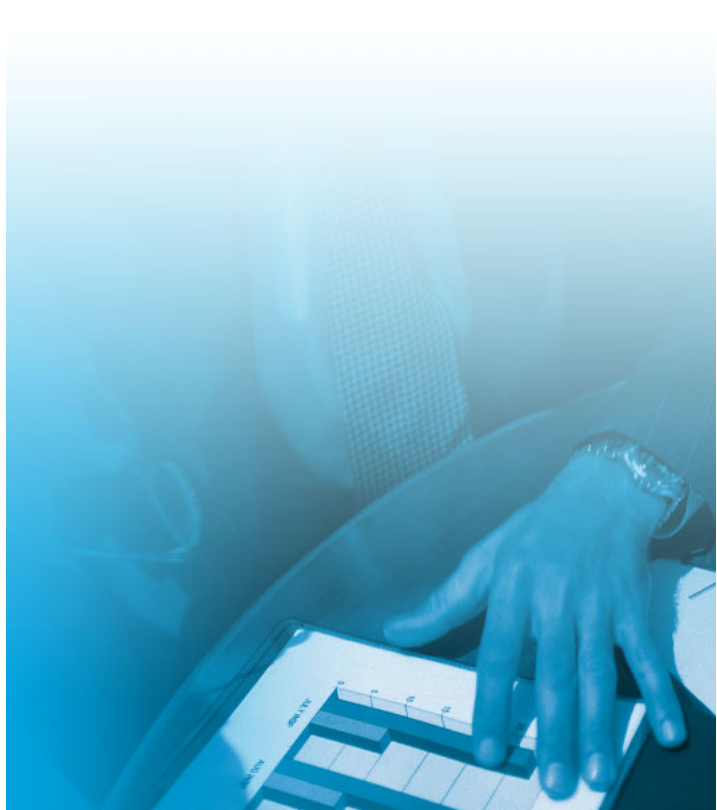**AFOA**

Aboriginal Financial Officers Association of Canada

*The best source of information and training
on Aboriginal finance and management*

Project Management

A Practical Guide for Aboriginal Management

The Aboriginal Finance and Management
Capacity Development Series

AFOA

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Project Management

A Practical Guide for Aboriginal Management

Table of Contents

Introduction

The primary purpose of this document is to provide administrators, managers, and staff an overview of Project Management and its numerous components. There is also an overview of the key areas of administrative development, an important component in the management of any project/program using Project Management fundamentals.

Project Management is often comprised of a number of components that may be dependent on several factors. These include the project's size, its timelines, costs, funding, funding sources, etc. However, the principals of project management fundamentally remain the same for any and all projects no matter the size, complexity or the team members involved in the process. The fundamentals and elements can be adapted to suit the needs of an organization's internal reporting and administrative structure. For example, First Nations organizations must frequently manage their programs based on the specific criteria established by the funding source for a project.

Effective project management will ensure that a project continues on schedule, remains within budget, meets its predetermined objectives, and is successfully completed as planned.

I Principals & Key Elements of Project Management:

i Principals of Project Management

a Commitment

It is imperative to ensure that all parties are committed to the success of the project. *Commitment* is defined as being **committed to:**

- Completing and submitting the initial project funding application, and determining the funding requirements.
- Providing the necessary tools and resources to meet the needs of the project.
- Providing the human resources required to deliver the required services and to meet the timeline for the project. This includes identifying and/or hiring a specific project manager or professional.
- Administering the project effectively and efficiently, and monitoring the progress towards set goals and objectives.

The commitment to proceed with any project is ideally identified through a strategic plan or community plan, or from an identified need that arises through community consultation. The commitment should be documented through Council resolution or meeting minutes, and should be kept on file for future reference.

b Organization & Timing

Organization of the project includes managing the time, the resources, and the funding, and meeting the overall goals and objectives of the project. *Organization & timing is:*

- Preparing the action plan, the specific steps involved in the implementation of the project (phases), as well as the specific timelines (outlined by date) for each phase.
- Aligning the team members, providing detailed tasks, directions and expectations. Ensuring that all team members have a clear and concise understanding of the overall project.
- Developing the monitoring procedures, including the schedule for team meetings and the measurements for determining success levels.
- Developing administrative processes, file maintenance, and financial accountability – i.e. who is responsible.
- Determining the communication process, including how information will be delivered, who needs to know, and what form/s of communication will be utilized throughout the project (i.e. meeting minutes, e-mails – cc's, letters).

