss growth potential as well as next years Plan.

For detailed instructions follow [SNV's Performance Management Guidelines](#).

PART-TIME STAFF ON YOUR TEAM,

For SNV full-timers who function part-time on your team, coordinate performance management with their dedicated line manager (most likely the Sector/Programme Leader).

CONSULTANTS / LOCAL CAPACITY BUILDERS

At the end of the assignment, score the performance in this one-page form: [Results Evaluation Form](#).

STAFF CONTRACT MONITORING

Ask your questions about contracts extension or ending to the Human Resources Officer, who monitors this with Business Warehouse. All contract decisions are taken by the Country Director.

STAFF TRAINING AND LEARNING

Personal development benefits the project, so time agreed in the [Personal Results and Development Plan](#) can be allocated to the project.

MAINTAIN RELATIONSHIPS WITH STAKEHOLDERS

The [actor constellation](#) is designed to keep track of relationships with key stakeholders as the project evolves. Add emerging stakeholders, and delete stakeholders that are no longer relevant to achieving the project results.

Where appropriate, plan joint field visits with team members, consultants / Local Capacity Builders, to verify that project results are still valid, and that the stakeholders feel they are making progress.

DONOR RELATIONS

In order not to confuse communications with the donor, everyone in SNV (including the Finance Officer) relates with the donor via you- the project manager.

Not all donors will have a representation in Vietnam, but when they do, invite the donor to important project events, presentations and field trips.

You must enter key contacts and meetings in Sales Force, or ask the Business Development Officer to do so. Feel free to invite the Business Development Officer to donor meetings

TRAVEL AND PER DIEM

Use the [Travel and DSA Claim Form](#) for your team as well as third parties entitled to travel and DSA claims.

TRANSLATION

The Programme Assistant can provide interpretation/translation support in case of need. Large interpretation/translation assignments are outsourced.

COMMUNICATIONS

All publications and communication materials are to be vetted by Communications Officer following donor and SNV guidelines.

PRESS / MEDIA CONTACTS

The Communications Officer coordinate press / media contact, inventorises references to SNV in the press, maintains relations with the press, and may act as spokes person to the press, edits press releases if required. Questions or an interview request from a representative of the local media can be dealt with by the individual SNV staff member, after consultation with the Country Director.

IMPLEMENTATION: RESULTS

- Prepare two-monthly progress update for SNV Management team.
- Organise regular team meetings to manage towards impact.
- Projects monitoring in quarterly Sector/Programme meetings.
- Monitor with Planning, Monitoring and Evaluation (PME) format as per donor requirements.
- Manage risks and adjust to change as per donor contract.
- Arrange knowledge management and communication of evidence based results.

REGULAR TEAM MEETINGS

We would like to stress the importance of regular team meetings so that everyone in your team knows what is happening in the various project components, and uses this to work towards impact.

- **Progress:** Monthly, check progress against the annual work plan and Assignment Agreements. Quarterly, for instance prior to the sector/programme meeting, use the [actor constellation](#) and the project [results chain](#), together, as project progress monitoring instruments. The actor constellation represents the existing/changing capacities and relationships within which the project aims to achieve results; the results chain represents how the project will realize these results. Is the team still on track?
- **Accountability:** Discuss important deviations in budget and time, as discovered during [monthly or quarterly monitoring](#), and agree on actions to be taken.
- **Reflect & use:** reflective learning - actively reflecting on lessons learnt together with other stakeholders, must be an integral part of project implementation. [The SNV Way](#) recommends spending more in depth time once a month on the work of one of the advisors in the team, for instance with the [Impact Story](#). This tool helps to share how ongoing activities progress towards impact. Such a structured exercise helps problem solving and generates in-depth project knowledge.
- **Communicate:** Share evolving insights and milestones with relevant stakeholders, partners, donor, SNV colleagues, through meeting minutes or verbally.

GENDER AND SOCIAL INCLUSION AUDIT

SNV strategy emphasises gender equality and social inclusion. The [SNV Way Map](#) has team audit tools to specifically check results in these areas. If your team can use a performance boost, consider using SNV's [Gender and Social Inclusion Audit](#).

SNV SECTOR PROGRAM AND NETWORK

The Sector/Programme Leader **Error! Reference source not found.** provides overall technical leadership to achieve ongoing project objectives and results. S/he organises quarterly sector/programme meetings to review progress of all projects against annual work plan and project targets.

