

The Job of the Project Manager^{1, 2}

Robert Youker

Introduction

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 he or she must perform and what is their authority and responsibility that should be documented in a Project Brief or Project Charter. Yet in the literature of Project Management there are few references or specific examples of these much needed details. This paper presents examples of three key documents relating to the Project Managers job. The contents are appropriate in any project where a fairly high degree of "ceremony" is required to keep proper track of all responsibilities. While these three documents serve different purposes, there are obviously overlaps, as well as similarities and differences between them:

1. The Project Manager's on-the-job tasks
2. A list of duties or Terms of Reference and
3. A Project Charter defining organizational relationships.

Document #1 is a list of tasks organized by the typical sequence of activities on a project. The list has been derived from the titles of twelve modules contained in a training package on *Managing the Implementation of Development Projects* developed for the World Bank Institute. The list assumes that the Project Manager was not appointed until the start of the Implementation Phase and so has not previously been involved in project preparation activities.

Document #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 is 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 should be useful in recruiting Project Managers and defining their job responsibilities, typically in a job description.

Document #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-à-vis the functional managers in the organization in a matrix structure. Again the details would be different for different organizations and specific project situations.

I hope that these three documents will serve as drafts for organizations preparing their own Checklists, Terms of Reference and Project Charters.

¹ Second Editions are previously published papers that have continued relevance in today's project management world, or which were originally published in conference proceedings or in a language other than English. Original publication acknowledged; authors retain copyright. This paper is an update of a paper prepared for the June 2002 IPMA Conference in Berlin. It contains content from various training materials developed for the World Bank. The current paper is copyright to Robert Youker, © 2007.

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Document #1: On-the-job tasks for the Project Manager

This Document #1 is a list of tasks organized according to the typical sequence of activities on a project. The list assumes that the Project Manager was only appointed at the start of the Implementation Phase and so is not familiar with any of the previous activities. Hence, the heading for the first step is to study the existing documentation and find out what the project is all about.

As I said, these documents are part of the World Bank Institute's, *Managing the Implementation of Development Projects*, and it is available as a Resource Kit for Instructors on CD-ROM. For information please contact John Didier at jdidier@worldbank.org. The kit is divided into Modules each of which include very detailed list of tasks that form useful checklist for the Project Manager, the project team and the rest of the organization including functional managers.

The twelve Modules are as follows and their respective detailed activities are presented in subsequent pages:

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 (including Performance and Quality)
10. Organizing Procurement
11. Executing and Controlling the Work
12. Terminating the Project.

Module 1: Understanding the Project and Project Management

This Module's activities are:

- 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.
- 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 to management a reappraisal of the project.

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

This Module's activities are:

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 span sub phases, milestones, and decision gates) for the implementation phase of the project life span.

Identify where a project is in its life span.

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

This Module's activities are divided into three subsections: Planning, Scheduling, and Using computers

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

This Module's activities are:

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 decision makers.

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

This Module's activities are:

- 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.

Document #2: The Project Manager's Duties

The purpose of this document is to show how 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

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

Document #3: Typical Elements in a Project Charter

The Project Charter is an essential document necessary for successfully managing a project. 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."

The issue is, does the Project Charter makes it clear whether or not the project manager has management's support to run his or her project as they see fit – or does someone else!

Authority

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

Responsibility

The project manager's responsibilities are to the chief executive, senior manager, or sponsoring director, 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 a number of key areas as shown below.

A) 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

B) Establishing and maintaining the project plan

1. Establishing project plans through the coordinated efforts of the organizations involved in the project
2. Providing leadership in the preparation of operational requirements, specifications, and bid packages and change control
3. Active participation in major management and technical decisions
4. Allocating and controlling the use of funds on the project

C) Managing and controlling the project

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

D) Communicating project status

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

About the Author



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Robert (Bob) Youker is an independent trainer and consultant in Project Management with more than forty years of experience in the field. He is retired from the World Bank where he developed and presented six week project management training courses for the managers of major projects in many different countries. He served as the technical author for the bank on the Instructors Resource Kit on CD ROM for a five week training course on Managing the Implementation of Development Projects. He has written and presented more than a dozen papers at the Project Management Institute and the International Project Management Association (Europe) conferences many of which have been reprinted in the Project Management Institute publications and the International Journal of Project Management (UK).

Mr. Youker is a graduate of Colgate University, the Harvard Business School and studied for a doctorate in behavioral science at George Washington University. His project management experience includes new product development at Xerox Corporation and project management consulting for many companies as President of Planalog Management Systems from 1968 to 1975. He has taught in Project Management Courses for AMA, AMR, AED, ILI, ILO, UCLA, University of Wisconsin, George Washington University, the Asian Development Bank and many other organizations. He developed and presented the first Project Management courses in Pakistan, Turkey, China and Africa for the World Bank.

A few years ago Mr. Youker conducted Project Management training in Amman, Jordan financed by the European Union for 75 high level civil servants from Iraq who implemented the first four World Bank projects in Iraq. He is a former Director of PMI, IPMA and IPMA-USA. Most recently he has been consulting for the US Government Millennium Challenge Corporation on project management training in Africa. Bob can be contacted at bobyouker@att.net