The best way a project manager can remain well organized and in control is by developing and maintaining a good project file in a logical and user-friendly manner. The project file is a collection of all of the data, documents, budgets, contracts, and funding agreements pertaining to the project. A classification folder will help to keep a project file in order.

A well maintained project file should contain the following:

1 All relevant information, important facts, decisions, commitments and contracts concerning the project.
2 Copies of all principal documents (e.g. approvals, letters, minutes, forms, BCR's) pertaining to the project.
3 A record of the project's history and current status (updated frequently).
4 An accounting of the finances, and copies of the original budget.
5 Any communications or meeting minutes pertaining to the project.
6 Any additional information requested by related parties and in compliance with any agreements.

A classification folder can be a useful tool:

- Determine the number of elements/components in the project and purchase a folder that meets those requirements (usually 5-7 sections).
- Secure all pertinent information in the appropriate sections of the folder.
- Clearly label the folder, and all tabs (i.e. contract, budget, work plan etc.).

c   Monitoring & Reporting

Establishing the monitoring process and reporting requirements is a key element to effective project management. Establishing effective *monitoring and reporting requires:*

- Preparing a schedule/timeline for project completion. This can be effectively accomplished by using a technical tool. There are several products available that can be customized to each project and to project team members.
- Clearly predetermining the measurements of success or the completion of each phase of the project.
- Scheduling regular meetings and updates with all project team members. This provides an opportunity to reassess and to reappoint tasks if required.
- Maintaining the project file. The project manager should file and maintain all information and data gathered throughout the project.
- Producing routine progress reports for management, Council and/or a related party (in a predetermined format, i.e. report template, meeting minutes, copies of project deliverables, etc.).

d   Budgeting and Financial Management

Properly maintaining the budget and sustaining the project's financial commitment requires constant monitoring. During the organizational phase of the project management process, maintenance of the financial component of the project file should be clearly outlined. Authorizations must be established for expense approvals and for financial coding systems to ensure that all expenditures are appropriately processed. Departmental budget reviews should be scheduled on a regular and ongoing basis and, above all, it is imperative that the accounting department be cognisant of the requirements and limitations of the funding.

Financial management practices of project management include:

- Developing and maintaining a detailed budget.
- Maintaining and filing copies of all invoices and endorsed and approved contracts in the project file.
- Setting up accounts specifically for the project and coding them in a manner that distinguishes them from other programs and operations.
- Ensuring that any reallocations or amendments to the original budget are properly documented and approved by all related parties.
- Filing project reviews and meeting minutes in the project file, and ensuring they are signed as accepted and reviewed by Council or Management.
- Maintaining copies of a transfer of funds, cheques, and/or guarantees on file (in the case of funds being received from outside agencies).
- Reviewing, at least monthly, budget to actual. The project manager or coordinator should conduct the review and bring forward any discrepancies to Council and/or management in a timely manner.
- Copying and maintaining on file any BCR (Band Council Resolution) that has been provided in support of the project with a monetary value (the finance department records BCR's separately for audit purposes).

Both the project manager and the finance personnel should have a thorough understanding of the financial commitment from the First Nations perspective as well as from any other funding agency involved in the project. In the majority of cases, there is a contribution arrangement that stipulates the *funding provisions*. The contribution arrangement will outline, in detail, the terms and conditions of the funding, the flow of disbursements, the reporting requirements, and any specific compliance requirements. All personnel involved with financial accountability should review this area of the agreement. Budgeting and financial management is the key to a successful project, and, if well managed, will ensure that eligibility for any additional sources of project funding is maintained.

ii   Key Elements of Project Management

a   Initiation

The Initiation process begins with the recognition and the commitment to begin a project phase. The process can be started by a *call for proposals*, by a request for an *expression of interest*, or, in some cases, simply by an identified need of the community/organization. In whichever manner a project begins to be discussed or a funding application is initiated, this is phase one of any project.