We would like to reiterate here that your project is part of a wider sector program in SNV. You are expected to pro-actively stay abreast with SNV developments and knowledge that could be relevant for your project, and to share project progress and business development opportunities. When the findings of [reflective learning at project level](#) are shared with colleagues of other interventions, programmes and countries, these also obtain access to valuable practise-based knowledge. This in turn is necessary for organisational learning, which is

essential for SNV to improve, innovate and scale up. Discuss with your Sector/Programme Leader how this sharing can work in practice.

BUSINESS DEVELOPMENT FOR SNV SECTOR/PROGRAMME

You are expected to share and follow-up on Business development Opportunities for SNV with your Sector/Programme Leader, in particular when it enhances the impact of your project. When time investments in SNV Business Development become substantial, it cannot be allocated to the project. SNV has a small core budget from which such investments could be funded at the discretion of the Country Director / Management Team.

PROJECT CASE STUDIES

We encourage advisors to regularly write about their work, and produce a case study at the end of the year. Writing stimulates practice reflection. There are [Case Study Guidelines](#), but if your advisors are not confident in writing, the Communications Officer can help to get their practice stories documented. SNV corporate uses such cases for the annual report, which could be an interesting way to promote your project.

ANNUAL RESULTS REVIEW

At the end of the year, before the annual project planning and development of new Assignment Agreements (work plans) with partners, you organise an annual results review. During this review, you monitor the results which were planned the [Assignment Agreement](#) and [Memorandum of Understanding](#), according to the monitoring plan in the Planning, Monitoring and Evaluation (PME) format. SNV has the following [Guidelines for results review](#).

IMPLEMENTATION: FINANCE AND ADMINISTRATION

- Manage and control contracting and procurement.
- Monthly monitoring of expenditures and team time writing, and budget forecasting.
- Quarterly progress update to SNV Management Team via Sector/Programme Leader.
- Quarterly project progress in sector meetings.
- External donor progress/narrative and financial reporting.

STAFFING PLAN UPDATES

The Finance Officer and Human Resources Officer prepare the [staffing plan](#), in consultation with you – the Project Manager. The staffing plan is agreed between Country Director and Project Managers in begin of the year.

OTHER HUMAN RESOURCES ADMINISTRATION

As project manager, you are responsible for approving staff leave using this [Leave Application Form](#). Check the leave entitlements with the Programme Assistant before approving the leave request. The Programme Assistant maintains sickness and leave administration for the project, and prepares quarterly sickness / leave reports for you.

The Programme Assistant will deliver relevant human resources data with regard to the project to the Human Resources Officer.

MONTHLY MONITORING: EXPENDITURES AND TIME WRITING

The Finance Officer will send you a reminder mail with hyperlink to do a [Monthly Monitoring](#). You need to monitor:

1. **Expenditures:** Check that the expenditures made for your project are correctly booked. Are any large sums missing? Are large sums charged to your project without your authorisation? Ask the Programme Assistant, who records financial transactions, to explain or change as required.
2. **Days overview:** While you do a weekly approval of [time writing](#) (automated mail), you must also do a monthly check to see if actual staff time allocations are on track. You must explain deviations from the staffing plan in the "remarks" column at the far right of the form (see [illustration](#))

It is important that time registration eventually is in line with the planning from the donor contract. Donors might not pay a surplus of days, and they may not pay us in full when there is a lack of days in the systems (this is often checked by Auditors!). Time monitoring and corrections is therefore an essential part of your responsibilities

In your [regular team meetings](#), discuss important budget and time deviations and agree on actions to be taken. The Finance Officer monitors time-writing for all projects, and informs the SNV Management Team on a monthly basis, including recommended action if needed (based on your remarks in the monthly monitoring).

INVOICE MONITORING

Invoices that are issued to the project are updated in an invoice monitoring file by the Programme Assistant, with regular review from the Finance Officer for a smooth cash flow planning.

TIME WRITING INVOICING TO DONOR

Depending on donor requirements, you must request the Finance Officer to prepare an invoice/report to claim/account for staff time. You must check the invoice/report before sending it to the donor.

