

Trade Union Training  
for Project Work

**Project Work for**  
**Trade Union Representatives**  
**Tutor Notes**

**etui.**



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This publication forms part of the toolkit **Trade Union Training for Project Work** produced by the Education Department of the European Trade Union Institute to support its programme of certified training in project work and project management for trade unions.

The following booklets are currently available in English and French:

- **Project Work for Trade Union Representatives – Course Book**
- **Project Work for Trade Union Representatives – Tutor Notes**
- **Trainers Course – Course Materials**
- **Trainers Course – Support Pack**

Others will be added over the course of the next few years.

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## **Introduction**

These *Tutor Notes* complement the participants' *Course Book* for the ETUI course *Project Work for Trade Union Representatives*. This is the Introductory level course of a new three-level training programme, to be delivered in part as national courses and in part by ETUI Education as European level courses. You can find more information about the courses at:

<http://www.etui.org/Services/Support-for-European-Trade-Union-Projects-SETUP/What-s-new-at-SETUP/Development-of-training-for-project-management>

In designing the Introductory Course, which is to be delivered by national organisations, ETUI had two objectives in mind:

- To develop an introductory course delivered at national level which would provide a common foundation for participants joining ETUI's intermediate and advanced level courses
- To provide a course which would provide an initial orientation to project work and would equip participants with elementary skills in project work which could be useful to them in their day-to-day work.

The *Tutor Notes* are intended as a support for tutors in national and sectoral organisations who are responsible for delivering the Introductory Course. They contain:

- Suggestions on how tutors might introduce the various activities in the *Course Book*
- Key points that it would be helpful to cover in plenary discussions
- Pointers to additional resources that tutors might wish to draw on in preparing and delivering the course.

The *Course Book* consists principally of activity sheets and worksheet pages in which participants on the Introductory Course can record their notes. It does not include hand-outs or other teaching material which will be necessary for the delivery of the course, as this is a matter of individual tutor choice and is likely to differ according to context. We have, however, provided suggestions of approach throughout these notes and have provided a variety of materials on the **ETUInet site** (see below) which tutors could use or adapt to their needs.

The *Course Book* and the *Tutor Notes* are available in English and French, as are most of the additional resources. ETUI encourages tutors to translate the materials and to adapt and/or supplement them with other resources that are appropriate and relevant to their specific national or sectoral context.

## **ETUInet – ETUI's online learning platform**

ETUI has established an online learning platform – [www.etuinet.org](http://www.etuinet.org). One section of this web-based platform is devoted to the courses on project work and project management. You will find there copies of course materials, additional tutor resources, discussion forums and other facilities that may help you in delivering these courses. The project work section is currently at an early stage of development but we hope that you will help us build this into a valuable resource by contributing your own ideas, experiences and additional materials.

During the *Trainers Course in Project Work*, tutors will receive a username and password to enable them to access ETUInet. Tutors who have not followed the Trainers Course but would like access to the project work section of the ETUInet site, should contact Silvana Pennella at ETUI Education.

## **Introductory Course – target group**

The Introductory Course *Project Work for Trade Union Representatives* sets out to provide an initial introduction and orientation to projects and project work for union reps and officers with little or no experience in this field. It could be particularly helpful for union staff involved in organising campaigns or events, recruitment drives, media campaigns, etc. It could be beneficial, too, for clerical, administrative and finance staff who are often tasked with reporting on projects but have little experience or understanding of what is involved. It aims to provide a set of skills and frameworks that can be applicable to a variety of contexts and challenges.

It is also an ideal grounding for those who wish to acquire further skills in project work and project management, as satisfactory completion of this course will normally be a pre-requisite for acceptance on ETUI's higher level courses in project management.

## Introductory Course – learning outcomes

The Introductory Course has 4 learning outcomes to be achieved by the end of the course.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1. Understand the key characteristics of project work	1.1. Describe the distinctive features of project work
2. Know how effective project work can assist the work of trade unions	2.1. Give examples of how effective project activity can help trade unions at a local, national or European level 2.2. Identify possible barriers to successful trade union project work
3. Understand tools and techniques for effective project work	3.1. Describe key tools and techniques for effective project work 3.2. Give examples of key elements of successful trade union project work
4. Be able to identify potential project opportunities for trade unions	4.1. Describe example of potential project opportunities for trade unions 4.2. Identify relevant sources of funding for potential project work for trade unions 4.3. Prepare a brief plan for a potential project that relates to the workplace or trade union setting

## Projects, project work and project management

It will be helpful to explain as clearly as possible what we mean by the different terms: *project*, *project work* and *project management*.

By *project*, we mean an activity that is formally referred to as being a project. It may be resourced simply by a single organisation's own mainstream resources, both human and financial, or it may rely partly or wholly on financial resources from one or more external bodies that can exercise some control over the project and to which it must make periodic reports.

By *project work*, we refer to the process of working on a project, but also to a variety of concepts, tools and techniques used in working on formal projects, which can be fruitfully applied to other activities and areas of trade union work that are not necessarily formally recognised as projects. This Introductory Course deals with both *projects* and *project work* but is principally focused on the latter.

By *project management*, we refer principally to the process of coordinating and managing formally recognised projects. The Introductory Course does not focus on project management as such, although it may occasionally touch on the coordination of less formal project work. Project management as such is dealt with in ETUI's higher level courses.

## Delivery of the Introductory Course

The *Project Work for Trade Union Representatives* course is accredited in the UK as a Level 2 course (equivalent to European Qualifications Framework Level 3) and is a 3 credit course, equivalent to 30 hours learning (not necessarily all class time).

The course is divided into three main sections:

- Part 1 (*Activities 1-4*) focuses on the nature of projects and project work and their importance and potential in a trade union context.
- Part 2 (*Activities 5-13*) is concerned with developing basic skills in key areas of project work – teamwork, scheduling, communications and publicity, budgeting, etc.
- Part 3 (*Activities 14-16*) then allows participants to develop a plan for a group project of their own choice before reflecting on how they might use and further develop what they have learnt on the course.

The course was originally conceived as a three-day residential course. Delivered in this manner, the timetable could look something like this:

<b>Day One</b> AM	Activities 1-4	Introduction Kinds of projects/Key features of projects Project activities in trade unions
PM	Activities 5-7	Project tasks Putting first things first Team work
<b>Day Two</b> AM	Activities 8-9	Establishing a team Communications & publicity
PM	Activities 10-12	Judging success Project costs Sources of funding
<b>Day Three</b> AM	Activities 13-14	Anticipating and avoiding problems Group project
PM	Activities 15-16	Group project (presentation & feedback) Taking stock and moving forward Course evaluation

In some contexts it may be beneficial to allow the course more time, spreading it over a four or five day block.

The course could equally well be delivered over several weekends, or alternatively as a number of day or half-day sessions over a period of several weeks. Tutors could also choose to devote more or less time to particular activities, depending on the experience of the participants and the time available.

Some organisations may wish to integrate elements of the course into other courses or qualifications. ETUI has no objections to that, providing that the origin of the materials is acknowledged.

However, one of the reasons for creating the Introductory Course was to provide a common entry basis to ETUI's second level course *Project Management for Trade Union Representatives*. For a course that was significantly different from the current Introductory course to be accepted for this purpose, it would need to be demonstrated that participants had achieved all the learning outcomes set out above and that in particular the following areas of work had been covered to an equivalent level:

- Understanding the role of project work on trade unions
- Work breakdown structures, Gantt charts and scheduling
- Teamwork on projects and resource assignment
- Communications
- Project costs and funding sources
- SMART objectives, performance indicators and evaluation
- Risk management.

## Group work

Although the course relies at certain points on short presentations from the tutor, and also on discussions in plenary session, its principal approach is through group work.

Tutor intervention during group work sessions should be limited. We recommend establishing at the outset a clear understanding with participants of the role of the tutor during these sessions. We suggest that:

- Tutors visit each group in turn at the start of a work session to check that the tasks are understood and to answer any initial queries.
- Participants should always know where to find tutors in the event of any serious difficulty arising.
- Tutors monitor group activity occasionally during the course of the work but intervene directly only if they observe that the group is having serious difficulty in making progress.

In most of the activities, it will help if the composition of the groups is decided by the tutor who should aim wherever possible to maintain a balance of experience and gender in each group.