During the initiation phase management or Council may direct a project manager to research options, to gather related information and data, and to make a recommendation to proceed to the planning phase.

In some cases a project may not be formally initiated until after a feasibility study, preliminary plan, or analysis is conducted. This is usually linked to the project funding, or to the strategic plan of the organization/community.

b   Planning

The planning phase involves devising and maintaining a workable scheme to accomplish the identified goal and to meet the needs of the organization/community that the project was undertaken to address. This phase usually involves a written document, or work plan that has been appropriately authorized. The work plan should outline the scope of activities, the deliverables, the inputs and outputs, the budgets, the team and related parties, and the timelines.

The complexity of the plan is dependent upon the size of the project. In the case of First Nations it could be a capital project that requires a very detailed plan. There could be several detailed phases, limited funding, specified objectives and criteria, and possibly a short time frame.

There could be contractors involved, and perhaps the project may entail offering students summer employment. It is through the planning process that unidentified needs are uncovered and addressed prior to commencement of the project. For example, the project may require a specific skill, equipment, technical support and training, and specific funding criteria. The planning process provides the opportunity to address and to manage these components.

c   Production/Execution

The production/execution phase involves coordination of the various resources (people, funding and related parties) to carry out the plan as it has been developed and approved.

With the completion of the project plan, the phases of the project identified, and the team assembled, the project is ready to begin its first phase. At this stage it may be beneficial to bring the team together again in order to allocate tasks and to make sure that all team members understand their key areas of responsibility. All members should be aware of the project's timeframe and be clear as to the expectations of their role in the overall project. A fundamental key to the success of the project is that all members of the team are ready, willing and able to participate and understand fully their role within the project.

d   Monitoring/Controlling

The monitoring/controlling phase of the project involves ensuring that the project objectives are met. This is accomplished by monitoring and measuring progress and by taking corrective action when necessary.

It should already have been determined during the planning process how the success of the project would be measured and how the goals and objectives of the project would be achieved.

First Nations organizations are principally accountable for monitoring the status of the project and for preparing interim and final reports. This task is easier to manage when the information is maintained accurately and up to date throughout the project. Documenting the progress of the project by means of a project management tool or graph will assist in tracking the progress of the project and also make it easier to communicate this information to other members of the project team.

All monitoring activities should be kept in the project file to demonstrate, in the case of an audit or project review; that the project was actively monitored and that any areas of weakness were addressed.

In the event that a project does not progress as scheduled, or the timeframe does not remain on track, consistent monitoring provides an opportunity to make recommendations to the related parties and to request an amendment or restructuring of the project. The focus of project management is to remain on task and to avoid any last minute changes that may jeopardize the project and the funding. If a project is managed and monitored efficiently and effectively, there should not be any last minute scrambling to meet the project objectives.

e   **Completion & Evaluation**

The completion & evaluation phase of the project involves meeting the goals and objectives of the project, completing the deliverables, conducting final measurements, and completing the financial reconciliation.

A final wrap up meeting with the team members is a good opportunity to review the successes and challenges of the project, and to determine if there is an opportunity or case for pursuing additional projects or for maintaining the service or product derived from this project.

For administrative purposes, it is best to retain the project file for a minimum of 1 year (unless otherwise dictated by the contribution arrangement), ensuring that all documents are filed and saved, and final review comments completed by the project manager before the file is closed. Final comments from the project manager, provides information for anyone who may pick up the file at a later time.

The project checklist should include a section for final comments, and a sign off by Council or management concluding the project.

The project manager may also be requested to provide a summary and to report to the community on the completion and success of the project, particularly in the case of the project being initiated from a community or from a strategic plan.