SNV MANAGEMENT INFORMATION

The SNV Management Team uses a [Project Status Tracker](#), which requires a two-monthly project update as per the form shown here. Your Sector/Programme Leader is responsible to maintain the form, and to update it before every Management Team meeting.

Project status tracker

Project	Progress vs work plan on track delayed action to be taken	Financial Depletion on track delayed action to be taken	MfR baseline results- measurement evaluation	Contract management last report submission donor feedback	Donor relations embassy meeting donor meeting field visits	Partner relations planning on time review on time quality	Comms: brochure website events article/publicatio
Agriculture							
BMU-CCA-insurance	On track		Baseline done	Annual R Feb12	Meeting 3/12		
Ausaid-SRI-Rice	Start-up		Baseline				
Cordaid-Spices	Start-up		Baseline				
DFID-VBCF				Contracting	DFID	MPI, VBCSD	
Furoma-Penner				Contracting			

Illustration: SNV management information

QUARTERLY MONITORING: ADJUST BUDGET AND TIME FORECASTING

You will receive a quarterly budget versus expenditure overview, prepared by the Programme Assistant. Based on this overview, you will adjust (internal) budget forecasting and staff time planning for the projects.

The Finance Officer will prepare an invoice/ for projects in consultation with you. Donor formats will be used as required; otherwise we use [SNV Form for Financial Reports](#) as [agreed during start-up](#).

MONITORING: PROJECT FILE

Good filing systems are essential for audits and evaluations. To live up to the highest standards, the Programme Assistant will do a quarterly monitoring of the project file to ensure that you - the project manager - and your team [use the project file as required](#).

LOGISTICS

The Programme Assistant can make travel arrangement, attend to visitors, manage the program fleet, provide basic ICT support and arrange procurement, based on the authorization, guidelines and with the approval of the Project Manager.

DONOR REPORTING

You are responsible for submitting timely, complete and quality narrative and financial reports to the donor, as per the reporting schedule in the contract. Take note of the following:

- Review report contents – Sector/Programme Leader provides oversight
- The Financial report is prepared by the Programme Assistant upon timely request by you – the Project Manager
- The Finance Officer needs to do a compliance check and must approve the financial report before you send it to the donor

- Reports and reporting schedules are stored in Sales Force – The Programme Assistant provides these to Business Development Officer. The latter may alert you if your reports are late. (It is however *your* responsibility to make sure reports are on time!)
- For some projects it might be decided by the Country Director that narrative reports need to be approved by the regional programme leader or other senior SNV staff before you can send it to the donor.



Tip: Use the [index](#) at the back of this manual to quickly find what you are looking for.

PROJECT CLOSURE

It takes a few months to close a project, so make sure that all contracts are settled, activities completed, and expenditures made. By the project ending date specified in the donor contract. While some donors allow for "budget neutral" or "no cost" extension, the terms are deceiving –extension may not cost the donor, but it is costly for SNV, and needs to be avoided.

CLOSURE: TEAM AND PARTNERS

- Close all contracts and settle final contract benefits
- Conduct final staff performance review.
- Register suitable CVs
- Write letters of recommendation.
- Celebrate Accomplishments

END OF CONTRACT SETTLEMENTS

Project staff - You need to ensure that all project staff have been released or reassigned. The [exit checklist](#) ensures that all SNV property has been returned, and all employee entitlements have been settled. The paper is signed as per the responsibilities of you - the project manager, the Programme Assistant, the Finance Officer, the Human Resources Officer, and the Information and Communication Technology (ICT) Officer.

Partners - You need to ensure that Memorandum of Understanding and Assignment Agreements signed for project implementation have been completed and closed.

Consultants/Local Capacity Builders – You need to ensure that all contracts with consultants/Local Capacity Builders have been completed and paid.

FINAL PERFORMANCE EVALUATION

The final [Performance Appraisal Review](#) (PAR) is important to conduct, and should lead to an honest assessment whether SNV can hire the person in future. Project staff can use such a review for future job applications with SNV. The full PAR is too heavy for this purpose, so we recommend a light PAR.

EXIT INTERVIEW

The purpose of the [exit interview \(draft\)](#) is to get feedback from staff about their time with SNV, and to check if staff would like to be rehired in there is an opportunity.

REGISTER SUITABLE CVS

You need to ensure that CVs of consultants who may be interesting for future employment are registered by the Human Resource Officer in the DevHire CV database.