We recommend that tutors change the group composition at various points in the course, although there are certain constraints in the way in which the course is structured:

- In Part 1, there is no necessity to keep the same groupings for all activities.
- In Part 2, however, *Activity 5 Project Tasks* marks the beginning of a sequence of activities, finishing with *Activity 13 Anticipating and Avoiding Problems*, which are all developed within the framework of a particular project outline. For this reason, it is strongly recommended that the composition of the group remains the same throughout the sequence, with the exception of the Team Game in *Activity 7*. Optimum group size for these other activities is 4 or 5 people.
- *Activity 14* is another point at which groups could be reconfigured.

For the group work, we suggest that each activity has a chairperson, a timekeeper and a rapporteur and that these roles revolve with each activity, with all members of the group having an opportunity to take on each role.

You will most probably need either a very large plenary room, with space to accommodate 3 or 4 working groups or (preferably) a plenary room and individual break-out rooms for each of the groups, each with a flipchart and/or a computer.

## Team-building games

Team-building games provide a fun way of strengthening teams. Somewhere in the middle of a course, once people have had time to get to know each other a little, these activities are great to pass on the messages of the benefits of group work.

For the members of the team to think and act as a team they have to realise that success comes only from the work of the team and that the benefits of the success are shared by the team as a whole.

A project has higher chances of success when everyone works together for a common goal that has already been agreed and is clear from the beginning. Team-building games help develop an atmosphere of trust, confidence, good communication, energy and creativity. Team-building helps put everyone in a spirit of cooperation. The success of a project depends on the ability of individuals to build effective teams. A team building game helps the participants in a more relaxed fashion to:

- Improve their leadership skills
- Break down the barriers that might hinder creativity
- Define clearly objectives and goals
- Identify the strengths and weaknesses of each participant and the team as a whole
- Improve the means and abilities to solve problems
- Improve working methods so as to undertake tasks in the most effective and timely way.

It is important to give very clear instructions to the participants and allow time for questions before they begin to play the game. Once the game has started, the tutor should monitor the game to ensure that the instructions are followed and deal with any problems that might arise. Otherwise, the tutor should not interfere but allow the participants to learn by playing.

Much of the learning, however, is likely to come in the period of reflection and discussion after the game itself. It is important that this is clearly focused by the tutor to enable participants to understand key learning points.

## Acronyms and jargon

Project work and project management has developed a specialised vocabulary, as too has the European Commission. Course participants are likely to encounter various acronyms and other terminology with which they will be unfamiliar. The *Course Book* includes a *Jargon Buster* sheet which is placed immediately following *Activity Three*. This intended as a resource for participants to use throughout the course to note and clarify any terms which are new to them. The Tutor Notes on the activities highlight terms which are likely to be introduced in the individual sessions. There is also a *Glossary* towards the end of the document which tutors can add to as they feel appropriate.

## The use of IT in the Introductory Course

The *Project Work for Trade Union Representatives* course is capable of being delivered without the need for participants to use computers, although it would still be useful for the tutor to have access to a computer and video-projector and to the internet.

Each of the activities in the course is capable of being undertaken either with a computer or with a combination of flipchart, pens, Post-It notes and sticky paper.

The choice then is left with the individual tutor and may in certain cases be constrained by circumstances: lack of access to equipment, participants' lack of computer skills, etc. Where either choice is possible, there are various considerations that tutors might like to bear in mind:

### Flipchart

Pros	Cons
<ul style="list-style-type: none"> <li>– Easy to use, no technical skills involved</li> <li>– Whole group can contribute / add / change</li> <li>– Can be quickly and easily displayed and remain pinned up for duration of course</li> <li>– Easy to demonstrate comparison between two or more groups' work</li> </ul>	<ul style="list-style-type: none"> <li>– Not easy to correct / revise</li> <li>– Not the most appropriate form for more polished presentations</li> <li>– No built-in error checking for e.g. calculations</li> <li>– No means of exchanging data with a computerised program</li> </ul>

### Computer

Pros	Cons
<ul style="list-style-type: none"> <li>– Speedier for competent users</li> <li>– Easily edited and revised</li> <li>– Easy to share via video-projector</li> <li>– Software can reduce errors and can recalculate</li> <li>– Data can be shared between different programmes and different users</li> <li>– Produces more polished presentations</li> <li>– Essential for the production of reports, project applications, budgets, etc</li> <li>– Useful to have internet access for research</li> </ul>	<ul style="list-style-type: none"> <li>– Requires skills which not all participants may have</li> <li>– In group work, the computer may be monopolised by one or two people</li> <li>– More difficult to show two or more examples of work side-by-side</li> <li>– May take time to transfer work from group work computers to plenary computer and video-projector</li> <li>– May encounter technical problems</li> </ul>

With both possibilities available, it may be best to vary the choice of medium, using IT particularly in those activities where it might be used to best advantage.

However, those participants thinking of going on to more advanced courses or of getting more involved in project work will need at least a basic familiarity with wordprocessing, a spreadsheet program, PowerPoint or equivalent and a web browser. These are skills that are essential to a project manager and will be vital for participants joining ETUI's second level courses in project management.

## Additional resources

The notes on several of the activities contain references to additional resources. These resources fall into two major categories:

- *Additional resources available on ETUInet* – these include:
  - References to sections of ETUI’s publication *Trade Unions and Transnational Projects* a copy of which can found on ETUInet. Tutors might find some of these references helpful in preparing to deliver particular sections of the course, although much of the material is at a higher level than that of the Introductory Course.
  - Electronic versions of forms and templates which participants can use in working and reporting on activities.
  - Other supporting material which tutors may find useful in delivering the course or may wish to adapt, including Project Outlines (to provide the context for group work in several of the activities), PowerPoint presentations on specific topics and a series of case studies, providing examples of various trade union projects at both national and European levels.
- *Additional resources available on the Internet* – these represent additional background information which is mainly intended for tutors, rather than for presentation to course participants. Nonetheless, some participants might also find some of the information and web-based tools useful in their day-to-day work.

In addition, the full texts of these *Tutor Notes* and the accompanying *Course Book* can be downloaded as .DOC files from ETUInet.

# Introductory Course

## Part I

The first part of this Introductory Course is concerned with introducing participants to the key characteristics of project work and helping them understand the important role that project activity can play in trade union work.

*Activity 1* is principally an icebreaker, enabling the participants to start to get to know each other, but at the same time allowing them to share something of their experience of project work and their expectations of the course.

*Activities 2* and *3* focus on exploring the key characteristics of projects, while allowing participants to draw on some of their own experiences.

*Activity 4* examines the contributions that projects can make to trade union work.

Following *Activity 1*, the tutor should also make a short presentation of the course objectives and outline its structure. S/he should also introduce the idea of **portfolio-building** (see the *Trainers Course Materials*) and answer any questions that arise at this stage, before moving on to the course work proper in *Activity 2*.

## Activity 1

### Partner interviews

#### Aim

- To enable the participants to get to know each other.

#### Setup

This is a simple activity which needs little preparation.

Group partners in pairs. As far as possible, try to ensure a reasonable gender balance and avoid pairing people from the same workplace or organisation. This activity can be carried out in the plenary room.

The partners take it in turns to interview each other, using the *Interview Sheet*, to note key points from the responses.

#### Plenary session

Each person presents his/her partner in turn to the rest of the group. If time allows, it might be useful to clarify or comment on some of the responses dealing with what participants hope to gain from the course. This could lead into a brief presentation by the tutor of the outline of the course, perhaps supported by a PowerPoint presentation.

## Activity 2

### Different kinds of projects

#### Aims

- To begin to understand the range of different types and scales of activities that could be considered as 'projects'
- To provide a background for the exercises and presentations that follow.

#### Setup

This is a quick brainstorming exercise about different examples of 'projects'.

The *Activity Sheet* presents it as a group activity followed by reports to the whole course group. However (particularly if time is short), it could equally well all be handled in a plenary session, with the tutor writing the group's suggestions on a whiteboard or flipchart. Alternatively, you could choose to treat it as a pair activity, with participants remaining in the plenary room. It could also be combined with *Activity 3*.

The responses will inevitably be unpredictable but one would expect – and encourage – examples that are hugely diverse in nature, scale and complexity:

- Organising a concert
- Building the Channel Tunnel
- Moving office
- Making a web site
- Designing a new car
- Organising a wedding
- Making a feature film
- Publishing a newsletter
- Getting to the moon

These are just a handful of examples to be thrown in, if necessary, but the group will probably come up with equally diverse ideas. At this stage, the idea is not to focus specifically on projects which might involve trade unions.