II   Sample Project Management

Project #1 – minimal in size, short time frame, specific criteria, and fewer than 5 people involved

Scenario:

ABC First Nation receives a letter advising that funding is available to sponsor two youth for summer employment opportunities. The funding is available if ABC First Nation submits an application and work plan by no later than May 1st. The application must clearly state the employment opportunities available, and must also identify two First Nation applicants who fit the criteria as outlined.

ABC Council reviews the letter at their weekly meeting, agrees to make application, and provides a directive to the Office Administrator to pursue the opportunity.

Key Element	Process/Action
Initiation	• Council provided a directive to the Office Administrator to prepare the application • The Office Administrator reviews the application and determines that they have the capacity to meet the requirements • The Office Administrator ensures that there are at least two youth interested in summer employment • The Office Administrator Identifies two short term employment opportunities within the organization • The Office Administrator presents concept to Council – they approve
Planning	• Objectives and goals are developed to meet the current needs of the organization • Two short term positions are created, including job description, scope of activities, prerequisites, and workplan/schedule • The budget is outlined based on the funds available, and a small contribution for mandatory employee benefits is required by ABC First Nation • Application process is developed for interested students • Financial processes are established, a "pending" project file is set up
Production/Execution	• The application is approved, and a contract is delivered outlining the specific requirements and provisions pertaining to the funding • The Office Administrator (project manager) communicates the approval to all personnel involved in the project • The two students are hired, and begin their summer employment
Monitoring	• The contract requires an interim report, and evidence that the students are maintaining their work schedule • The project file contains copies of the timesheets for the two students, and the financial status of the project to date • The project manager meets with the two students to discuss their experience and progress – they review the workplan together

Key Element	Process/Action
Completion/Evaluation	• The employment opportunity ends, the two students complete their workplans and activities, a final interview is completed by the Office Administrator (project manager) • The final report is produced, including a financial statement of expenditures • The project manager reviews the file for completion, provides a summary and evaluation to Council about the project • The evaluation determines if the project met the planned objectives • The file is closed pending final payments

Project #2 – larger in scale, one-year timeframe, one time funding opportunity, specific objectives and criteria, requires hiring a consultant and two contract employees with specific skill sets

Scenario:

ABC First Nation has received a call for proposals for funding of up to $250,000.00 to develop an economic development opportunity in the forestry industry that involves partnering with a forestry company in their area. The forestry company is required to provide employment and training opportunities as a component of the project. ABC First Nation has no experience in forestry related businesses or partnerships. Prior to becoming eligible to apply for the funding, a feasibility study must be completed.

Key Element	Process/Action
Initiation	• Council provides directive and appoints Project Manager • Components of feasibility study are completed • Initial research and development is completed • Project manager prepares a recommendation to pursue project and develop proposal
Planning	• Phases of project are developed, goals and objectives are identified • Measurements of success are developed • Project team is assembled, consultant hired, and additional staff identified • Partner development is completed with subject clauses to the approval of the project funding • Employment opportunities are identified with partner, and training opportunities are also identified • File maintenance, communications strategy and H.R. management plan developed

Key Element	Process/Action
Production/Execution	• Approval of project is received • Partnerships are formalized and documents executed • All partners meet for initial execution of project plan – tasks are appointed • New employees are hired, consultant contract is finalized – associated files are created • Finance department staff create accounts and financial administrative processes • Authorizations are determined
Monitoring	• Project manager develops monitoring schedule • Meetings are conducted periodically with the full project team • Communications and meetings are recorded into the project file • Measurements of advancement towards the goals and objectives • Review of performance of the employees, consultants, as relates to the project • Financial reviews are conducted measuring budget to actual • Interim reports, and final reporting requirements are reviewed
Completion/Evaluation	• The project has reached completion, timeline is complete • Final deliverables are on file • The project manager reviews all file content to ensure all documents, contracts, and deliverables have been received • A final report is made to Council and Management • Partnership is completed, and signed off • Project team has a final meeting to review successes and challenges • Term employments are expired and final exit interviews are complete • Review with Council will determine direction for further project activities and success of project • All final reports are completed • File is closed, and signed off by Council and Management, retention of file is determined • Project Manager makes final comments in file.