LETTERS OF RECOMMENDATION

A Letter of Recommendation can be provided to staff leaving SNV upon their request. For an example [click here](#).

CELEBRATE ACCOMPLISHMENTS

Celebrate and formally acknowledge the project ending by:

- recognizing the efforts of team members;
- acknowledging the contributions of key stakeholders to the project; and
- expressing appreciation to individuals and groups who were critical to the project success.

Recognising the project accomplishments within SNV and to the outside world facilitates positive public relations and prepares the way for future business opportunities.

CLOSURE: RESULTS

- Organise evaluation as per online Planning, Monitoring and Evaluation (PME) format and baseline.
- Document and disseminate lessons and results.
- Prepare for scaling or exit.
- Present final project results to partners, donors and other stakeholders.

PROJECT EVALUATION

During the start-up phase, you have captured what you were going to evaluate at the end of the project – use your [baseline](#) and evaluation questions as planned during start-up in the [online PME format](#).

DONOR EVALUATION

Check if your project has budgeted for an external evaluation, and whether the evaluation of your project is to be conducted either in the final stages, or at the very end of the project.

SNV ORGANISED EVALUATION

If you are organising the evaluation, SNV has a standard draft [Terms of Reference for Evaluators](#) - international M&E expert, and for [National M&E Expert](#).

KNOWLEDGE CAPTURE / LESSONS LEARNED

Lessons learned are SNV's institutional memory. During [regular team meetings](#), through [case studies](#), or at major reviews throughout the project you will have tracked lessons learned as they occurred. At the end of the project, it is important to ensure that the lessons learned related to the project are adequately detailed, and are [filed and easily accessible](#). Lastly, it is critical that you distribute the lessons learned to those who can benefit from them. Assure that learning is disseminated as agreed in the project document. (PMDPro 1)

The Communications Officer supports knowledge development by providing advice and circulating relevant materials.

DONOR RELATIONSHIP MANAGEMENT

The Business Development Officer will become more involved with donor relations towards the end of the project, and will take responsibility for maintaining donor relations after the project ends.

You need to ensure that:

- project reports and closure documents are complete
- the donor has reviewed and accepted the project deliverables

PREPARE A PROJECT RESULTS PRESENTATION

Work with the Business Development Officer and the Communications Officer to organise a final presentation of project results to the donor.

CLOSURE: FINANCE AND ADMINISTRATION

- Ensure that all expenditures can be made before end of contract.
- Final reporting to donor.
- Organise audit as per contract requirements.
- Archive project files as per donor and SNV requirements.

SPENDING BEFORE CONTRACT ENDING

It may seem obvious that your project budget needs to be spend before the project contract ends, but it is common to overlook project commitments that take time to be completed. For instance a subsidy for a biogas plant only gets paid after the first maintenance. If biogas plants are constructed in the last month of the project, the subsidy payment will be done after project ends. Other examples are the proper write of of stocks, debtors, creditors, payments of pension funds, severances etc. and all other payments made after contractual ending date, even staff time for reporting. Such costs will be disallowed by donor and will then have to be covered by SNV funds

It is you responsibility that all payables have been paid well before project end.

PROJECT ASSETS

Project equipment, vehicles, offices have to be reallocated, sold, or transferred as per the donor contract and before the contract ending date.

FINANCIAL CLOSURE

It your responsibility to see to it that the Programme Assistant and Finance Officer arranged financial report and audit as required by donor within the deadline, and that final bank transfer and closure be arranged if applicable.

Financial Closure checklist (PMDPro1):

- Has all permitted funding been received from the donor?
- Have all receivables (project advances, travel advances, and advances to suppliers) been liquidated or transferred to another project number or accounting code?
- Have all payables been paid?

AUDITS

You will need to request the Finance Officer to arrange an annual external audit, and you must coordinate these audits.

ARCHIVING

You need to ensure that project archives and/or [project files](#) are up to date.

INDEX



Tip: In this index, the letter type indicates:

- reference to the page of this word in the text
- **Reference To The Page Where This Document Is Hyperlinked**



Tip: The [online SNV Glossary](#) contains terms and abbreviations often used within SNV.



Tip: The index references all staff positions in SNV. If you are not the project manager, you can use the indexed pages numbers for your Position Title to find out how you relate to the project manager.

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