## Activity 3

### Key features of projects

#### Aims

- To raise awareness of the specific characteristics of projects and project work
- To discuss the nature of project work and to highlight its distinctive features

#### Setup

This activity is presented as a group activity. The first part of the exercise could also be handled as a plenary discussion, as a continuation of *Activity 2*. In this case, the group activity would be focused simply on creating a definition of a project. What follows assumes that the activity follows the course set out in *Activity Sheet 3*.

Start by referring back to the lists of project examples produced in *Activity 2*. *Activity 3* invites participants to reflect on what those activities have in common; how they might differ from activities which are not 'projects'. Introduce *Activity Sheet 3*. Working in groups of 4 or 5 people, participants should consider these questions and list what they see as the key characteristics of 'projects'. It may be helpful to set a limit on the number of characteristics – say, 5 or 6 – as an aid to helping participants concentrate on key aspects. Drawing on the list, they should then try to produce a succinct definition of what constitutes a 'project'.

#### Plenary discussion

The groups report back and share their work.

**Key points** that are likely to emerge and that can usefully be highlighted are:

- Projects are normally limited activities - limited by time, limited by money, limited in scope
- Projects normally involve teams of people – often from different backgrounds, disciplines, organisations – collaboration and communication are important
- Projects are often externally funded and require a lot of administration and reporting – and careful planning
- Projects are frequently associated with innovation, creating new things, devising new methodologies.

Working from the individual group definitions, it may be possible to arrive at a composite definition which satisfies the whole course group. This could be pinned up on a flipchart sheet throughout the rest of the training course, as a reminder. It could also usefully be

returned to towards the end of the course to see if participants want to change or add anything.

Another possibility might be briefly to compare the group's definition with one or two other, more formal definitions of project work. Here are two that we've used in similar exercises:

- "A project is a planned temporary activity, involving multiple parties, with a fixed starting date, specific goals and conditions, defined responsibilities, a budget and a fixed end date."
- "A project is a carefully defined set of collaborative activities using clearly defined resources (money, people, materials, energy, space, provisions, communication, etc.) to achieve the pre-determined project goals and objectives within a specified time frame."

This is a good point at which to introduce the idea that not all of the ideas that the participants listed in *Activity 2* would necessarily be called 'project' or be formally recognised as such; nonetheless most will share the key characteristics that participants have listed and will benefit from some of the same concepts, approaches and techniques as more formal 'projects'. This course is in part about formal 'projects' but it also about ways of thinking, tools and techniques which can be helpful in less formal project work. (See the note in the Introduction to these *Tutor Notes*.)

To round off the session (and as another 'characteristic' of projects), the tutor could usefully introduce the idea that many projects follow a certain pattern, frequently referred to as the '**project life-cycle**'.

There is no single accepted model of the project life-cycle but most are based on a 4-stage process to which is sometimes added a fifth element of Monitoring and controlling:

- **Initiation** – includes the original idea, possible feasibility studies, assembling a core team and gaining outline approval to move the project forward
- **Planning & Design** – includes all the detailed planning and budgeting for the project, designating additional personnel, sourcing any materials or equipment, etc
- **Execution** – is when the plans are put into action and the main work on the project undertaken
- **Completion** – would normally include some kind of final review and report and the handover of any products to their eventual users
- **Monitoring and Controlling** – are processes for keeping the project on track throughout its life-cycle

## **Additional resources available on ETUInet**

*Trade Unions and Transnational Projects*, chp 2.  
*Project Life-Cycle* (PPT)

## Activity 4

### Project activities in trade unions

#### Aims

- To identify some of the possibilities for project work in trade union organisations.
- To understand how effective project work can help trade unions.
- To identify some of the key factors for success in project work in trade unions.

#### Setup

It is likely that few of the examples provided in *Activity 2* related to trade union contexts. So why are trade unions interested in project work? What kinds of formal projects do trade unions tend to get involved in? Think about local, national and international levels. And what other activities in trade unions can usefully be thought of as 'project work' and benefit from similar approaches? Introduce *Activity Sheet 4*. Four or five people per group. This is a more complex set of questions and participants may need a little more help than in previous activities.

#### Plenary discussion

Each group reports back and answers are compared and discussed.

Among the key points that could be brought out in discussion are:

- Kinds of projects that may be formally recognised as such:
  - Producing a set of training materials
  - Organising an information campaign about environmental or health and safety issues
  - Introducing a new service for members
  - Producing a research report
  - Organising an international conference or seminar
  - Producing and delivering a new training programme
- Examples of other trade union activities where a project work approach could be helpful
  - Producing a newsletter
  - Establishing a web site
  - Moving office
  - Organising a recruitment campaign
  - Organising a demonstration
  - Introducing new office software
  - Establishing workplace learning opportunities

- Projects can offer useful possibilities for collaboration – both with other trade unions, as well as with enterprises, local and regional authorities, research institutes, colleges and universities. Through such collaboration, organisations may be able to achieve things that they would be unable to manage alone.
- Trade unions, like other organisations, can benefit from innovation. New ideas may also come from working with others. Projects, because they are limited, can also offer time and resources for experimentation within strictly circumscribed limits. If they are then successful, their results can be rolled out more widely.
- More and more funding (both state funding and finance from other sources) is being made available as project funding (i.e. tightly targeted and time-limited) rather than as core organisation funding. Trade unions increasingly need the skills to access and utilise these kinds of resources productively.
- On the other hand, organisations need to be wary of just following the money. A project will only have potential benefit for a trade union if it can make a clear contribution to helping achieve its strategic goals as an organisation.
- Trade unions need to ensure that they have the resources (particularly human resources) to be able to deliver their part of the project. There is an increasing need in trade unions for people with some training in project work to be involved both as partners in projects and as project managers and project leaders, as well as being able to use these skills in their everyday work.

## Case studies

As a way of rounding off the session, it might be helpful to look briefly at one or two **case studies** of trade union projects, both to demonstrate variety of scale and to consider success factors.

One of ETUI's objectives in developing this course is that it should provide a common foundation for those participants who wish to go further in training for project work on the higher level courses that are delivered by ETUI at a European level. Although the Introductory course is being delivered in a national context, it would also be helpful if tutors included an example of a **transnational project** to draw attention to the possibility of trade unions being involved in European or other transnational projects.

You will find details of several examples of trade union projects – both national and transnational projects – among the additional resources on the ETUInet site. These include written reports, publicity materials and videos. You may also have excellent examples of your own from your own organisation or national context which might be more appropriate and more accessible for your participants. If so, please use them – and also upload them to the Introductory Course discussion forum on ETUInet so that they can be available for others to use.

In considering the success of a project, it is worth emphasising that this may be seen not only in the **results** of the project – the new products or services produced – but also in the ways in which the **work processes** of the project can also embody core trade union values, such as cooperation, democratic participation, gender and other equality issues, sustainability and environmental awareness.

## **Personal action points**

Draw attention, too, to the final section of the worksheet which provides an opportunity for participants to note down any ideas that may have been generated by this first section of the course for actions that they might take in their own union or workplace.

## **Additional resources available on ETUInet**

Descriptions of several trade union projects of various scale:

- SEK Youth project – Young People and the Enlarged EU
- LIFT project (Women and Trade Unions – Stronger Together)
- Scottish Union Learning - Skills Utilisation Projects
- TTUPO – Training Trade Union Project Officers
- TRACE – Trade Unions Anticipating Change
- DeLTTUE – Developing e-Learning Tools for Trade Union Education

# **Introductory Course**

## **Part II**

This section of the course is concerned with introducing participants to some of the key areas of work involved in a project. The approach is practical, focused on group activity to explore the demands of a specific trade union project. This will need to be supported by brief presentations by the tutor, some introductions to a few basic concepts and simple tools, and by plenary discussions giving supportive feedback on the results of the group work.

These Tutor Notes offer some guidance on key learning outcomes as well as on organisational points. In addition, we have provided some resources on ETUInet – Excel files, PowerPoint presentations, etc – which tutors may find helpful. Feel free to adapt these or to substitute or supplement with others. Remember, though, that the aim of the course is to provide an initial orientation and introduction to project work and avoid overloading participants with too much or too detailed information.

### **Project work and projects**

A reminder that, although the reference point throughout the course is to 'Projects', the focus is on 'project work' – a set of techniques and approaches, derived from project management, which can be productively applied in many situations, not simply in activities that are formally recognised as 'Projects' in organisational terms. What the course should prioritise is the project 'mindset' and the set of tools, techniques and concepts which derive from it. Participants should be encouraged to recognise the usefulness of the project approach in preparing many different kinds and scales of activities.