III   Project Management – Tips & Tools

There are various technical tools available for download to assist with project management. The challenge is to find one that best suits individual needs and capabilities of the organization. A daily task manager (e.g., Microsoft Outlook) usually has a task manager function that can be adapted to an individual project and manipulated to record and to track information that may be required.

Capital Projects are much more detailed, and complex, and should be managed by a professional project manager, or personnel with associated experience and training in this particular area.

> Tool: First Nations and Aboriginal Communities Project Management Manual
>
> www.pwgsc.gc.ca/rps/inac/content/docs_technical_projectmgmt_intro-e.html
>
> This document is intended to assist First Nation project managers who are responsible for implementing capital construction projects in their communities. Procedures and principles discussed are intended to provide a management framework to use throughout a capital construction project.[1]

Meetings & Communications strategies should be developed and maintained throughout the project. Participation by all members of the team should be encouraged, so that there is no opportunity to miss out on updates or changes to the overall project plan. Meeting discussions should follow a set agenda, with additions made to accommodate any new business arising. It is recommended that meetings be recorded, and any action items that require follow-up also be recorded and followed by the project manager. If, during the planning process, a communications strategy was developed, ensure that it is followed. The communication strategy will outline what is communicated, who is to receive the information, and who is responsible for the production and distribution of the information. A flowchart can be created to help develop and demonstrate the communication strategy, and responsibility.

Developing a Project Management Checklist, a checklist provides a summary (snapshot) of the overall project. It should outline the following:

- Project title, start date, finish date
- The project coordinator, and project team members
- The value of the project, and funding sources
- The reporting requirements (by date)
- Key contacts – consultants, funding officers
- Specific file directions (i.e. Originals only, date rec'd)
- Final comments section
- Management or Council should sign off closing the file

The project management checklist should be filed in the front of the project file. If you do not have a project management process developed and adapted into your operations policy, it is a good governance initiative to develop for future projects.

See the following Project Summary sample.

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[1] *PWGSC*

Project Summary

Program Name:			Program #	
Funding Sponsor:				

Start date:		Completion date:	

		Actual completion date:	
Scope of Program			

Program Funding: *attach budget from propsoal/contribution agreement*

Funding sources:	Amount
First Nation Contribution: (if applicable)	
total	

Reporting:

Report	Date required:	date sent:	copy in file:	completed by:

Administration

Program Code	
Program budget	
Diary system	
File - created	

Reviewed by:

_____   date _____

Charting

Project timeline

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
	INITIATION										
		PLANNING									
				PRODUCTION							
				MONITORING							
										COMPLETION	
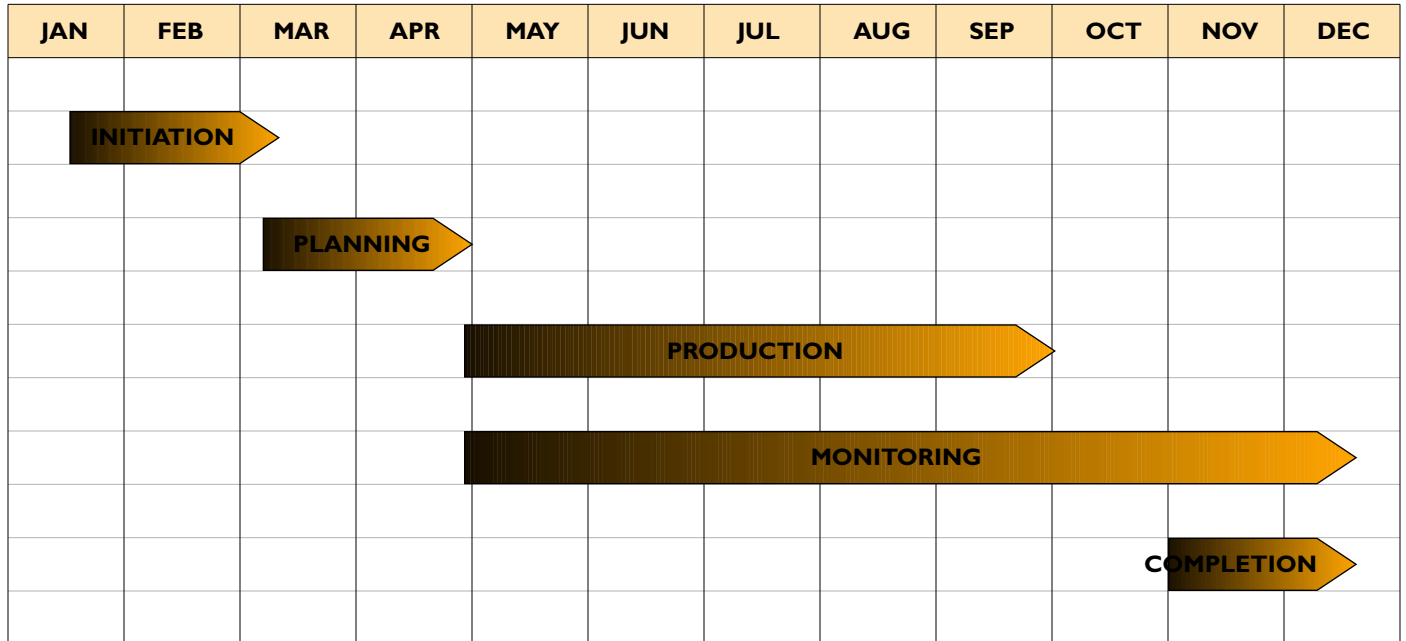
Charting is adapted to be general, as demonstrated above, or additional information such as specific tasks, team members, and timelines can be added to the graph. Any visual instrument used to assist in monitoring the project will be a useful tool, and will demonstrate active monitoring of the project.

IV   Glossary of Terms

Activity An element of work performed during the course of a project. An activity normally has an expected duration, expected cost and expected resource requirements. Activities are often subdivided tasks.

Actual Cost of Work Performed (ACWP) Total costs incurred (direct and indirect) in accomplishing work during a given time period.

Actual Finish date (AF) Actual point in time that work ended on an activity. (Note: in some application areas, the activity is considered "finished" when work is "substantially complete.")

Band Chief and Council The Band Chief and Council are the project manager's authority insofar as projects referred to in this manual are concerned. These persons should be interested in the broad and fundamental issues (e.g. what must be done, when it is needed, how it will be paid for) affecting the project.

Band Manager The Band Manager's role in project management is usually one of providing the project manager with advice and support on such things as community hiring policy, contracting, purchasing and administrative practices. (Note: In some instances and particularly on smaller projects, the band manager may play a larger role in representing the Chief and Council and supervising the project manager.)

Bar Chart A graphic display of schedule-related information. In the typical bar chart, activities or other project elements are listed down the left side of the chart, dates are shown across the top, and activity duration are shown as date-placed horizontal bars. Also called a Gantt chart.

Baseline The original plan (for a project, a work package, or an activity), plus or minus approved changes. Usually used with a modifier (e.g., cost baseline, schedule baseline, performance measurement baseline).

Budget Estimate *see estimate*

Budgeted Cost of Work Performed (BCWP) Sum of the approved cost estimates (including any overhead allocation) for activities (or portions of activities) completed during a given period (usually project-to-date) see also earned value.

Calendar Unit The smallest unit of time used in scheduling the project. Calendar units are generally in hours, days, or weeks, but can also be in shifts or even in minutes. Used primarily in relation to project management software.

Chart of Accounts Any numbering system used to monitor project costs by category (e.g., labour, supplies, materials). The project chart of accounts is usually based upon the corporate chart of accounts of the primary organization.

Code of Accounts Any numbering system uniquely identify each element of the work breakdown structure.

Consultant Consultants are private firms that are in the business of providing professional services (e.g. design, project management, construction inspection, advice). Consulting firms employ professionals (e.g. engineers/architects) and support staff having the training and expertise to perform this work. Engineers and architects are controlled and licensed by provincial professional associations who are chartered by provincial legislation to perform this control function.

Communications Planning Determining the information and communications needs of the project stakeholders.

Contingency Planning Development of a management plan that identifies alternative strategies to be used to ensure project success if specified risk events occur.

Contingency Reserve A separately planned quantity used to allow for future situations that may be planned for only in part. For example, rework is certain; the amount of rework is not. Contingency reserves may involve cost, schedule or both. Contingency reserves are intended to reduce the impact of missing cost or schedule objectives. Contingency reserves are normally included in the project's cost and schedule baselines.

Contract A contract is a mutually binding agreement that obligates the seller to provide the specified product and obligates the buyer to pay for it. Contracts generally fall into one of three broad categories, fixed price or lump sum contracts, cost reimbursable contracts, and unit price contracts.

Control The process of comparing actual performance with planned performance, analyzing variances, evaluating possible alternative, and taking appropriate corrective action as needed.

Control Charts Control charts are a graphic display of the results, over time and against established control limits, of process. They are used to determine if the process is "in control" or in need of adjustment.

Cost Performance Index (CPI) the ratio of budgeted costs to actual costs. CPI is often used to predict the magnitude of a possible cost overrun using the following formula: original cost estimate/CPI = projected cost at completion.

Cost Variance (CV) any difference between the estimated cost of an activity and the actual cost of that activity.

Critical Path In project network the series of activities that determine the earliest completion of the project. The critical path will generally change from time to time as activities are completed ahead of or behind schedule. Although normally calculated for the entire project, the critical path can also be determined for a milestone or subproject.

Current Finish Date The current estimate of the point in time when an activity will be completed.

Current Start Date The current estimate of the point in time when an activity will begin.

Deliverable Measurable, tangible, verifiable, outcome, result, or item that must be produced to complete a project or part of a project.

Estimate An assessment of the likely quantitative result. Usually applied to project costs and durations and should always include some indication of accuracy.

Estimate of Completion (EAC) the expected total cost of an activity, a group of activities, or of the project when the defined scope of work has been completed. Most techniques of forecasting EAC include some adjustment of the original cost estimate based on project performance to date.

Estimate to Complete (ETC) the expected additional cost needed to complete an activity, a group of activities, or the project. Most techniques for forecasting ETC include some adjustment to the original estimate based on project performance to date.

Exception Report Document that includes only major variations from plan (rather than all variations).

Fast Tracking Compressing the project schedule by overlapping activities that would normally be done in sequence, such as design and construction.

Finish Date A point in time associated with an activity's completion. Usually qualified by one of the following: actual, planned, estimated, scheduled, early, late, baseline, target or current.

Functional Manager A manager responsible for activities in a specialized department or function (e.g. engineering, manufacturing, marketing).

Gantt Chart *See bar chart.*

Information Distribution Making needed information available to project stakeholders in a timely manner.

Initiation Committing the organization to begin a project phase.

Management Reserve A separately planned quantity used to allow for future situations that are impossible to predict (sometimes called "unknown unknowns"). Management reserves may involve cost or schedule. Management reserves are intended to reduce the risk of missing cost or schedule objectives. Use of management reserves requires a change to the projects cost baseline.

Matrix Organization Any organizational structure in which the project manager shares responsibility with the functional managers for assigning priorities and for directing the work of individuals assigned to the project.

Milestone A significant event in the project, usually completion of a major deliverable.

Milestone Schedule A summary-level schedule which identifies the major milestones.

Modern Project Management (MPM) a term used to distinguish the current broad range of project management (scope, cost, time, quality, risk, etc.) from narrower, traditional use that focused on cost and time.

Monitoring Capture, analysis, and reporting of project performance, usually as compared to the plan.

Percent Complete (PC) and estimate, expressed as a percent, of the amount of work that has been completed on an activity or group of activities.

Performance Reporting Collecting and disseminating information about project performance to help ensure project progress.

PERT chart A specific type of project network diagram. Refer to Program Evaluation and Review Technique.

Procurement Planning Determining what to procure and when.