## Activity 5

### Project tasks

#### Aims

- To understand the importance of identifying distinct task in project work
- To practise skills in identifying the key tasks necessary for the successful completion of a project

#### Set up

The *Course Book* contains an activity sheet and a *Project Tasks* worksheet.

Most of the activities in this second section of the course are framed in relation to a specific project. Participants receive a specific *Project Outline* which provides the framework of a project idea, as well as in broad terms its principal objectives and constraints. We have provided two *Outlines* immediately following this note (also available on ETUInet). Tutors are invited to contribute other ideas to expand the collection.

We recommend that the tutor selects one of the *Project Outlines* beforehand (or alternatively produces a similar outline for a different project idea themselves). All groups should work on the same outline for this and subsequent activities. This helps keep attention focused during plenary discussions and also offers the possibility of groups learning from each other as they compare ideas.

#### Tutor presentation

It could be helpful to preface the activity with a brief presentation from the tutor on the initial elements of project planning (which do not form part of the activities participants are asked to undertake at this stage) and on the importance of identifying key tasks within a project.

In project work, a distinction is made between the **aim** (or **goal**) of the project and its **objectives**.

- A project is likely to have a single **goal** or **aim** which will encapsulate what the project as whole is intending to achieve. It will be closely related to the goals of the organisation sponsoring the project. These are likely to be set out in very general terms and may well not be wholly realisable through a single project. The goal / aim sets out the changes you hope to achieve as a result of your work.

- 
- A project is likely to have several **objectives** – lower-order statements which will all contribute to the overall goal. The objectives describe the activities to be undertaken or the services to be provided to bring these changes about. They represent defined end points to be achieved by the project. (We will return to objectives later in this sequence of activities, when we look at evaluation. For the moment it is sufficient to introduce the idea here.)
  - For example, a trade union project may have as its goal to help improve the access of marginalised groups to the job market. Among the specific objectives might be:
    - To establish a drop-in centre to provide information and advice
    - To establish links with a local college providing access to training courses
    - To work with the college to construct a new course to prepare people for the job market
    - To establish a group of local employers to support the scheme
    - To offer support to users in making job applications and preparing for interviews
  - Each of these objectives can then be broken down into a series of **tasks**, actions that are necessary to attain that objective. If we take the drop-in centre as an example, the key tasks might include:
    - Agree service to be offered
    - Find premises
    - Recruit or allocate staff
    - Publicise centre and services
  - Confronted with a major undertaking of any kind, we initially have no idea how we can achieve it and feel overwhelmed. The key is first to break it down into smaller parts to make it more manageable. We can do so by first breaking it down into major areas of work each with a series of key tasks.  
This is known as a **Work Breakdown Structure** or **WBS**. We have included in the Additional Resources for this activity an example of a Work Breakdown Structure for work on producing a newsletter that tutors can use as an illustration.

Following the presentation, setting up the activity itself should be straightforward:

- An explanation first that for this and several subsequent activities participants will work in small groups on a specific project idea.
- A brief presentation of the *Project Outline*
- A presentation of the composition of the groups
- An acknowledgement that participants will need to spend a little time discussing the content of the project, but should avoid going into too much detail. It is more important to identify the principal areas of work involved in the project rather than, for example, planning a detailed programme for an event.
- A presentation of *Activity Sheet 5*, emphasising that the focus is on main or key tasks (within each of which there may be a host of other smaller tasks). We envisage that 15-20 key tasks should be adequate to encompass the work involved in these projects. It is not necessarily a problem if a group has identified fewer tasks, as long as the work of the project is comprehensively covered. A list of more than, say, 25 tasks would suggest that a group is getting into too much detail for this stage.
- Emphasize, too, that this activity does not ask for a chronological sequence. Starting at the beginning and then working through is often not the best way to proceed with

this activity. It is much better to start by brainstorming the major blocks of work and then identifying the key tasks within them.

## Plenary discussion

Groups present their work – using either a flip chart or a video-projector – with a brief discussion following each one.

At this stage, the focus should be on:

- Has the group covered all the main areas of work? Are there important omissions?
- Are the tasks roughly comparable in terms of importance or weight? Are there major imbalances?

Don't worry about the order of tasks at this stage.

In terms of omissions, it is quite likely that groups may not have included tasks concerned with:

- Coordination, internal communications, management
- Evaluation
- Publicity, PR, external communications.

These omissions need not be pointed out at this stage as they will be the subject of later activities.

In concluding the plenary discussion, the tutor should introduce

- The possibility of grouping tasks and forming tasks and sub-tasks, where appropriate
- The idea of *workpackages* – see *Glossary*

Let participants know too that there will be an opportunity as part of the next activity to add to or amend their list of tasks.

## Additional resources available on ETUInet

- *Project Outline 1* (DOC)
- *Project Outline 2* (DOC)
- *Work Breakdown Structure* (PPT)

**Project Outline – The Conference**

*Your union is very concerned by the low level of membership in the under 25 age group and has set as one of its priority goals to involve more young people as active members.*

*As a first step towards this goal, it has decided to organise a conference in 9 months time, so that it can draw on the experience of other organisations that have had some success in addressing this challenge.*

*The conference will involve a series of presentations by guest speakers, including one from a sister organisation elsewhere in Europe, as well as a series of working groups.*

*The conference will last for two days and will aim to attract 150 delegates from around the country. Your group is given the task of coordinating the event.*

*Your union is also looking to attract as much publicity as possible, and is expecting the conference to generate a published report.*

**Project Outline – Schools project**

*Your union is very concerned about the lack of understanding among young people about the work of trade unions and wants to make a positive change in this area.*

*One idea is to mount a programme in schools to familiarise youngsters who are beginning to think about the world of work with the role that trade unions play.*

*Your union decides to invest initially in a pilot project, aimed at 15-16 year-olds in 10 secondary schools, and gives your group the task of organising this. Ideally, you are hoping to have 2 sessions in each school.*

*Amongst other things, there will be a need for materials to support the sessions and one or two trade union reps to talk with the students.*

*Your union also wants a written report on the project.*

*You have 9 months to complete the project.*

## Activity 6

### Putting first things first

#### Aims

- To understand the importance of sequencing and scheduling tasks in project work
- To practise skills in sequencing and scheduling the key tasks necessary for the successful completion of a project

#### Set up

Here's a possible way of starting the session:

*'What we're beginning to do is to work out a plan to deliver our project. The plan will cover several different aspects of the project. We're going to start with planning TIME. We could just start to plan by making a **simple list** of tasks and dates (show example). Or we could use a **planning calendar** (show example). We could add to this some **milestones** (show example and refer to Glossary). One of the most common tools, however, is a **Gantt chart** (show example). This is what we're going to use.'*

What is a Gantt chart? It is a kind of bar chart, named after Henry L Gantt who first devised this system of task representation. The Gantt chart provides a graphical representation of the project by mapping individual tasks on to the project calendar. It is constructed with a horizontal axis representing the total time span of the project, broken into segments (usually days, weeks, months or quarters), and a vertical axis representing the tasks that make up the project. Each task is represented by a horizontal bar.

For this exercise, tutors need to decide whether they want participants to use a flipchart/whiteboard with coloured pens and sticky paper or to use the computer. If the latter, demonstrate how to use the *Gantt Chart Template* (an Excel file available on ETUInet – for instructions, see below). You might also find it helpful to use the *Scheduling PowerPoint* (also available on ETUInet).

*'Some hints in planning TIME:*

- *You will need to think about the **duration of tasks** (how long do you need to complete each task – and in this instance we're not thinking about how many hours/days work it is but how long it takes from start to finish)*
- *You will also need to think about the **sequence of tasks** (which task comes first, which task can only start when another one has been completed)*
- *Which tasks can be handled in parallel or can partly overlap in time?'*

Present *Activity Sheet 6*. Advise participants not to spend too long on revising their task list. The main focus of the activity is on sequencing the tasks using the Gantt chart.

## Plenary discussion

Each group presents its work – feedback and discussion.

In closing you might mention:

- That there are **project management tools** (both software programs and online tools) of varying degrees of sophistication which allow production of more complex Gantt charts, allowing you to link tasks and sub-tasks, to define various linkages between different tasks, to measure and report progress against an initial plan, and which will automatically re-calculate your plan if you move or extend one of the tasks. Perhaps provide one or two examples – but no significant details (that would be to move into project management, which is the concern of more advanced courses).
- That the other important aspect of TIME in project work is **personal time management** – being organised, prioritising tasks, keeping your own work on schedule. This, too, is not a principal concern of this course, but you can easily find handbooks, software and online tools, as well as courses, which can be useful here. Maybe provide one or two examples briefly that participants can follow up if they're interested.

## Additional resources available on ETUInet

- *Trade Unions and Transnational Projects* pp 38-43
- *Scheduling and Gantt charts* (PPT)
- *Gantt Chart Template* (Excel)

### Note on Gantt Chart Template

This is an Excel spreadsheet but its use requires *no prior knowledge of Excel itself*, simply the ability to use a keyboard and mouse. The template has space for up to 30 tasks, but more rows can be added if necessary. The Time axis is currently set up with 40 weeks, but this too can be altered or extended.

Users need to enter their Group No and the Title of the project they are working on. They should then enter the names of the tasks they have previously identified in Column A.

As they discuss and determine the duration of each task, they should enter the **Number** of the week in which the task should start and the number of weeks it will last. The program will automatically calculate the finish week and add a task bar to the Gantt Chart.

## **Additional resources available on the Internet**

### Project management software

- *Webplanner* – a relatively simple online tool with a structured approach to project planning. Free version for single project.  
See [www.webplanner.com](http://www.webplanner.com) with sample Gantt at <http://webplanner.com/site/index.php#tour>
- *Microsoft Project* – an industry standard tool but sophisticated and expensive.  
See <http://www.microsoft.com/project/en/gb/default.aspx>
- *Mindview* – an innovative approach to planning projects.  
See [http://www.matchware.com/en/products/mindview/mindview2\\_be/gantt.htm](http://www.matchware.com/en/products/mindview/mindview2_be/gantt.htm)

### Time management

- [http://www.mindtools.com/pages/article/newHTE\\_00.htm](http://www.mindtools.com/pages/article/newHTE_00.htm)
- <http://www.timemanagement.com/>

## Activity 7

### Team work

#### Aims

- To understand the importance of good teamwork
- To improve skills in working together effectively in a team situation
- To appreciate that planning, commitment, cooperation and good communication ensure good results.

#### Setup

- Materials needed:
  - Pipes
  - Marbles (or tennis balls)
  - A whistle
  - "Warning" tape or chalk (to mark the route)
  - 2 baskets – 1 at the start of the route and 1 at the finish
- Mark out the route on the floor beforehand, either with 'warning' tapes or with chalk
- Space requirements – the length of the route can be flexible but should also take account of the number of people in the group. It should be at least double the total length of all of the pipes
- Group – this could be played with a whole course group of 15 – 20 people. However, the larger the group the more difficult it will be to achieve coordination and focused attention. Ideally, group size should not be below 6, nor exceed 12 participants.
- Instructions for game – see *Course Book Activity 7*

#### During game

While participants plan and prepare (during the preparation time) take notes:

- Are they all talking together?
- Is there a leader?
- Is everyone given the chance to express his/her ideas?
- Is everyone participating actively?
- Is anyone timing the activity?
- Are they working on a Plan B (in case Plan A doesn't work)?
- Is everyone clear as to what is to be done?
- Were there any "roles" given?

## Plenary discussion

Following the fun of active involvement in the game, the tutor's role is to lead a calmer reflection on how the groups responded to the challenge and in particular how they worked together as a team. These are some of the questions that might be useful.

- How successful was your group?
- What were the main challenges?
- How well did you meet challenges such as:
  - Time management?
  - Different kinds of contribution and different characters & styles of cooperation?
  - Different degrees of commitment & participation?
  - Problem-solving, decision making & leadership roles?
- What skills & aptitudes did you need to be successful?
- What is crucial to make team work effective?
- What lessons have you learned from this exercise?

At the end of the plenary discussion, allow 5 minutes for participants to fill in the worksheet on this activity. The worksheet asks them to list the most important things they have learnt personally from the activity as well as providing another opportunity to note any Personal Action Points.

## Additional resources available on ETUInet

- *Trade Unions and Transnational Projects* pp 25-28

## Activity 8

### Establishing a team

#### Aim

- To understand and practice skills in identifying and organising roles and responsibilities in a project team

#### Setup

This activity returns to group work on the *Project Outline*, but framed within the experience of the team game.

Refer back to the definition of a project (*Activity 3*) and the discussion of the team game (*Activity 8*). *What kind of a team will you need to deliver your project? How many people? What particular roles/functions?*

Emphasize:

- The group is unlikely to be able to rely just on its own resources. It will probably need to involve others within its own organisation and beyond.
- It is the needs of the project that should determine the composition of the team – and the team needs to be balanced and functional. (No point in having a football team comprised entirely of goalkeepers, however good they are!)
- Team members need to be assigned specific tasks – in project work terminology, this is called *assigning resources*.

One of the simple planning tools that can help with this is called a **Responsibility Assignment Matrix** (or **RAM**). Introduce and explain the tool (*RAM example 1*).

Present *Activity Sheet 8*. The focus of the RAM is on the project team but there may well be other parties whose assistance is essential in delivering specific parts of the project (e.g. experts, speakers, graphic designers) and who can also usefully be included on the RAM. In this case, one could, for example, distinguish project team members in bold-face or by colour and also highlight who has responsibility for coordinating the task.

## Plenary discussion

Each group presents its work – feedback and discussion.

In closing, the tutor might:

- Mention the possibility of adding a final column to the RAM showing the completion date for the task (*RAM example 2*)
- Show a **Task Report** with resource allocation automatically generated by project management software – an alternative approach to using a RAM

At the end of the plenary discussion, allow 5 minutes for participants to fill in the *Team Work Reflection Sheet*. The worksheet asks them to list the most important things they have learnt personally from this and the previous activity, as well as providing another opportunity to note any Personal Action Points.

## Additional resources available on ETUInet

- *Trade Unions and Transnational Projects* pp 25-28
- *RAM example 1 – Simple RAM* (PPT)
- *RAM example 2 – RAM from Trainers Course* (DOC file)
- *RAM template* (Excel)
- *Task Report - TTUPO Course Task List* (PDF - produced by Project KickStart Pro)

## Activity 9

### Communications and publicity

#### Aims

- To understand and identify appropriate forms of internal and external communications in project work
- To prepare a simple communications plan

#### Setup

This activity is aimed at helping participants to understand the importance of good communications in project work: both communications between the various members of the project team (the Team Game in *Activity 7* should have helped demonstrate the importance of this) and also good communications with external audiences, including the project target group, the funders and other stakeholders, such as the union and its members.

This activity will benefit from a clear introduction from the tutor, focusing initially on the need for good communications within the project team and perhaps providing a couple of examples of problems that can arise through lack of communication or through things that are not communicated clearly.

These can be starting points for the first part of the activity: what measures can participants put in place to make sure that these kinds of problems are avoided? These are some of things that might usefully be considered:

- Who in the team needs to be consulted/know about what?
- Will there be a person in the team with specific responsibility for keep everyone informed about developments and keeping copies of internal documents?
- Will most of the communication within the team be handled in face-to-face meetings? If so, how frequent? Who will make a record of decisions taken?
- If it's difficult to meet frequently, can the team communicate by phone (including phone conference) or by e-mail? It may also be worth thinking about web-based communication tools (see **Additional resources**) which can provide a combination of structured messaging and discussions, calendars and To-Do lists, as well as a central storage facility for documents.

We also need to think about external communication – outside the project team. The project may have a clear target group – potential participants for a training course or for a conference, for example. *How can they best be contacted and how can we attract them? Who else would it be good to inform about what we're doing – our union members, funders, etc? If the project is successful there are probably others that we want to inform. Who are they and how can we best do this? What's the best means of getting our information and our messages across? And what's the right time?*

This introduction may be an appropriate point at which to introduce a bit more project terminology (see *Glossary*):

- *Target group*
- *Stakeholder*
- *Dissemination*

Following the introduction, present *Activity Sheet 9* and ensure that participants understand the tasks.

## Plenary discussion

Each group presents its work – feedback and discussion.

Possible points to pick up/emphasize during the discussion:

- In the project team, make sure that everyone is kept 'in the loop' but avoid overloading people with information
- Effective team meetings have a clear agenda and reach clear decisions, so that everyone knows what is to be done
- The most expensive and sophisticated publicity materials are not always the most effective. Try to find appropriate means that are you can handle easily and that are within your resources. Don't forget existing channels of communication within your union – circulars, newsletters, magazines and meetings.
- Don't leave all your publicity until the end of your project. You might usefully promote the start of your project, or a specific element within it, as well as the end result.

In closing, you might:

- Show a couple of examples of good promotional material
- Emphasize that communications – particularly the publicising of your project activities – is an important task. If they've not already included them, they should add to their Gantt Chart and RAM two tasks: **Coordination** (or Administration/Management) and **Dissemination** (Publicity).