Program A group of related projects managed in a coordinated way. Programs usually include an element of ongoing activity.

Program Evaluation and Review Technique (PERT) An event-oriented network analysis technique used to estimate project duration when there is a high degree of uncertainty with the individual activity duration estimates. PERT applies to critical path method to weighted average duration estimate.

Project A temporary endeavour undertaken to create a unique product or service.

Project Communication Manager A subset of project management that include the processes required to ensure proper collection and dissemination of project information. It consists of communication planning, information distribution, performance reporting, and administrative closure.

Project Cost Management A subset of project management that includes the processes required to ensure that the project is completed within the approved budget. It consists of resource planning, cost estimating, cost budgeting, and cost control.

Project Human Resource Management A subset of project management that includes the processes required to make the most effective use of the people involved with the project. It consists of organizational planning, staff acquisition, and team development.

Project Integration Management A subset of project management that includes the processes required to ensure that the various elements of the project are properly coordinated. It consist of project plan development, project plan execution, and overall change control.

Project Life Cycle A collection of generally sequential project phases the name and number of which are determined by the control needs of the organization or organizations involved in the project.

Project Management (PM) the application of knowledge, skills, tools, and techniques to project activities in order to meet or exceed stakeholder needs and expectations of the project.

Project Phase A collection of logically related project activities, usually culminating in the completion of a major deliverable.

Project Plan A formal, approved document used to guide both project execution and project control. The primary uses of the project plan are to document planning assumptions and decisions, to facilitate communications among stakeholders, and to document approved scope, cost and schedule baselines. A project plan may be summary or detailed.

Project Plan Development Taking the results of other planning processes and putting them into a consistent, coherent document.

Project Plan Execution Carrying out the project plan by performing the activities included therein.

Project Planning Development and maintenance of the project plan.

Project Procurement Management A subset of project management that includes the processes necessary to obtain goods and services from outside the performing organization. It consists of procurement planning, solicitation planning, solicitation, source selection, contract administration, and contract close-out.

Project Quality Management A subset of project management that includes the processes required to ensure that the project satisfies the needs for which it was undertaken. It consists of quality planning, quality assurance, and quality control.

Project Risk Management A subset of project management that includes the processes concerned with identifying, analyzing, and responding to project risk. It consists of risk identification, risk qualification, risk response development, and risk response control.

Project Schedule The planned dates for performing activities and the planned dates for meeting milestones (deliverables).

Project Scope Management A subset of project management that includes the processes required to ensure that the project includes all of the work required, and only the work that is required to successfully complete the project. It consists of initiation, scope planning, scope definition, scope verification, and scope change control.

Project Team Member The people who report either directly or indirectly to the project manager or coordinator.

Project Time Management A subset of project management that includes the processes required to ensure the timely completion of the project. It consists of activity definition, activity sequencing, activity duration estimating, schedule development, and schedule control.

Quality Assurance (QA) the process of evaluating overall project performance on a regular basis in order to provide confidence that the project will satisfy the relevant quality standards.

Quality Control (QC) the process of monitoring specific project results to determine if they comply with relevant quality standards and identifying ways to eliminate causes of unsatisfactory performance.

Quality Planning Identifying the quality standards that are relevant to the project and determining how to satisfy them.

Remaining Duration (RDU) the time needed to complete an activity.

Request for Proposal (RFP) a type of bid document used to solicit proposals from prospective sellers of products or services. In some application areas it may have a narrower or more specific meaning.

Reserve A provision in the project plan to mitigate cost and/or schedule risk. Often used with a modifier (e.g. management reserve, contingency reserve) to provide further detail on what types of risk should be mitigated. The specific meaning of the modified term varies by application.

Scope The sum of the products and services to be provided as a project.

Stakeholder individuals or organizations involved and may be affected by project activities.

Statement of Work (SOW) a narrative description of products or services to be supplied under contract.

V   Sources of Information

a   A Guide to the Project Management Body of Knowledge – Project Management Institute, 1996

b   First Nations and Aboriginal Communities Project Management Manual – Public Works Canada, October 2000