Again, at the end of the plenary discussion, allow a little time for participants to fill in the *Communications and Publicity Reflection Sheet*.

## Additional resources available on ETUInet

- *Trade Unions and Transnational Projects* pp 61-63
- *Dissemination Action Plan – DeLTTUE Project* (DOC)

## Additional resources available on the Internet

Online collaboration tools:

- *Basecamp* - <http://basecamp.com/>
- *Teambox* - <http://teambox.com/>
- *DeskAway* - <http://www.deskaway.com/>

## Activity 10

### Judging success

#### Aims

- To understand the importance of clearly specified performance criteria in evaluating the success of a project
- To understand the importance of planning evaluation activities
- To practice defining objectives and performance criteria

#### Setup

As the title of the exercise suggests, this activity is about evaluation. The key things that we want participants to understand are:

- It is important for the project team to know whether or not its project work is being successful. There are probably others, too, who need to know this (e.g. funders, partner organisations, local/regional authorities).
- It is difficult to evaluate whether work is successful, if its objectives are not clearly defined. The more precise we can be about what the work is setting out to achieve, the easier it will be to assess its success.

This activity will need a careful introduction and some examples to illustrate key concepts. It is also an opportunity to refer back to the issue of **objectives** which we touched on in the introduction to *Activity 5 Project Tasks*.

Here is a reminder of what was said there:

- A project is likely to have several **objectives** – lower-order statements which will all contribute to the overall goal. The objectives describe the activities to be undertaken or the services to be provided to bring these changes about. They represent defined end points to be achieved by the project.
- Objectives should be as precise as possible. Ideally, they should be SMART
  - S**pecific
  - M**easurable
  - A**chievable
  - R**elevant
  - T**ime-related

For example:

- To produce a new quarterly newsletter on workplace safety issues to be circulated to 150 workplace reps, starting in September 2012

We gave the example of a trade union project whose goal was to help improve the access of marginalised groups to the job market.

- Once we have defined our objectives, we need to know what will constitute success in each case. In the case of the drop-in centre, for example, how many people will it need to receive per week for it to be considered successful? What are the essential facilities or characteristics it will need to have? These will form the **performance criteria** against which its success can be judged. It might help to think of them as 'thresholds' that must be achieved in order for the project to be considered successful.
- Finally, we need to give some thought to how we will know whether or not an objective has met the performance criteria we have established. What evidence do we need and how might we obtain it? This will obviously depend on the details of the specific objective and criteria but could include surveys, feedback forms, interviews, focus group discussions, admission logs, observation.

Having covered these key points, participants should be in a position to begin to consider these questions in relation to their group project. Present *Activity Sheet 10* and ensure that everyone is clear about the task.

The activity asks the participants to define their project's key objectives. This is something that would normally be done in an early phase of planning and would form the basis of identifying project tasks. However, the process of planning is an **iterative** one: decisions made at a later stage of planning will necessitate a review of earlier decisions. It is certainly very helpful when considering the issues of evaluation and what will constitute success for the project, to return to the specified objectives and if necessary refine them. They will form yardsticks against which the success of the project will be judged.

## Plenary discussion

Each group presents its work – feedback and discussion.

Possible points to pick up:

- Objectives are about actions and should start with 'To...'
- Qualitative and quantitative criteria
- It is true that a large element of judging the success of the project can only be undertaken at the end of the project, when its results are clear. However, it is important also to build in points for evaluating progress during the work itself so that, if things are not going according to plan, adjustments can be made and action taken to correct them. This is known as **formative evaluation**.
- It is also often the case that the real results of a project can't be fully judged until some time after the project itself has finished. For example, if the work of the project is to prepare and distribute materials about new training opportunities, it will probably be some months before their impact will be visible and it is possible to measure how successful the action has been.
- If evaluation has not yet been included as a key project task, groups should add it to their Gantt charts and RAMs. On the Gantt chart, it should run from the start to the end of the project as there will be aspects of evaluation to be conducted throughout, although the bulk of the work may well be at the end.

## **Additional resources available on ETUInet**

- *Trade Unions and Transnational Projects* pp 70-75

## **Additional resources available on the Internet**

- *The Evaluation Cookbook*  
<http://www.icbl.hw.ac.uk/lti/cookbook/>
- *How to write SMART objectives*  
<http://rapidbi.com/writesmartobjectives/>
- *How to write goals and objectives*  
<http://nonprofit.about.com/od/foundationfundinggrants/a/goalsobjectives.htm>

## Activity 11

### Project costs

#### Aims

- To identify those areas of work in a project that will generate costs
- To identify those costs and to categorise them

#### Setup

By this stage of the course, participants will have had a basic introduction to many of the key elements of project work: scheduling, resource assignment, teamwork, communications & dissemination, and evaluation. This session begins to look at the area of finance; it is, though, handled at a very elementary level.

The activity is not about budgeting; it is rather focused on a pre-budget process of simply identifying the different costs involved and grouping them into categories. The level of detail in which it is appropriate or possible to consider the issue of project finance will vary according to the participants' prior experience and the time available.

What is presented here is what we consider essential for this Introductory Course; in some cases it may be possible to develop ideas a little further, without getting lost in too much detail and complexity.

A crucial element of any project is its cost. Before we can begin work on a project activity, we need to have a finance plan. This means having as accurate an estimate as possible of what it is going to cost and a plan for how that cost is going to be met. We need a budget.

The process of preparing a simple budget is not complicated. We need to:

- Identify all of the items for which we are likely to incur costs
- Estimate the price of each – and, where practical, base this on actual price lists or quotations
- Add the sums together.

To prepare a budget may seem daunting at first, but we have already made the task much easier by producing the Task List and RAM, which identify the various actions in the project and who is involved in each. Simply work through each task in turn, listing the costs involved.

This next activity does not require you to prepare a fully costed budget but simply to think about the principal costs that your project is likely to incur and begin to group

them into major categories of cost. You are **not** asked to estimate **how much** things are likely to cost, so there are no sums involved in this activity.

Introduce *Activity Sheet 11*. It may be useful to give an example of grouping costs into major categories: participants may have identified costs for telephone, postage, photocopying, stationery, etc, which could be grouped together as 'Office Costs' or 'Overheads'. In the case of arranging an important meeting, as another example, the costs may include a number of flights, rail fares, room hire, hotel accommodation, food and, of course, the salaries of the people involved. So here we might have 'Travel costs', 'Subsistence costs', 'Room hire' or 'Premises costs' and 'Personnel /Staff costs'.

Advise participants to concentrate on **major** items of cost, otherwise if they go into too much detail they may not complete the exercise. If they do not have time to work through all of the tasks, this is not necessarily a problem, as long as they have identified a range of different costs and begun to group them into categories.

Participants can use the *Project Costs* worksheet and/or a flip chart to conduct this activity.

If using a flipchart, consider providing participants with Post-It notes on which the various cost items can be written. It is then easy to re-arrange them into groups as they are categorised.

If most of the participants are familiar with using a computer, however, they could use the *Excel Cost Categories Template*. Cost items can be listed in the first column, cost categories in the second column. This would allow items to be entered randomly but then to be sorted and grouped by cost category.

[**To sort the list in Excel**, first use the cursor to select/highlight the rows in which content has been entered, including the two column headers. Then click **Data > Sort**. In the next dialogue box, make sure that the box *My data has headers* is ticked, select *Cost Category* from the drop down menu under *Column Sort By*, and then **OK**.]

## Plenary discussion

Each group presents its work – feedback and discussion.

Key points:

- There are no 'rights' and 'wrongs' about how participants chose to categorise costs i.e. the number of categories and what they are called, but check for consistency of approach
- Check, too, for any major areas of cost that seem to have been omitted
- Point out that, if the project is externally funded, funding bodies will often have application forms with pre-determined cost categories which it is important to respect.

These will vary from case to case but there are likely to be some standard categories including:

- Staffing costs
- Travel and subsistence costs
- Equipment costs
- Materials costs
- Overhead costs
- Funding bodies are likely also to have specific rules about what kinds of costs are acceptable, as well as rules about maximum levels of funding for particular items.

If time allowed, it might be useful as a demonstration in the plenary session to prepare a fully costed budget for **just one** of the tasks from one of the groups, using the template below:

- *Task Budget Template* (Excel) – the workbook has in-built formulae and will calculate automatically. The second sheet has a partly completed example.

### **Additional resources available on ETUInet**

- *Cost Categories Template* (Excel)
- *Task Budget Template* (Excel)
- *Trade Unions and Transnational Projects* pp 47-55

## Activity 12

### Sources of funding

#### Aim

- To consider and identify possible sources of funding for project work in trade unions

#### Setup

This is a relatively short activity.

Whereas the previous activity invited participants to consider the various costs involved in mounting their project, this activity turns to address the issue of how those costs might be funded. Again, it is a pre-budgeting exercise, looking at kinds and sources of income and involves no figures or calculations. Nor does it require a detailed knowledge of financial regulations.

Unless the participants have some familiarity with trade union finance (e.g. they come from finance or administration departments), the tutor may need to provide quite a lot of guidance, explanation and information in the introductory part of the session.

We suggest, though, that rather than starting with a formal presentation, the tutor begins by simply posing the question '*Where might you find the money to meet the costs of a trade union project?*' and that as far as possible the session is handled as a plenary discussion. This allows participants to share any ideas or experience they have. The tutor should, of course, have some examples to draw on.

These could include:

- Self-funding
  - Single trade union
  - Partnership of several unions or branches
- Grant funding
  - Local/regional authorities
  - Central government
  - Charities
  - Lottery funding & similar
- Commercial funding
  - Sponsorship
  - Advertising
  - Income from sales of products, admission fees, etc.

This list is not meant to be exhaustive and the possibilities will also vary in different national contexts. The important thing is simply to make sure that participants are aware of some of the possibilities before they break into groups to discuss the possible sources available to finance their own project.

## Plenary discussion

Each group presents its ideas.

- There may be an opportunity to compare and contrast different approaches and for the tutor to suggest other sources that might be considered. There might also be a discussion about whether it might not be appropriate for a trade union to take advantage of certain sources of funding or sponsorship.
- The tutor could also explain that few funding bodies will be prepared to wholly finance a project. This means that the finance will have often have to be put together from more than one source, and that in many cases the body that is making the application (i.e. the trade union) will need to contribute a certain percentage of the cost itself. This **own contribution** often takes the form of union staff contributing some or all of their time to the project without the union claiming any reimbursement.
- This is also another opportunity to draw attention to the possibilities offered by EU funding, both directly from Brussels or devolved and administered through national agencies. The EU annual budget includes funds that are specifically dedicated to support industrial relations and social dialogue, workers' representation in European Works Councils, information and training activities. Many of its major funding programmes also support areas in which trade unions have strong interests, including mobility and exchange programmes, lifelong learning, equal opportunities, employment and solidarity. ETUI and the current training programme on project work are also financially supported by the EU.

## Additional resources available on ETUInet

- *Trade Unions and Transnational Projects* pp 47-55

## Additional resources available on the Internet

- <http://www.etui.org/Services/Support-for-European-Trade-Union-Projects-SETUP>
- <http://www.etui.org/Services/Support-for-European-Trade-Union-Projects-SETUP/Open-Calls-for-proposals-and-tenders>

## Activity 13

### Anticipating and avoiding problems

#### Aims

- To understand potential problems that might affect project work
- To develop skills in ranking risk factors
- To identify ways of minimising or avoiding risks in project work

#### Setup

Explain that projects are often associated with innovation – introducing a new service or product or doing things in a different manner. For this reason, because they are in part going to be dealing with unknown factors, there are inevitably going to be risks involved.

It is important to give some consideration to this:

- To identify the risks
- To consider their likely impact on progress
- To consider the likelihood of them occurring
- To consider what steps can be taken to avoid or minimise the risks – particularly those with a high probability of occurring and those likely to have a significant impact on the progress of the project.

The *Risks* PowerPoint presentation in the **Additional resources** might be a useful way of introducing this.

With a group more experienced in risk assessment, it might be appropriate also to use a more sophisticated model with more categories and with mathematical weighting, although this would probably then require some alterations to the *Risk Template* worksheet. We have included a second, more complex model – *Risk Assessment Matrix* - in the **Additional resources**.

Introduce *Activity Sheet 13*.

## Plenary discussion

Each group presents its work – feedback and discussion.

Some key points:

- Common risk factors include:
  - Setting unrealistic objectives
  - Allowing too little time
  - Not having enough money
  - Workplan has not been thought through in sufficient detail
  - Insufficient or inappropriate skills and experience in the team
  - Team members are ill or drop out
  - Team members don't deliver
  - Lack of support from the lead organisation itself, so low priority
  - Changes in external environment
- The most common factors are:
  - Poor leadership
  - Poor communication
  - Poor administration
- Some risks can be avoided; some can be minimised; some just have to be accepted. All, however, need to be monitored and the project team should have a plan for this.
- As risks are identified, it may be necessary to add additional tasks to the project plan to monitor and/or to minimise them. This is another point at which to emphasise the need to continually review and adjust any plan. Planning a project is normally an iterative, rather than a purely linear, sequential process.

## Additional resources available on ETUInet

- *Risks* (PPT)
- *Risk Assessment Matrix* (DOC)

## Additional resources available on the Internet

- <http://blog.keyedin.com/building-an-effective-project-risk-management-scoring-matrix>
- <http://students.sae.org/competitions/aerodesign/nasarisk.pdf>

## **Introductory Course**

### **Part III**

This is the final section of the course.

*Activity 14* allows participants to draw on what they have learnt in the course so far to construct an outline proposal for a group project of their own.

*Activity 15* provides an opportunity to reflect on what they have learnt, how they might be able to use it, and how they might further develop their skills and experience in project work.

*Activity 16* provides the participants' evaluations of the course.

## Activity 14

### Group project

#### Aim

- To practise developing an outline plan for a project to take place in a trade union or workplace setting

#### Setup

This activity acts as a summation of the work in the previous part of the course and provides an opportunity for participants to develop an outline of a trade union project from an idea of their own.

Present *Activity Sheet 14* and look at each section of the *Project Outline* worksheet in turn to ensure that participants understand what is required.

- Participants will again work in groups but there is no necessity for the groupings to be identical to those used for *Activities 5 – 13*
- Emphasize the importance of the project ideas being ones that could benefit their workplace or their union
- Advise against projects which are overly ambitious or overly complex.
- The group should complete all sections of the *Project Outline* worksheet.

It is likely that groups will find most difficulty in choosing an appropriate topic. It could be helpful to structure the first part of the activity as follows:

- All participants spend 5 minutes jotting down possible ideas
- The group spends not more than 20 minutes sharing ideas and choosing one
- They present their idea to the tutor who gives them some feedback, helping them shape the idea and steering them away from any obvious pitfalls

It is important that the group should not be left to flounder at this stage, nor to embark on inappropriate project ideas. It is a good idea for the tutor to have one or two simple project ideas to suggest in case of an emergency. The aim should be to ensure that the group is beginning to address the detail of the project no later than 30 minutes into the group activity.

## **Plenary discussion**

Each group presents its work – feedback and discussion.

In the feedback, the tutor can suggest ways in which the outline could be improved.

Areas which might benefit from more focussed attention might be:

- Objectives
- Sources of financial support
- Risk

## Activity 15

### Taking stock and moving forward

#### Aims

- To review any aspects of the course that would benefit from further clarification
- To consider how you can begin to use what you have learnt and how you can further develop skills in project work.

#### Setup

This activity begins as an individual activity, allowing the participants individually to reflect on the ground covered in the course before thinking about how they might use what they have learnt and how they can deepen that knowledge. These individual contributions then form the basis for a shared discussion in plenary.

This is one of the last activities on the course and offers an opportunity for participants to reflect on what they have learnt. Recap briefly the journey of the course.

Introduce *Activity Sheet 15*.

Participants spend c. 15 minutes responding to the three sections of the worksheet.

#### Plenary discussion

It is probably best to break this into two separate sections, taking responses from participants in turn on the first topic and discussing this, before doing the same with the final two points.

- Points for further clarification

Here the tutor must use his/her judgement about responses. There may be certain points that can be quickly clarified. Others may be more fundamental and require much more than the time available. In these cases, it may be appropriate to refer the participants to some further reading, or to open a discussion in an online forum. Some may be more detailed technical issues which might be covered in some of ETUI's more advanced courses.

If time allowed, it would be interesting to spend 5 minutes returning to the course group's definition of a project from *Activity 3* to see whether the group wished to make any changes in the light of their experience.

– Using what has been learnt / Gaining more experience

One obvious way of using what has been learnt and gaining more experience is to join a project team, working initially in a relatively small role. This may, however, not be something that is immediately available to all participants. There are likely, though, to be situations in everyday work where some of the skills of project work and some of the techniques could be helpfully employed in organising relatively small-scale routine activities. Participants can also productively share some of the approaches and thinking with colleagues in the union and in the workplace.

If the course has been successful, it should have stimulated an appetite for participants to learn more and gain more experience of projects and project work. The tutor could usefully recommend:

- Further reading
  - Web sites on project work
  - Project work software tools on e.g. planning and collaboration
  - Further training courses, including the ETUI's transnational courses on project management
  - Courses for participants who need to further develop IT skills
- Tutors should also consider the feasibility of establishing an online community for the participants from the course (and from other national courses) which could facilitate exchange of ideas and mutual support.

## Activity 16

### Course evaluation

This activity provides feedback on the course as a whole. It is structured in three parts:

- Participants spend about 5 minutes completing the *Evaluation Sheets* individually
- The tutor then divides participants into groups of 4 or 5 to discuss and provide a group evaluation.
- In a plenary session, a spokesperson from each group delivers the group reflection on the course, focussing in particular on:
  - Aspects of the course that they have found particularly useful or enjoyable
  - Ways in which the course might be strengthened or improved.

Tutors should also consider the possibility of a **post-course evaluation exercise**, say two or three months after the end of the course, to canvass participants' more mature reflections on the experience of the course and to discover whether and how they have been able to use what they have learned.

**ETUI has need of information both about the course evaluations and about the participants themselves. It would be helpful if tutors could forward information about each of the national courses and their participants to Silvana Pennella ([spennell@etui.org](mailto:spennell@etui.org)).**

## **Glossary of Abbreviations, Acronyms and Terminology used in Project Management and in EU Funding Programmes**

In this glossary, we have provided a definition of some of the specialised terms from project management, particularly in the context of EU funding programmes.

The words underlined indicate a reference elsewhere in the glossary.

### | A |

#### **Applicant Organisation**

The organisation within a Consortium that is legally responsible for a project application.

### | C |

#### **Consortium**

The grouping of organisations that will be responsible for the direct implementation of a project.

#### **Coordinating Organisation**

The organisation within a project responsible for the overall leadership and day-to-day management. Normally this is also the Applicant Organisation, although the two roles may in some cases be handled by separate organisations.

### | D |

#### **Deliverable**

A term used in project management to refer to the end result or product of a particular stage of the project's work, normally of a workpackage. Distinction is sometimes made between internal deliverables (i.e. which are for the benefit of the project team and are essential elements of the working process) and external deliverables which are final products to be presented to the project's external stakeholders and beneficiaries.

#### **Dissemination**

A planned process of providing information on the quality, relevance and effectiveness of the results of programmes and initiatives to key actors and stakeholders.

### | E |

#### **EQF**

European Qualifications Framework – the common European framework to describe learning outcomes, covering the entire span of qualifications, both academic and vocational. (DG Education and Culture)

## **Europa**

main web portal of the European Union, with links to other EU servers. URL: <http://europa.eu>

## **Evaluation**

Evaluation allows a qualitative and quantitative assessment of the results achieved against the aims (as regards activities/products, etc).

## | F |

### **Follow-Up Activities**

Follow-up activities take place after a project is finished in administrative terms. Their aim is to keep results alive and sustainable. They may include updating results, certifying the results, further take-up of the results, transfer of the results to another sector or target group, or the commercialisation of the results.

### **Formative Evaluation**

Evaluation activities undertaken during the course of a project or other activity to ensure that work is on course or to enable corrective action to be taken in the event of any problems. This kind of evaluation provides important feedback for the project team.

## | G |

### **Gantt Chart**

Named after Henry L Gantt, a Gantt chart provides a graphical representation of a project. It is constructed with a horizontal axis representing the total time span of the project, broken into segments (usually days, weeks, months or quarters), and a vertical axis representing the tasks that make up the project. Each task is represented by a horizontal bar.

## | I |

### **Innovation**

Innovative results are those which represent some new and distinctive features, distinguishing them from others with similar characteristics, and adding value in relation to conventional solutions.

## | M |

### **Milestone**

Milestones provide the basis by which project implementation is monitored and managed. They are key events that provide a measure of progress and a target for the project team to aim at, including most frequently the date estimated for completion of an activity, a workpackage or a deliverable.

### **Monitoring**

In relation to a project, monitoring involves continuous and systematic control of the project's progress. The intention is to correct any deviation from the operational objectives and thus improve the performance. Monitoring consists of supervision of activities, comparison with the work plan and using the information obtained for the improvement of the project.

## | N |

**Needs Analysis**

In relation to a project, a needs analysis is often an integral part of preparation, taking place at the planning stage, before starting the project (*ex ante needs analysis*). The aim is to define the needs of a target group (future beneficiaries and users of the project results) and to better orientate the project's activities, with the objective of meeting those needs.

**Network**

Formal or informal grouping of bodies active in a particular field, discipline or sector.

## | O |

**Overheads / Overhead Costs**

These terms refer to certain costs, usually relatively small, which are associated with the administration and organisation of a project and which it is difficult to identify and calculate separately from the general running costs of the organisation participating. They include items such as postage, photocopying, heating and lighting. In many cases, a lump sum figure or a small percentage of the project budget is accepted as a means of acknowledging these costs, without the necessity to provide detailed calculations or documents to justify.

**Output**

A project deliverable may also be referred to as an 'output'. The term includes any particular services, results, or products that are generated as a result of a particular project-related process. Outputs can come in a multitude of formats, including written reports and specifications as well as material products and prototypes.

## | P |

**Product**

In project management, a term usually employed to refer to one of the tangible outputs of a project (e.g. a publication, a training course, a web site).

**Project Contractor**

The organisation or institution responsible for submitting a project for funding, for signing the contract for funding and for carrying the legal and financial responsibility for its execution.

**Project Life-Cycle**

A series of phases through which most projects pass from the original idea to the final delivery (and in some cases beyond). There are several widely recognised models of the Project Life-Cycle with different numbers of stages and differences in nomenclature. Among the most widely used is one with a five-stage process, with the stages commonly labelled as *Initiating, Planning & Developing, Execution, Completion, and Monitoring & Controlling*.

## | R |

**RAM**

See Responsibility Assignment Matrix

### **Responsibility Assignment Matrix**

A tool for indicating the assignment of personnel to tasks, taking the form of a grid structure normally with the vertical axis listing individual tasks and the horizontal axis indicating individual personnel.

### **Result**

The initial impact of a project, generally assessed at the time of the project's formal conclusion.

### | S |

### **Sustainability**

Sustainability is the capacity of a project to continue its existence and functioning beyond the end of the project period *per se*. The project results are used and exploited continuously. Sustainability of results implies use and exploitation of results in the long term.

### **Stakeholders**

Individuals or institutions that may, directly or indirectly, positively or negatively, affect or be affected by a project and/or a programme. Examples of stakeholders in the activity field of education and culture include decision makers, social partners and sectoral organisations.

### | T |

### **Target Group**

The target group of a project is those who will be affected directly and positively by the project by its activities and its results.

### | W |

### **WBS**

See Work Breakdown Structure

### **Work Breakdown Structure**

A work breakdown structure (or WBS) breaks down the work of a project into smaller elements (work-packages and tasks). The WBS reflects the structure of how work on the project will be implemented and performed and in which costs and data will be summarised and reported.

### **Workpackage**

A term used in project management which refers to the basic building block of a work breakdown structure. In most situations a workpackage can be thought of as a sub-project, comprising one or several major tasks.

## **Further reading**

Here are some suggestions for further reading that tutors may find useful:

- *Trade Unions and Transnational Projects* – ETUI’s handbook on projects and project work includes sections on project management, the EU and the ETUC, and on EU funding programmes of interest to trade unions. Available on ETUInet and also downloadable from the ETUI website at <http://www.etui.org/Publications2/Guides/Trade-unions-and-transnational-projects-8th-Edition>.
- *How to Manage a Camel* – a project management blog with interesting articles (see, for example, *Nine fundamental steps to project success*) <http://www.arraspeople.co.uk/camel-blog/projectmanagement/nine-fundamental-steps-to-project-success/>
- *Max’s Project Management Wisdom* – another blog with amongst other things a fairly exhaustive glossary of project management terminology at <http://www.maxwideman.com/pmglossary/index.htm>
- *Project Management Podcast* – podcasts on various topics relating to project work and project management <http://www.project-management-podcast.com/>
- *A Girl’s Guide to Project Management* – an award-winning blog with a wide range of articles, reviews and other contributions <http://www.pm4girls.elizabeth-harrin.com/>

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